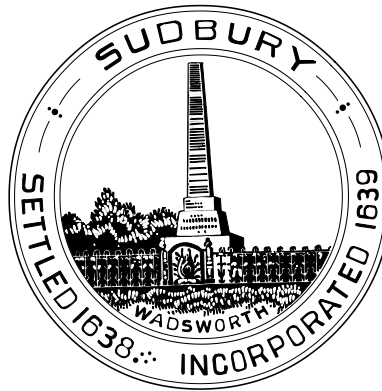


Town of Sudbury Massachusetts



OFFICIAL WARRANT 2012

**ANNUAL TOWN MEETING
May 7, 2012 7:30 P.M.**

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

BRING THIS BOOK WITH YOU



<p style="text-align: center;">TOWN OF SUDBURY 2012 ANNUAL TOWN MEETING WARRANT</p>

TABLE OF CONTENTS – Part I

	Page
ACCESS TO LSRHS and PROVISIONS FOR THE DISABLED	i
SUMMARY OF BASIC TOWN MEETING PROCEDURES	ii
CONSENT CALENDAR	iii
A MOTION PRIMER	v
 <u>ARTICLES:</u>	
1 Hear Reports	1
2 FY12 Budget Adjustments	2
3 Stabilization Fund	2
4 FY13 Budget	2
5 FY13 Capital Budget	4
6 FY13 Transfer Station Enterprise Fund Budget	5
7 FY13 Pool Enterprise Fund Budget	5
8 FY13 Recreation Field Maintenance Enterprise Fund Budget	6
9 Unpaid Bills	7
10 Chapter 90 Highway Funding (Consent Calendar)	7
11 Real Estate Exemption (Consent Calendar)	7
12 Town/School Revolving Funds (Consent Calendar)	8
Plumbing & Gas Inspectional Services	
Portable Sign Administration and Inspectional Services	
Cemetery – Cemetery Maintenance	
Conservation – Trail Maintenance	
Conservation – Wetlands	
Council on Aging – Activities	
Council on Aging – Van Transportation (MWRTA)	
Fire Department - Permits	
Goodnow Library	
Recreation Programs	
Teen Center	
Youth Programs	
Schools – Bus	
Schools – Instrumental Music	
Cable Television	
Regional Housing Services	
Rental Property	
Dog	

TABLE OF CONTENTS (Continued)**Page**

	Treasurer/Collector – Passport Fees	
	Zoning Board of Appeals - Permits	
13	Establish Stabilization Fund – Minuteman Regional Vocational School District	10
14	Town Center Traffic Improvements	10
15	Fire Department Safety Equipment Purchase	11
16	WITHDRAWN	12
17	Nixon Roof Replacement and Repair – MSBA Program	12
18	Natatorium HVAC and Associated Roofing	13
19	Town and School Roofs	14
20	Amend Zoning Bylaw, Art. IX, App. A – B.6 Update Definition of Agricultural Use	15
21	Amend Zoning Bylaw, Art. IX, App. A – Sec. 2313 – Regulate Raising of Roosters	15
22	Amend Zoning Bylaw, Art. IX – Sec. 5331 – Senior Residential Community	16
23	Amend Bylaw, Art. V(F), Stormwater Management Bylaw	16
24	Community Preservation Fund – Town Hall Architectural and Design Study	17
25	Community Preservation Fund – Town Center Landscaping Restoration	18
26	Community Preservation Fund – Historic Projects	18
27	Community Preservation Fund – Town-wide Walkways	19
28	Community Preservation Fund - Town Clerk Historic Document Preservation	20
29	Community Preservation Fund - Sudbury Housing Trust 10% Allocation	20
30	Community Preservation Fund – Pantry Brook Farm Preservation Restriction	21
31	Community Preservation Fund – Purchase and Restore Property (15 Hudson Road)	22
32	Community Preservation Fund – Amend Art. 43 of the 2006 ATM, Sudbury Housing Authority Unit Buy-down	23
33	Community Preservation Fund – General Budget and Appropriations	23
34	Resolution (non-binding) - Rail Trail Concord Town Line to Union Avenue	24
35	Resolution (non-binding) – Rail Trail (half-mile portion), Concord Town Line to Rt. 117, North Road	25

*Town Counsel Opinions (See Page 25.)

Part II – FINANCE COMMITTEE SECTION follows Page 26.

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 April 23, 2012. 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, non-resident appointed or elected representatives of the Town 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 of an article already acted upon 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 Moderator, Town Clerk and video operator in writing before they are made. Again, this is so there will be an accurate record of the meeting.

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.)

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.

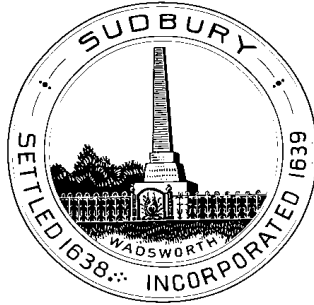
Frequently there will be a motion “to indefinitely postpone” an article. This motion, if adopted, kills the article for all intents and purposes for the Town Meeting. The motion is frequently used when proponents of an article have decided not to proceed with it but want an opportunity to explain to 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 “Call the question”, without being recognized by the Moderator but without interrupting a speaker. 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 7, 2012, 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 2011 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. FY12 BUDGET ADJUSTMENTS

To see if the Town will vote to amend the votes taken under Article 4, FY12 Operating Budget, of the 2011 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 FY12 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. FY13 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, 2012 through June 30, 2013, 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	FY12 Appropriated	FY13 No Override
300: Sudbury Public Schools: Net	28,734,794	29,196,525
300: SPS Employee Benefits (1)	6,629,690	6,400,242
300: SPS Employee Benefits Reserve (2)	43,087	695,993
Sub-total SPS Net	35,407,571	36,292,760
300: LS Operating Assessment: Net	18,079,955	18,847,524
300: LS Debt Assessment	2,193,072	2,142,548
300: LS E&D	-	-
Sub-total LS Assessments Net	20,273,027	20,990,072
300: Minuteman Regional Assessment	321,590	274,416
300: Other Regional School Assessments	-	-
Total: Schools	56,002,188	57,557,247
100: General Government (4&5)	2,325,635	2,383,917
200: Public Safety (3)	6,991,935	7,219,389
400: Public Works	3,304,146	3,390,044
500: Human Services	534,239	543,789
600: Culture & Recreation	1,166,009	1,125,243
900: Town Employee Benefits	4,465,977	4,451,774
900: Town-wide Operating & Transfer	401,148	392,925
1000: SPS/Town Emp Benefits Reserve	24,725	374,765
Total: Town Departments	19,213,813	19,881,847
700: Town Debt Service	3,883,860	3,798,521
TOTAL: OPERATING BUDGET	79,099,861	81,237,615
(not including Capital or Enterprise Funds)		
1 To be transferred to 900: Town Employee Benefits		
2 To be transferred to 1000: SPS/Town Employee Benefits Reserve		
3 Ambulance reserve funds to be transferred to 200: Public Safety (direct revenue offset)		
4 Enterprise funds to be transferred to 900: Town Benefits (direct revenue offset)		
5 Overlay Surplus funds to be transferred to 100: General Government (direct revenue offset)		

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 No Override Budget and will report at Town Meeting.

ARTICLE 5. FY13 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.

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
Capital & Capital Articles				
CIPC Items	523,383	529,054	538,947	552,421
Capital Expenditure Exclusions	0	0	0	0
Total Capital & Articles	523,383	529,054	538,947	552,421

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
Capital				
Town Buildings	70,000	116,771	59,607	51,925
General Government	22,622	11,955	0	37,000
Public Safety	25,000	10,000	72,396	61,659
Public Works	325,761	298,328	316,944	346,837
Human Services	0	0	0	0
Culture & Recreation	80,000	42,000	0	0
Sudbury Public Schools	0	50,000	90,000	55,000
Total: Operating Expenses	523,383	529,054	538,947	552,421

	FY13
	No Override
From Prior Year Capital Articles*	
Public Safety	7,091
Culture & Recreation	9,800
	16,891

*Motion at Town Meeting to include re-vote of prior year capital articles for new capital projects

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-37 under Capital Spending. The CIPC recommends approval of this article and will report at Town Meeting.

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

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the No Override Capital Budget.

ARTICLE 6. FY13 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 FY13 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.

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
TRANSFER STATION ENTERPRISE FUND				
Direct Costs (Budget)	256,534	260,805	290,389	297,461
Indirect Costs*	30,953	29,595	33,146	20,062
TOTAL: TRANSFER STATION ENTERPRISE	287,487	290,400	323,535	317,523
Transfer Station Receipts	328,482	360,239	323,535	317,523
Retained Earnings Used	0	0	0	0
Total Revenue	328,482	360,239	323,535	317,523

*Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee recommends approval of the No Override Budget.

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

ARTICLE 7. FY13 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 FY13 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.

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
POOL ENTERPRISE FUND				
Direct Costs (Budget)	455,118	485,381	517,230	516,197
Indirect Costs*	61,905	55,841	62,542	64,441
TOTAL: POOL ENTERPRISE	517,023	541,222	579,772	580,638
<hr/>				
Pool Receipts	474,265	487,506	480,000	515,000
Retained Earnings Used	0	0	37,230	1,197
Total Revenue	474,265	487,506	517,230	516,197
	-	-	-	-

*Budgeted and paid for by Unclassified Benefits (General Fund)

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee recommends approval of the No Override Budget.

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

ARTICLE 8. FY13 RECREATION FIELD MAINTENANCE ENTERPRISE FUND UDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY13 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.

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
RECREATIONAL FIELD MAINT. ENTERPRISE FUND				
Direct Costs (Budget)	113,606	150,908	309,614	276,943
Indirect Costs*	0	0	0	31,209
TOTAL: FIELD ENTERPRISE	113,606	150,908	309,614	308,152
<hr/>				
Field Receipts	170,493	183,976	309,614	307,425
Retained Earnings Used	0	0	0	727
Total Revenue	170,493	183,976	309,614	308,152
	-	-	-	-

*Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-41. The Finance Committee recommends approval of the No Override Budget.

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

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 2013; 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 every year to

adopt the local option since November 1997. Chapter 73, Section 4, of the Acts of 1986, requires annual acceptances 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 2012 was \$53,576. The FY12 benefit was \$278.07 (subject to annual C.O.L.A. index). Acceptance may result in a potential impact of up to \$556.14 (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 minimal income and 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. Approval of the local option would allow for an increase of the benefit for some eligible taxpayers. \$2,000 would be the maximum permitted benefit.

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 FY13 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 (Trail Maintenance)	Conservation Commission	\$ 5,000
Conservation (Wetlands)	Conservation Commission	\$ 35,000
Council on Aging Activities	Council on Aging	\$ 35,000
Council on Aging Van Transportation (MWRTA)	Council on Aging	\$ 70,000
Cemetery	DPW Director	\$ 20,000
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
Youth Programs	Park and Recreation Commission	\$ 50,000
Bus	Sudbury Public Schools	\$ 450,000

Instrumental Music	Sudbury Public Schools	\$ 75,000
Cable Television	Town Manager	\$ 30,000
Regional Housing Services	Town Manager	\$ 150,000
Rental Property	Town Manager	\$ 40,000
Dog	Treasurer/Collector	\$ 50,000
Treasurer/Collector Passport Fees	Treasurer/Collector	\$ 13,000
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 2013 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 – license fees collected from agricultural use of fields on conservation lands are used to fund trail maintenance on Town-owned designated conservation lands;
- 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 fares are used to pay salary and benefits of van driver and van operating expenses;
- Cemetery – sale of lots and other fees excepting perpetual care funds are used to fund maintenance of Town cemeteries;
- 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;
- Youth Programs– fees collected are used to fund youth 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);
- Regional Housing Services – membership fees of other towns and other external sources collected by the Regional Housing Services Office are used to fund all Regional Housing Services Office costs, inclusive of salaries, administrative expenses and other staffing costs;
- 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;
- 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 FY12 maximum voted for each fund except for Treasurer/Collector Passport Fees which has been increased from \$12,000 to \$13,000, Council on Aging Activities which has been increased from \$20,000 to \$35,000, Sudbury Public Schools Bus which has been increased from \$400,000 to \$450,000, and Cemeteries which has been reduced to \$20,000 from \$60,000.

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. STABILIZATION FUND ESTABLISHMENT – MINUTEMAN REGIONAL VOCATIONAL SCHOOL DISTRICT

To see if the Town will approve the establishment of a Stabilization Fund by the Minuteman Regional Vocational School District to pay costs of capital repairs, renovations, and improvements to the regional district school and its associated facilities, in accordance with the provisions of Chapter 71 Section 16G ½ of the General Laws; or take any other action relative thereto.

Submitted by the Board of Selectmen.

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: This article was submitted at the request of the Minuteman Regional Vocational School District. The Board of Selectmen will report at Town Meeting.

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

ARTICLE 14. TOWN CENTER TRAFFIC IMPROVEMENTS

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, to be expended under the direction of the Town Manager for construction of traffic improvements to the Town Center and all expenses therewith including professional and engineering, the preparation of plans, specifications and bidding documents, supervision of work and borrowing costs; and to determine whether said sum shall be raised 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: This article requests funds for the final engineering, contract document preparation and construction of traffic improvements to the Town Center. Noting the misalignment of the intersection and high number of accidents, as well as the need to install drainage and curbing in the area, the Selectmen appointed the Sudbury Center Improvement Advisory Committee in 2005 to assess the condition of the Town Center, including all infrastructure, roadways, utilities, pedestrian improvements, historical components, landscaping and other physical features found in the Town Center area, in order to increase the safety of the intersection of Concord Road and Old Sudbury/Hudson Road, and to enhance opportunities for recreational and cultural use as appropriate, while preserving the historical character of the area.

Funding in 2006 and 2007 from the Sudbury Foundation (\$50,000) and the Town (\$115,000) resulted in a lengthy public process to develop a context sensitive design for the road improve-ment project. Traffic studies were prepared and analyzed, the area surveyed and engineering plans drawn which propose a safer intersection, including a realignment of the roads both north/south and east/west, new traffic signals with dedicated left turn arrows for 3 of the 4 approaches, curbing, and pedestrian walkways and crosswalks. The plans also propose relocation of utility boxes and above ground vaults, and drainage improvements.

The Town has moved carefully and methodically through this project in order to balance competing needs and interests in the historic Town Center. The final plan reflects the community objectives determined during the public process, listed below:

- Preserve and protect historic, cultural and natural resources in the Center.
- Improve safety and accessibility for all those that use Sudbury Center.
- Improve traffic flow, but not traffic speed, through the Center.
- Protect the existing scale and visual character of the Center.
- Establish a clear sense of the Town Center as a civic location.

This intersection is a regional crossroad, servicing approximately 17,000 vehicles per day. Continuing the operation of the intersection in its present configuration will negatively impact the safety of all users of the Town Center, will extend the Town's non-compliance with state stormwater requirements, may create more difficult and expensive scenarios when the currently malfunctioning traffic signals fail, and will continue to create driver confusion and higher than average accident rates. The new plans as prepared represent a significant improvement to the safety of the intersection for both vehicular and pedestrian traffic, while respecting Sudbury's historic context.

The Board of Selectmen will report further at Town Meeting.

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

ARTICLE 15. FIRE DEPARTMENT SAFETY EQUIPMENT PURCHASE

To see what sum the Town will vote to raise and appropriate by transfer from Art. 5 of the 2009 Annual Town Meeting, Capital Budget, or other available funds for the purchase or acquisition of new Self Contained Breathing Apparatus (SCBA) for the Fire Department; said funds to be applied as a 5% match for funding from a FEMA Assistance to Firefighters Grant, if awarded, and to upgrade to additional safety options in the equipment obtained; or act on anything relative thereto.

Submitted by the Fire Chief.

(Majority vote required)

FIRE CHIEF REPORT: The Fire Department has submitted an application for a FEMA Assistance to Firefighters Grant for funding in the amount of \$216,168 for new Self Contained Breathing Apparatus (SCBA) to replace the SCBA purchased in 1989 and currently in use. As a requirement of the grant, if awarded, the Town will be required to pay a 5% match for the awarded funds and the difference to upgrade to additional safety options in each piece of breathing apparatus. SCBA is the single most important piece of equipment relied upon by a firefighter in an environment classified as immediately dangerous to life and health.

The Capital Budget set forth in Art. 5 of the 2009 Annual Town Meeting included funding for a traffic light at Fire Station 2 which project did not go forth because the cost was substantially more than appropriated. Therefore, these funds are available for use in 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 16. WITHDRAWN

ARTICLE 17. ROOF REPLACEMENT AND REPAIR – NIXON ELEMENTARY SCHOOL, MSBA PROGRAM

To see if the Town will vote to raise and appropriate, borrow or transfer from available funds, a sum of money to be expended under the direction of the Permanent Building Committee/School Building Committee for the purpose of the repair/replacement of a portion of the roof, and all expenses connected therewith, at the General John Nixon Elementary School, 472 Concord Road, which project would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program. The Massachusetts School Building Authority's (MSBA) grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any project costs the Town incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the Town. Any grant that Sudbury may receive from the MSBA for the project shall not exceed the lesser of (1) 36.89 percent (36.89%) of eligible, approved project costs, as determined by the MSBA, or (2) the total maximum grant amount determined by the MSBA.

Submitted by the School Committee, Sudbury Public Schools.

(Two-thirds vote required)

PERMANENT BUILDING COMMITTEE REPORT: Early this year, the Massachusetts School Building Authority (MSBA) announced its Accelerated Repair program, which provides for cost sharing for repair or replacement of school roofs. Under this program, MSBA would contribute 36.89 percent (36.89%) of eligible, approved project costs, as determined by the MSBA.

The older section of the Nixon School roof leaks and it has been determined that it is in need of a roof replacement. Given this, SPS and Town staff and committee members, working closely with the Permanent Building Committee (PBC) submitted a Statement of Interest (SOI) to the Massachusetts School Building Authority prior to the January 12, 2012 deadline for inclusion into the Accelerated Repair Program for the Nixon School roof replacement. The estimated cost of the project is \$705,000 plus the costs for debt issuance.

In order to be eligible for approximately \$250,000 in MSBA funds, the project must be approved at both a Town Meeting and a Town election that are required to take place within 90 days of MSBA's invitation into the program.

The Town is further required to obtain approval for the full cost of the project, including the local share and the MSBA share, but will bond only for the amount of the project less the MSBA share. If approved, the project must be completed within eighteen months. The current goal is to have the work performed during the summer of 2013 in order to avoid disruption of the educational operations of the school.

The portion of roofing over the older classrooms and the administration area section is more than twenty years old. While it has been patched for years, on an as needed basis, leaks continue in various areas. Water stains are apparent on ceiling tiles, interior walls and the underside of roof decking.

During 2010, the PBC engaged Russo Barr Associates, a roofing consulting firm, to conduct a detailed evaluation of all of the School and Town building roofs in order to develop a systematic roof replacement program. Their report allowed the Town to successfully participate in the 2011 MSBA Green Repair Program for replacement of the roofing, windows and boilers of the Noyes School and receiving over \$730,000 in MSBA reimbursement and \$48,000 in energy rebates from National Grid.

The report further indicated that this portion of the Nixon roof was in poor condition and should be replaced during FY 2012. In order to verify this schedule, in February 2012, the PBC authorized an infrared roof scan to be conducted with associated test cuts. These tests confirmed that much of the roof insulation was moist or wet and that the roof membrane had been compromised.

The MSBA Accelerated Repair program presents Sudbury with the opportunity to make the necessary repair that will ensure the long-term utility of the Nixon School, with the MSBA paying more than a 1/3 of the eligible, approved costs.

SUDBURY SCHOOL COMMITTEE REPORT: The Sudbury School Committee will report at Town Meeting.

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 18. NATATORIUM HVAC & ASSOCIATED ROOFING

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, to be expended under the direction of the Permanent Building Committee for the purpose of constructing, reconstructing, or making extraordinary repairs to the Atkinson Pool and roof area #2 at the Fairbank Community Center/Pool complex, and all expenses therewith including professional and engineering, the preparation of plans, specifications and bidding document, supervision of work and borrowing costs; and to determine whether said sum shall be raised by borrowing or otherwise; or act on anything relative thereto.

Submitted by the Building Inspector.

(Two-thirds vote required, if borrowed)

BUILDING DEPARTMENT REPORT:

Natorium HVAC - This Article requests an appropriation to fund the cost to replace the heating, dehumidification and fresh air supply system located on the rooftop at the Atkinson Pool. The existing 25-year-old unit is worn out, inefficient and obsolete. The external housing is deteriorated and internal components are rusted. Automatic heat recovery and humidification control functions are inoperative. Energy savings from replacing the unit are estimated at \$15,000 annually.

Roof Area #2 - The data that was compiled by Russo Barr Associates for the Roof Condition Survey Report in 2010 categorized the Fairbank Center Building into six different roof areas. Roof Area #2 is the smaller section of roof (2,700 sq. ft.) and is a low sloped, stone ballasted roof which covers the lobby and

the electrical room and houses the natatorium HVAC of the Atkinson Pool. This roof and the HVAC unit were installed together as new construction in 1987 and are currently 25 years old.

The report's corrective recommendation for Roof Area No. 2 is complete removal ("tear-off" application) and replacement with an adhered 60-mil reinforced PVC roof membrane system to include new rigid board roof insulation (tapered as necessary so as to achieve positive drainage; R-value to meet stretch energy code), flashings, edge metal, roof drainage system, repairs to deteriorated roof decking and a roofing manufacturer's 20-year full system labor and material warranty.

The HVAC system and this section of roof must be done in conjunction with each other and both have reached the end of their useful life. The HVAC system is no longer effective and the roof leaks.

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 19. TOWN AND SCHOOL ROOFS

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, to be expended under the direction of the Permanent Building Committee for the purpose of constructing, reconstructing, or making extraordinary repairs to the roofs or portions thereof at the following buildings: Nixon School, Fairbank Community Center/Pool complex, and Curtis Middle School, Loring and Haynes Elementary Schools and all expenses therewith including professional and engineering, the preparation of plans, specifications and bidding documents, supervision of work and borrowing costs; and to determine whether said sum shall be raised by borrowing or otherwise; or act on anything relative thereto.

Submitted by the Board of Selectmen and Sudbury School Committee.

(Two thirds vote required, if borrowed)

PERMANENT BUILDING COMMITTEE REPORT: In 2010, the Town and the Sudbury Public Schools, through the Permanent Building Committee, jointly commissioned Russo Barr Associates to conduct a comprehensive survey which included detailed on-site investigations of the roofing systems for all of the nineteen Sudbury public buildings. The survey is intended to serve a basis for a planned and systematic approach to roof repair and replacement as necessary over a 10-year period. The report set forth a recommended repair and replacement schedule based on the age and condition of each roof. This article will fund the work recommended to commence in 2012 and 2013, which includes replacement of the Fairbank Community Center roof and portions of the Nixon School roof, as well as capital repairs on several school roofs.

To confirm the actual need for the two recommended roof replacement projects, an infra-red survey and test cuts were performed on each roof area recommended for replacement. The Roof Condition Survey Report is published on the Town website.

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

SUDBURY PUBLIC SCHOOLS SCHOOL COMMITTEE: The School Committee will report at Town Meeting.

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

**ARTICLE 20. AMEND ZONING BYLAW, ART. IX, APPENDIX A -
UPDATE DEFINITION OF AGRICULTURAL USE**

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

Appendix A, use #B.6 (Exempt and Institutional Uses), to change the words “on a parcel of more than five acres in area” to “in accordance with M.G.L. c. 40A, s.3”; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: This article seeks to revise the Zoning Bylaw to be in conformance with State law regarding exempt agricultural uses. In 2010 the State Legislature amended M.G.L. c. 40A, section 3 to allow parcels smaller than 5 acres to enjoy the exemption provisions of this section so long as the parcel of land is at least 2 acres in size and produces income of at least \$1,000/acre. Prior to this amendment, a parcel of land needed to be at least 5 acres in size to be considered exempt from zoning provisions. As State law takes precedent over local bylaws, the Town must utilize the State definition.

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 21. AMEND ZONING BYLAW, ART. IX, SECTION 2313 AND
APPENDIX A - REGULATE RAISING OF ROOSTERS**

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

Section 2313 to substitute the word “roosters” for the word “poultry” in that section, and Appendix A, use #C.1 (Agricultural use, nonexempt) by adding a footnote “v” to that section which reads, “except those uses regulated under section 2313 of the Zoning Bylaw which shall require a special permit from the Board of Appeals”; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: This article seeks to revise the Zoning Bylaw to address the emerging popularity of backyard chickens. Currently the Zoning Bylaw requires a special permit to raise any type of poultry. As backyard chickens have become more popular in Sudbury, and seem to meet with neighborhood approval in most cases, the need for a special permit seems onerous. This article deletes that requirement. However, roosters create more noise and this article seeks to create that regulation by requiring a special permit only for the raising of roosters. This article does not change any other provision related to farming and agriculture in Sudbury, which is a farm-friendly community.

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 22. AMEND ZONING BYLAW, ART. IX, SECTION 5331 - REVISE MINIMUM TRACT SIZE FOR SENIOR RESIDENTIAL DEVELOPMENTS

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

Section 5331 (Senior Residential Community – Tract Qualifications) by substituting the number “10” for the number “20” in that section, effectively changing the allowable size of such developments from 20 acres to 10 acres; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: This article seeks to expand the number of properties on which a Senior Residential Community can be built by decreasing the minimum tract size for the development. In decreasing the tract size from 20 acres to 10 acres, this article creates consistency with the other residential special permits in the Zoning Bylaw, including Cluster Developments, Flexible Developments and Incentive Senior Developments, which are all allowed on tracts of 10 acres or more. This change will allow an alternative type of development on more moderate sized parcels. Senior housing has been lauded in Sudbury as desirable for allowing older residents to remain in the community, as well as capturing unencumbered revenue by creating development that does not drain municipal and school services.

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 23. AMEND BYLAWS, ARTICLE V(F) - STORMWATER MANAGEMENT BYLAW

To see if the Town will vote to amend the Town of Sudbury Bylaws, Article V(F) (Stormwater Management Bylaw), as follows:

- A. Section 5.B.2 (General Stormwater Management Permit (GSMP) Thresholds) by deleting the words “including paving, repaving or resurfacing, of from 500 square feet to 2,000 square feet” and substituting “including paving or resurfacing of any pervious surface, of from 500 square feet to 5,000 square feet” so that section reads as follows:

5.B.2 Disturbance or alteration, including paving or resurfacing of any pervious surface, of from 500 square feet to 5,000 square feet of land in a commercial, industrial, institutional or exempt use provided there is no net increase in impervious surface; unless such use is an existing non-conforming use prohibited under Section 4242 of the Town of Sudbury Zoning Bylaw (Water Resource Protection District).

- B. Section 5.B.3 to add the word “sewer or septic,” after the word “water” so that section reads as follows:

5.B.3 Construction or maintenance and repair of utility lines (gas, water, sewer or septic, electric, telephone, etc.) other than drainage lines or systems, which will alter terrain, ground cover, or drainage patterns.

C. Section 5.C.4 by changing the number “200” to “1,000” so that section reads as follows:

5.C.4 Any activity, including clearing or removal of vegetation, that will disturb or alter 1,000 square feet or more of land in areas with 20% or greater slopes.

D. Section 5.C.5 by deleting that paragraph in its entirety and replacing it with the following:

5.C.5 Any activity, including paving or resurfacing of any pervious surface, on any parcel of land in a commercial, industrial, institutional or exempt use that will disturb or alter greater than 5,000 square feet of land.

E. Section 5.D. by adding a new #4 and renumbering the sections thereafter, which reads:

5.D.4 Normal maintenance of Town roads, walkways and other infrastructure.

F. Section 4.A by adding the words “hereby known as the “Reviewing Agent” at the end of that section.

G. Sections 4.E, 4.F and 4.G by adding the words “or its Reviewing Agent” after the words “Planning Board” throughout those sections; or act on anything relative thereto.

Submitted by the Planning Board.

(Majority vote required)

PLANNING BOARD REPORT: This article seeks to refine the provisions of the Stormwater Management Bylaw adopted at the 2009 Annual Town Meeting. Over the past 2 years, the Planning Board has issued over 40 permits under the Bylaw and desires to make the Bylaw more useable and less onerous on applicants, who are predominantly single family house owners. The changes proposed increase the thresholds slightly in 2 key areas – development on grades greater than 20%, and development on commercial properties. The thresholds in the original Bylaw were too low, requiring permits to be issued for several very small projects. The new thresholds are slightly higher and will adequately regulate development without compromising environmental quality. Other minor changes do not change the intent of the Bylaw, but are meant to clarify provisions that have been brought to our attention.

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 24. COMMUNITY PRESERVATION FUND – TOWN HALL ARCHITECTURAL AND DESIGN STUDY

To see if the Town will vote to appropriate an amount not to exceed \$50,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of completing an architectural and design study of the Town Hall for the renovation, including historic rehabilitation and restoration, of the building; or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from FY13 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town Hall is a significant historic asset of the Town. Adaptive reuse of the building, including historic rehabilitation and restoration, is a

long term goal of the Board of Selectman. Town Meeting has previously approved allocating CPA funds to the historic restoration of the building's second floor windows. The study funded by this article will identify needed repairs to the building as it is currently used, and make recommendations for maximizing the utility of the building to the Town going forward over the next several decades, providing cost estimates for any work proposed. Any resulting project proposal would be eligible for CPA historic funds to the extent covered by statutory requirements, and would require the approval of a future Town Meeting. Restoration of Town Halls is a very popular use of CPA funds across the Commonwealth, and has been an identified CPA project in Sudbury since adoption of the Act.

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

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

**ARTICLE 25. COMMUNITY PRESERVATION FUND – TOWN CENTER
LANDSCAPING RESTORATION**

To see if the Town will vote to appropriate an amount not to exceed \$200,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for landscaping restoration as part of the Town Center intersection project; or act on anything relative thereto. All appropriations will be allocated equally to the Open Space and Historic category and funded from FY13 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the historic landscaping and restoration for the construction phase of the Town Center intersection project. The construction estimate prepared by the Town's engineering consulting firm is \$1,870,000, of which \$200,000 is considered enhancements to the historical landscape above and beyond the basic landscaping in the project, and qualifies for CPA funding. These items include landscaping, stone wall construction, decorative walkways, ornamental lighting, and other site improvements to enhance the historic nature and open space qualities of the area, as well as the assistance of a Landscape Architect to design the improvements. If the construction funds are not approved at the 2012 Annual Town Meeting and/or ballot, this article will be Indefinitely Postponed.

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 26. COMMUNITY PRESERVATION FUND – HISTORIC PROJECTS

To see if the Town will vote to appropriate an amount not to exceed \$67,000 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: install a fire suppression system at the Hosmer House; restore timbers and wooden gate at the Town Pound; and survey no less than ten (10) Old Homes as directed by the Massachusetts Historical Commission; or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from FY13 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation not to exceed \$67,000 to fund three projects in the historic category which have been identified as priority projects by the Sudbury Historical Commission. Two of the three projects are for restoration and stabilization, which will prevent further loss of the historic assets of the Town and alleviate potential public safety hazards. The fire suppression system would protect the Hosmer House, built in 1793, and the 400 + paintings in a rotating display there. The system would also provide a safety feature to patrons during open houses and community events. The work at the Town Pound will entail restoration of the 10" timbers on the top of the stone wall and restoration of the gate. The next phase of the Old Homes Survey, as required by the Massachusetts Historical Commission, will be undertaken as the third project in this group with 10 properties identified to be added to the Town's inventory. 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 recommends approval of this article.

ARTICLE 27. 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 FY13 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, based primarily on the neighborhood walkway planning initiative and 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, and recommends this sixth appropriation for this recreational use. 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 recommends approval of this article.

**ARTICLE 28. COMMUNITY PRESERVATION FUND –
TOWN CLERK HISTORIC DOCUMENT PRESERVATION**

To see if the Town will vote to appropriate an amount not to exceed \$106,000 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 FY13 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the third phase of an on-going project to restore and preserve 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 recommends approval of this article.

**ARTICLE 29. COMMUNITY PRESERVATION FUND –
SUDBURY HOUSING TRUST 10% ALLOCATION**

To see if the Town will vote to appropriate an amount not to exceed \$200,000 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 FY13 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 FY13 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 recommends approval of this article.

ARTICLE 30. COMMUNITY PRESERVATION FUND -
PANTRY BROOK FARM PRESERVATION RESTRICTION

To see if the Town will vote to appropriate a sum, as recommended by the Community Preservation Committee, for the purpose of purchasing development rights to 94 +/- acres of land known as the Pantry Brook Farm located on Concord Road (shown as Parcels 0200 and 0201 on Assessors Map E10) by the Town or another conservation organization, by the grant of an Agricultural Preservation Restriction or Conservation Restriction pursuant to M.G.L. c.184, s. 31-32; to see whether this sum shall be raised by borrowing, or otherwise, under the Community Preservation Act; and to appropriate a sum sufficient to pay the annual debt service from FY13 Community Preservation Fund Revenue including bond and note issuance expense; or act on anything relative thereto. All appropriations will be allocated to the Open Space category and funded from unrestricted reserves.

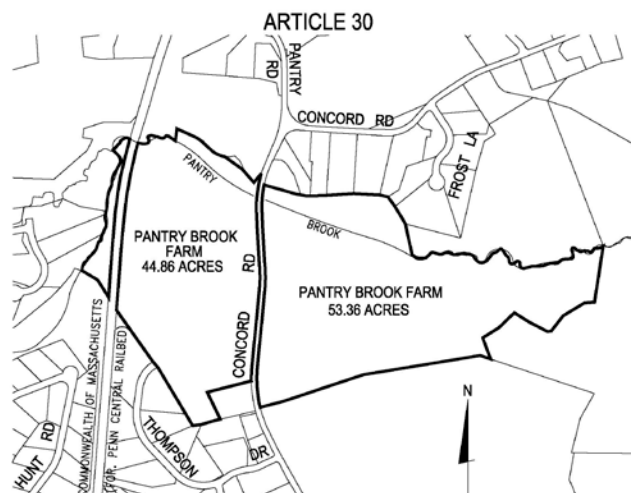
Submitted by the Community Preservation Committee.

(Two-thirds vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the purchase of a restriction on the Pantry Brook Farm, comprising approximately 94 acres of land on both sides of Concord Road just north of the Lincoln-Sudbury Regional High School. The farm encompasses approximately 45 acres of land on the west side of Concord Road, and approximately 55 acres on the east side. Six (6) of the 45 acres on the west side of the road, which include the old farm house and barns, will not be encumbered by this restriction; however, the owners will be working with Historic New England to preserve those features in a separate restriction. This article contemplates purchasing a restriction on the undeveloped portions of the property which will prevent future development of the parcel. The land will remain in private ownership and be farmed, or left undeveloped, in perpetuity. The preservation restriction will preclude non-agricultural development, tightly restrict and control allowable land uses, and afford limited public access to the property. The farm abuts land owned by the State of Massachusetts Division of Fisheries and Wildlife on the east side. This property is listed as the highest priority parcel for preservation in the 2009 Open Space and Recreation Plan, and a priority Heritage Landscape in the 2006 Heritage Landscape Inventory Report.

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 31. COMMUNITY PRESERVATION FUND –
PURCHASE AND RESTORE PROPERTY, 15 HUDSON ROAD**

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 in fee simple the property located at 15 Hudson Road containing approximately one acre of land (shown as Parcel 0003 on Assessors Map H09), and demolition of the structure thereon, subject to all rights and easements, to be used for historic, recreation or open space purposes allowable under the Community Preservation Act; to see whether this sum shall be raised by borrowing, or otherwise, under the Community Preservation Act; and to appropriate a sum sufficient to pay the annual debt service from FY13 Community Preservation Fund Revenue including bond and note issuance expense; or act on anything relative thereto. All appropriations will be allocated equally to the Open Space and Historic categories and funded from unrestricted reserves.

Submitted by the Community Preservation Committee.

(Two-thirds vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town has the opportunity to purchase property at 15 Hudson Road (Lot H09-Parcel 0003) located in the Town Center. The lot is comprised of a .998 acre parcel on which stands a circa 1938 single family residence. The property, flanked by Grinnell Park to the east and the Village Green commercial center to the west, is an integral component of the Town Center Historic District, designated a National Register Historic District in 1976. If purchased, the Town could use this property for either historic or open space purposes. The existing structure is anticipated to be torn down due to its dilapidated condition. The property, once part of the first settlement of Sudbury, makes it worth purchasing to ensure that the essential character of the Town is preserved.

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 32. COMMUNITY PRESERVATION FUND –
AMEND ARTICLE 43 OF THE 2006 TOWN MEETING,
SUDBURY HOUSING AUTHORITY UNIT BUY-DOWN

To see if the Town will vote to amend Article 43 of the 2006 Annual Town Meeting which authorized the expenditure of \$360,000 for the purchase by the Sudbury Housing Authority of housing units within the Town for use as affordable rental residences, expending no more than \$90,000 on any one unit. The amendment seeks to increase the per-unit subsidy so that no more than \$180,000 per unit can be expended under this article, 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 raising the amount of subsidy for each unit of rental housing to convert market rate housing to affordable. Despite efforts over the last five years to purchase condominiums designated as affordable housing, as required by law in c.40B developments, the Sudbury Housing Authority has not been able to complete any purchases and there does not appear to be any likelihood that the original concept can be realized. Therefore, the Housing Authority seeks to increase the per unit cap to \$180,000 to create at least two affordable housing units. This price is similar to the subsidies used by the Sudbury Housing Trust in its successful Home Preservation Program.

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 –
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 FY13 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 FY13 CPA budget, including appropriations and reservations as required in connection with the administration of the CPA funds. The article appropriates funds for FY13 debt service obligations totaling \$1,171,498. These obligations arise from prior Town Meeting approval for the bonding of four projects: 1) purchase of the Dickson property utilizing the Open Space (\$15,304) and Historic Preservation (\$10,203) categories; 2) purchase of land and development rights as well as construction of a sports field on the Cutting property utilizing the Open Space (\$353,872) and Recreation (\$43,737) categories; 3) purchase of the Libby property utilizing the Open Space (\$203,238) category; and 4) purchase of development rights on the Nobscot Boy Scout Reservation phases I and II utilizing the Open Space (\$545,144) category.

The article also appropriates funds for administrative and operational expenses of the CPC in the amount of \$82,750. 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 \$102,000 based upon the revenue projection of

\$2,040,000 in FY13. 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 recommends approval of this article.

**ARTICLE 34. RESOLUTION (NON-BINDING): RAIL TRAIL –
CONCORD TOWN LINE TO UNION AVENUE**

To see if the Town will vote to advise the Selectmen to create a recreational rail trail more or less on the old rail right of way in Sudbury known as the Bruce Freeman Rail Trail (BFRT).

(A vote under this article is only as a non-binding resolution.)

Submitted by the Board of Selectmen.

BOARD OF SELECTMEN REPORT: The Board of Selectmen is asking residents of Sudbury if they support the overall development of the BFRT in Sudbury. The proposed BFRT in Sudbury would go on land leased from the State, starting from the Concord town line near the Frost Farm south to the end of the right of way west of Union Avenue near Station Road. More information on the proposed Sudbury section of the BFRT can be found on the Town's website www.sudbury.ma.us. Various studies have previously been approved by Town Meeting, but no final decisions have been made on whether Sudbury should spend significant time and resources to create this amenity.

An affirmative vote indicates that the citizens voting are in support of creating a recreation Rail Trail more or less on the old rail right of way known as the BFRT in Sudbury; however, a vote in favor is advisory only and does not require action by the Town.

**ARTICLE 35. RESOLUTION (NON-BINDING): RAIL TRAIL – 0.5 MILE PORTION,
RT. 117 (NORTH ROAD) AT DAVIS FIELD TO CONCORD TOWN LINE**

To see if the Town will vote to advise the Selectmen to move forward with designing a 0.5 mile segment of the Bruce Freeman Rail Trail (BFRT) in north Sudbury from Rt. 117 at Davis Field to the Concord Town border.

(A vote under this article is only as a non-binding resolution.)

Submitted by the Board of Selectmen.

BOARD OF SELECTMEN REPORT: The Board of Selectmen is asking residents of Sudbury if they support the design of a ½ mile segment of the overall BFRT in Sudbury. The proposed ½ mile segment would go on land, former rail bed, leased from the State, starting from the Concord town line near the Frost Farm/Cummings Business Park south to Route 117 (North Road), with parking for this trail segment at the Davis Recreational Field. The Friends of the Bruce Freeman Rail Trail have offered to donate approximately \$50,000 to pay for a preliminary design adhering to Massachusetts Department of Transportation (MassDOT) design guidelines for this segment of the larger trail. More information on the proposed Sudbury section of the BFRT can be found on the Town's website www.sudbury.ma.us. Various studies have previously been approved by Town Meeting but no final decisions have been made on whether Sudbury should spend significant time and resources to create this amenity.

An affirmative vote indicates that the citizens voting are in support of designing a 0.5 mile segment of the Bruce Freeman Rail Trail (BFRT) in north Sudbury from Rt. 117 at Davis Field to the Concord Town border; however, a vote in favor is advisory only and does not require action by the Town.

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 2012 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 23 Amend Bylaws, Art. V(F) – Stormwater Management Bylaw

It is the opinion of Town Counsel that, if the Zoning Bylaw amendments proposed in the following articles in the Warrant for the 2012 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 20 Amend Zoning Bylaw, Art. IX, Appendix A, B.6 – Update Definition of Agricultural Use

Article 21 Amend Zoning Bylaw, Art. IX, Section 2313 and Appendix A, C.1 –
Regulate Raising of Roosters

Article 22 Amend Zoning Bylaw, Art. IX, Section 5331 – Senior Residential Community

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 third day of April, 2012.

SELECTMEN OF SUDBURY:

Lawrence W. O'Brien

Robert C. Haarde

John C. Drobinski

PART II
FINANCE COMMITTEE SECTION

TABLE OF CONTENTS

FY13 SECTION OVERVIEW	FC-3
FINANCE COMMITTEE REPORT	FC-4
FY13 MONIED ARTICLES	FC-10
ESTIMATED IMPACT ON FY13 TAX BILL	FC-11
SUDBURY PUBLIC SCHOOLS SUPERINTENDENT’S REPORT	FC-12
LINCOLN-SUDBURY SUPERINTENDENT’S REPORT	FC-13
TOWN MANAGER’S REPORT.....	FC-16
SUMMARY OF FY10-FY13 BUDGET DATA	FC-18
SUDBURY PUBLIC SCHOOLS BUDGET SUMMARY	FC-20
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL BUDGET SUMMARY	FC-23
MINUTEMAN VOCATIONAL TECHNICAL SCHOOL DISTRICT	FC-27
TOWN SERVICES BUDGET SUMMARY	FC-28
GENERAL GOVERNMENT	FC-30
PUBLIC SAFETY	FC-31
PUBLIC WORKS.....	FC-31
HUMAN SERVICES	FC-32
CULTURE & RECREATION.....	FC-33
TOWN-WIDE OPERATING AND TRANSFER ACCOUNTS	FC-34
BENEFITS AND INSURANCE	FC-35
DEBT SERVICE	FC-36
CAPITAL SPENDING.....	FC-37
ENTERPRISE FUNDS	FC-41
COMMUNITY PRESERVATION FUND	FC-42
LONG-TERM DEBT INFORMATION.....	FC-43
TOWN DEBT SCHEDULE BY ISSUANCE DATE.....	FC-43
AUTHORIZED, BUT UNISSUED DEBT.....	FC-43
FY13 LONG-TERM DEBT SERVICE DETAIL.....	FC-44
L-S DEBT SCHEDULE BY ISSUANCE DATE.....	FC-45
CPF DEBT SCHEDULE BY ISSUANCE DATE.....	FC-46
APPENDICES.....	FC-48
APPENDIX I. BUDGET TERMS AND DEFINITIONS.....	FC-48
APPENDIX II. EMPLOYEE HEADCOUNT	FC-51
APPENDIX III. EMPLOYEE COMPENSATION OVER \$100K ^{1,2}	FC-52
APPENDIX IV. COLLECTIVE BARGAINING.....	FC-54
APPENDIX V. SALARY SCHEDULES & CLASSIFICATION PLANS	FC-55

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FY13 SECTION OVERVIEW

This represents the third year of the revised Finance Committee (“FinCom”) section of the Town Warrant (the “FC” pages). The objective of the changes implemented two years 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 2010, June 2011, June 2012 and June 2013 (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 the Massachusetts Department of Elementary and Secondary Education (“DESE”), 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 or DESE 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 as well as due to the differences in how regional vs. town school district budgets are required to be presented. 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 2013 ("FY13") budget – from July 1, 2012 through June 30, 2013 - and the related financial articles that will be presented to you at Town Meeting beginning on May 7th. We believe, above all, that 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 Sudbury Town Departments (the "Town"), the Sudbury Public School K-8 School System ("SPS"), and the Lincoln-Sudbury Regional High School ("LSRHS" or the "High School") and other entities 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 2011, the FinCom issued budget guidelines to the leaders of the three principal Sudbury cost centers - the Town, SPS and the High School. In preparation for the budget hearing process in February 2012, we asked each cost center to prepare two budget scenarios for FY13:

- A No Override Budget that allows for annual growth up to 2.5% 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 Staff (or roll-up) budget that assumes each cost center maintains the same service levels in FY13 as funded through their FY12 budgets.

For FY13, the majority of the labor contracts for our three principal cost centers are set to expire at the end of FY12 and are currently in negotiation. Given this fact, and while still recognizing that each cost center has certain unique characteristics, FinCom believed it important that a level of consistency exist in which all budget submissions were prepared. As a result, we asked each cost center to make the following assumptions when constructing their budget submissions:

- No cost of living increase ("COLA"s) when forecasting compensation costs for FY13;
- Normal salary steps given their current employee demographic;
- Estimates of expected health and benefit costs increases or decreases; and
- Estimates of utilities and, where applicable, transportation and special education cost increases or decreases.

In addition, from a longer term planning perspective, the conditions surrounding our collective revenue forecast are not expected to show much improvement given continued economic uncertainty. As a result,

consistent with revenue forecast assumptions, FinCom recommend that each cost center assume 2.5% annual budget growth over the next three fiscal years (FY13-FY15) for planning purposes.

Recommended No Override Budget

For FY13, we are recommending only a No Override Budget of approximately \$82.8 million at the time this warrant was prepared. The No Override Budget represents a tax increase of approximately 3% (\$327) on the average assessed home value of \$621,410 and a total increase in taxes of \$2,084,493 including new growth and commercial property taxes.

The No 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 FY13 No Override Budget represents a 2.5% increase in the operating budget for each cost center compared to the FY12 budget. The difference in growth between the property tax increase of 3% 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 FY12 are set forth below.

- Under Proposition 2 ½, the tax increase is limited to 2 ½% of the overall tax levy; for FY13, this increase is approximately \$1.6 million.
- New growth, the tax on new and upgraded properties, is estimated to generate \$400,000 of new revenue in addition to the allowed increase in the levy (bringing the total levy increase to approximately \$2 million or 3%), up slightly from an estimated \$350,000 estimated in FY12 budget; this number assumes a continued slow recovery in new home construction and renovation activity from the recent economic downturn.
- State aid revenue is estimated to decrease by approximately 3% from FY12 levels, resulting in a decrease of approximately \$239,000 (comprised of a reduction in State Aid to Sudbury and LSRHS of approximately \$159,000 and \$80,000, respectively). This projection is based on our best estimates leading at the time of publication of the warrant. To date, discussions regarding state aid from the state legislature are still evolving. Should new information be provided we will update our assumption for state aid heading into Town Meeting as we’ve done in previous years.
- Local receipts, primarily motor vehicle excise taxes and fees charged for certain town services, are expected to remain flat vs. forecast FY12 levels of approximately \$3.7 million.
- The annual school debt reimbursement represents aid from the State and is the same as FY12 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 FY12	BUDGET FY13	Increase/ (Decrease)	%
Tax Levy	69,007,532	71,092,025	2,084,493	3.02%
SBAB School Debt Reimbursement	1,681,224	1,681,224	0	0.00%
State Aid ^(a)	5,409,800	5,251,297	(158,503)	-2.93%
Local Receipts	3,657,000	3,657,000	0	0.00%
Sub-Total	79,755,556	81,681,546	1,925,990	2.41%
Prior Year Articles/Recoveries	300	0	(300)	-100.00%
Enterprise Funds	1,117,233	1,090,601	(26,632)	-2.38%
TOTAL REVENUE	80,873,089	82,772,147	1,899,058	2.35%

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

FY13 Savings from Healthcare Changes

The significant rate of growth in health insurance costs for current and retired employees over the past decade has placed significant pressure on municipal operating budgets. Historically, making changes to these plans has been constrained by the requirements of collective bargaining. Fortunately, changes negotiated in our labor contracts three years ago helped to decrease that rate of growth in healthcare from prior levels. This resulted in significant savings from prior budget levels for the Town and SPS as well as for the High School.

Heading into FY13, however, the Legislature provided municipalities with an important tool to continue to reign in the significant growth of healthcare costs and provide significant and immediate savings to local governments. On July 12, 2011, Governor Duval Patrick signed An Act Relative to Municipal Health Insurance which amends Massachusetts General Laws Chapter 32B. This legislation provided a mechanism for municipalities to move to the Group Insurance Commission (the "GIC") outside the collective bargaining process. Prior to this recent change in legislation, entry into the GIC was subject to approval by all labor unions. While there are many details to this new legislation, the highlights of the new law are as follows:

- Provides greater flexibility to local governments over their health insurance decisions;
- Preserves a role for labor in the process;
- Provides a process outside of collective bargaining for changes in co-pays, deductibles and other cost-sharing features only; changes in contribution rates are still subject to collective bargaining; and
- Savings are shared with subscribers who are most affected by changes.

The law requires that all Massachusetts municipalities do an assessment of their healthcare costs and compare it to benchmark plans provided by the GIC. The purpose of this exercise is to discover the maximum possible savings if a municipality offered insurance coverage under the GIC benchmark plan. Once done, the local process that municipalities follow to implement healthcare design changes is to choose one of two options, either (a) join the GIC, or (b) change local plans (adjust local plan co-pays, deductibles and/or other cost-sharing features) to bring them within 5% of the prescribed GIC benchmark.

In November 2011, the Board of Selectmen voted to accept the provisions of sections 21-23 of Chapter 32B of the General Laws. After following the prescribed process, the outcome for the Town and SPS was a decision to join the GIC. At the time this warrant was prepared, the year-over-year savings generated by joining the GIC are estimated at approximately \$1.1 million as compared to FY12 budget levels with

approximately \$0.7 million and \$0.4 million attributed to SPS and the Town, respectively. This projection will continue to be refined as new information and estimates regarding rates and employee enrollment are acquired. A new savings estimate for the Town and SPS may be provided heading into Town Meeting.

Similarly, the LSRHS School Committee embarked on a process to determine what changes to make to their health insurance coverage. The outcome of this process was for the School Committee to choose the second option: to drive savings by making change to the local plans offered by their current purchasing coalition, Minuteman Nashoba Health Group. By making these changes, year-over-year savings are estimated at approximately \$339,000, or a reduction of approximately 11%, as compared to the FY12 budget levels.

The Finance Committee commends the actions taken by the Town, SPS and the High School to implement these healthcare changes. While there is still much uncertainty heading into FY13, these savings go a long way to lessening any potential adverse impacts that might result from the constraints of operating within a No Override budget next year.

FY13 Impact of Out-of-District Special Education Costs

A key growth driver for the SPS and LSRHS budgets are special education costs. The provision of a free and appropriate education in the least restrictive environment for all students is a federal and state mandate; our two school districts continue to seek the most efficient means to effectively meet these requirements. Despite developing programs within our schools, a rising portion of these costs are not within the direct control of our two districts as a growing proportion of spending represents tuition and transportation for students who are required to attend schools outside of SPS and LSRHS, so called out-of-district placements. As compared to the FY12 budget, net special education expenses (excluding instruction) for LSRHS and SPS are forecasted to increase in FY13 by 33% (\$1.3 million) and 12% (\$0.4 million), respectively. The biggest driver of these increases are required costs for out-of-district placements. The Finance Committee remains concerned that the significant rise in these costs continues to put downward pressure on the remaining operating budgets of our two school systems.

In particular, the increase in Special Education costs at the High School is so large that it qualifies for an “Extraordinary Relief” provision that the state provides for school districts incurring over a 25% increase in Special Education costs within a single fiscal year. LSRHS is applying for Extraordinary Relief and could realize up to \$621,366 in incremental funding from the state. However, the amount for which the High School will be reimbursed by the state is dependent on a number of factors including, but not limited to, the total number of Massachusetts school districts that qualify for Extraordinary Relief and how far this special funding from the state can stretch to meet the districts’ needs. Funding decisions regarding Extraordinary Relief are not expected to be communicated by the state to school districts until sometime in April.

Override Budget

The FinCom is not recommending an Override budget at this point in time given the uncertain status of labor contract negotiations as well as the level of Extraordinary Relief funding that the High School receives from the state. Favorable contract settlements for FY13 and beyond will be the single most important factor in eliminating and/or reducing any FY13 projected deficit and potential future deficits in FY14 and FY15. While it is not possible to publicly comment on the status of negotiations given the constraints of collective bargaining, all Boards, Committees and Town officials understand the need to settle these contracts as economically as possible.

Closer to Town Meeting, the FinCom may consider proposed override scenarios based on particular needs and as additional information becomes available.

Conclusions

Within the context of what is still a difficult economic environment, and like many other communities across the Commonwealth, achieving a balanced budget in Sudbury is not without its challenges. Over the past several years, the Town's fiscal situation has been severely constrained by increases in the cost of wages and benefits 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. In fact, per pupil expenditures in the Sudbury Public Schools are well under the State average.

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.

Fortunately, changes negotiated in our labor contracts three years ago helped to decrease that rate of growth of growth in wages and benefits, particularly healthcare, significantly. These changes helped to lessen the collective impact of lower State Aid and non-property tax related revenues during the economic downturn. To be clear, layoffs and the elimination of services were still required in many areas to collectively allow us to balance our budget during the downturn. However, on a relative basis, Sudbury still fared better than many other communities in the Commonwealth during this time.

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 employee health insurance, enhanced cooperation among school administrations, and sharing of staff with neighboring communities to reduce overall costs. In addition to these cost initiatives, we support the Selectmen's on-going efforts to sustain and grow our commercial sector. 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 FY13 budget.

Respectfully yours,
Sudbury Finance Committee

Jim Rao, Chair
Joan Carlton
Jamie Gossels
Robert Jacobson
William Kneeland, Jr.

Doug Kohen
Mark Minassian
Robert Stein
Chuck Woodard

FY13 MONIED ARTICLES

<u>Article</u>	<u>Subject</u>	<u>Requested Amount</u>	<u>Finance Committee Recommendation</u>
2	FY12 Budget Adjustments	n/a	Report at Town Meeting
4	FY13 Operating Budget	\$80,413,671	Recommend approval
5	FY13 Capital Budget	\$552,421	Recommend approval
6	FY13 Transfer Station Enterprise Fund	\$297,461	Recommend approval
7	FY13 Pool Enterprise Fund	\$516,197	Recommend approval
8	FY13 Recreation Field Maintenance Enterprise Fund	\$276,943	Recommend approval
9	Unpaid Bills	n/a	Report at Town Meeting
10	Chapter 90 Highway Funding	n/a	Recommend approval
11	Real Estate Exemptions	n/a	Recommend approval
12	Town & School Revolving Funds	\$1,760,500	Recommend approval
14	Town Center Traffic Improvements	n/a	Report at Town Meeting
15	Fire Dept. Safety Equipment	n/a	Report at Town Meeting
17	Nixon Roof Replacement	n/a	Report at Town Meeting
18	Natatorium HVAC & Associated Roofing	n/a	Report at Town Meeting
19	Town and School Roofs	n/a	Report at Town Meeting
24	CPF: Town Hall Architecture & Design Study	\$50,000	Recommend approval
25	CPF: Town Center Landscaping & Restoration	n/a	Report at Town Meeting
26	CPF: Historic Projects	\$67,000	Recommend approval
27	CPF: Townwide Walkways	\$100,000	Recommend approval
28	CPF: Historic Document Preservation	\$106,000	Recommend approval
29	CPF: Sudbury Housing Trust 10% Allocation	\$200,000	Recommend approval
30	CPF: Pantry Brook Farm Preservation Restriction	n/a	Report at Town Meeting
31	CPF: Purchase & Restore 15 Hudson Rd.	n/a	Report at Town Meeting
33	CPF: General Budget & Appropriations	\$2,077,248	Recommend approval
<u>Exhibit Notes:</u>			
n/a = exact dollar amount not available at time of Town Warrant printing			

ESTIMATED IMPACT ON FY13 TAX BILL

ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2013 TAX BILL												
								AVG.				
Fiscal 2012 Values	100,000	200,000	300,000	400,000	500,000	600,000	621,410	700,000	800,000	900,000	1,000,000	
Fiscal 2012 Taxes	1,760	3,520	5,280	7,040	8,800	10,560	10,937	12,320	14,080	15,840	17,600	
Fiscal 2013 Taxes	1,813	3,625	5,438	7,251	9,063	10,876	11,264	12,689	14,501	16,314	18,127	
Fiscal 2013(Base)Taxes	1,704	3,408	5,113	6,817	8,521	10,225	10,590	11,930	13,634	15,338	17,042	
Debt Exemption	108	217	325	434	542	651	674	759	867	976	1,084	
	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	2.99%	
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	621,410	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	22,736	0.64	1.27	1.91	2.55	3.19	3.82	3.96	4.46	5.10	5.74	6.37
50,000	45,472	1.27	2.55	3.82	5.10	6.37	7.65	7.92	8.92	10.20	11.47	12.75
75,000	68,208	1.91	3.82	5.74	7.65	9.56	11.47	11.88	13.39	15.30	17.21	19.12
100,000	90,944	2.55	5.10	7.65	10.20	12.75	15.30	15.84	17.85	20.40	22.95	25.50
200,000	181,888	5.10	10.20	15.30	20.40	25.50	30.60	31.69	35.70	40.80	45.90	51.00
300,000	272,833	7.65	15.30	22.95	30.60	38.25	45.90	47.53	53.54	61.19	68.84	76.49
400,000	363,777	10.20	20.40	30.60	40.80	51.00	61.19	63.38	71.39	81.59	91.79	101.99
500,000	454,721	12.75	25.50	38.25	51.00	63.74	76.49	79.22	89.24	101.99	114.74	127.49
600,000	545,665	15.30	30.60	45.90	61.19	76.49	91.79	95.07	107.09	122.39	137.69	152.99
700,000	636,609	17.85	35.70	53.54	71.39	89.24	107.09	110.91	124.94	142.79	160.63	178.48
800,000	727,554	20.40	40.80	61.19	81.59	101.99	122.39	126.76	142.79	163.18	183.58	203.98
900,000	818,498	22.95	45.90	68.84	91.79	114.74	137.69	142.60	160.63	183.58	206.53	229.48
1,000,000	909,442	25.50	51.00	76.49	101.99	127.49	152.99	158.44	178.48	203.98	229.48	254.98
2,000,000	1,818,884	51.00	101.99	152.99	203.98	254.98	305.97	316.89	356.97	407.96	458.96	509.95
3,000,000	2,728,326	76.49	152.99	229.48	305.97	382.46	458.96	475.33	535.45	611.94	688.43	764.93
4,000,000	3,637,768	101.99	203.98	305.97	407.96	509.95	611.94	633.78	713.93	815.92	917.91	1,019.90

SUDBURY PUBLIC SCHOOLS SUPERINTENDENT'S REPORT

The FY13 No Override budget, projected to be 2.5% greater than FY12 budget, will be the fifth consecutive year with year over year budget growth at or below 2.5%. Over the past several years, layoffs, elimination of services, significant employee compensation concessions and the infusion of federal stimulus revenues allowed us to balance our budget during the economic downturn. Unfortunately, federal stimulus revenues will be non-existent for FY 13 and we have had to make decisions that allow us to move forward and continue to provide a quality education for all students while also responding to new mandates without the benefit of additional state or federal funding. The SPS administration along with the School Committee developed a budget that is responsive to the needs of our students and our obligations to comply with mandates to align our curriculum to the Common Core and to implement a new Educator Evaluation System.

The FY13 No Override budget that is presented in this warrant totals \$36,292,760, an increase of \$885,189 over the current year. This budget reflects all state and local revenue sources remaining flat compared to the current year. This assumption, as well as others, remains somewhat fluid and uncertain at this point in time. We anticipate that this fluidity may continue up until Town Meeting. Not considering potential savings from the recent change in health benefits, the FY13 No Override budget falls \$248,290 short of allowing us to maintain our service level of FY12 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 \$248,290 gap.

The loss of federal stimulus funds means that we have lost the flexibility we had over the past few years to respond to unexpected enrollment increases and to provide a consistent and meaningful level of professional development for our faculty and administrators. We have laid off staff over the past several years and we now depend on consultants and contracted services providers to deliver services and provide support and professional development that was previously provided for "in-house." This strategy has not enabled us to build adequate capacity within the system for developing and implementing educational initiatives, responding to the multiple mandates for which we are responsible, and the overall operation of the organization. The FY13 budget includes minimal steps toward building system capacity in the area of Teaching and Learning and begins to address identified needs through the inclusion of 2.0 FTE Mathematics Instructional Coaches.

Uncertainty exists in that we have begun the process of collective bargaining, the outcome of which will also impact the FY13 budget. In addition, 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 support and custodial staff have been cut to a minimum. Finally, due to the change in Town Health Benefits to the Group Insurance Commission (GIC), we anticipate savings that may impact our budget shortfall; however, we will not know exact savings information until the enrollment period for benefits has been completed.

Our enrollment directly impacts our budget planning and SPS enrollment is projected to decline in FY13 by approximately 101 students (3.29%), specifically impacting the pre-K – 5 program. However, our middle school (grades 6-8) enrollment remains consistent for FY13. All three grade levels at the middle school have enrollments in excess of 300 (6th-354, 7th-325, 8th-393) students while our incoming Kindergarten class was 260 for FY 12 and is projected to be approximately 240 for FY13. The uncertainty of the housing market and the number of homes "on the market" provides an additional factor which impacts our ability to plan in a programmatically and fiscally responsible manner. Our enrollment projections for FY13, while addressing factors that are known to us, allow for very little flexibility if we should experience an influx of school aged children. Therefore, if there is even a modest increase in student population, we will need to add class sections/FTEs if we are to remain within reasonable proximity to the class size guidelines established. Over the past two years, we utilized federal stimulus funds that became available to open additional classrooms

just before or soon after school had already started. There will be no federal stimulus funds available in FY13.

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. Over the past few years we have 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. At this time, we project our total net special education expenses will be 11.67% higher in FY13 than FY12. This category of expenditure has been growing nearly 10% per year in the past several budgets. Because special education accounts for nearly 27% of our operating budget, we are continually seeking every efficiency and economy possible while maintaining a quality, mandated level of service.

The SPS School Committee and administration seek to provide all Sudbury students with an exceptional educational experience, in a safe environment, that allows them to reach their academic and personal goals and become educated, confident, well-rounded, and thoughtful contributors in our society. We will continue to offer leadership to achieve these goals in a fiscally responsible manner.

Respectfully yours,
Dr. Anne S. Wilson

LINCOLN-SUDBURY SUPERINTENDENT'S REPORT

Dear Resident of Sudbury,

The daily practices of Lincoln-Sudbury are guided by its Core Values – fostering cooperative and caring relationships, respecting human differences, and developing and maintaining a purposeful and rigorous academic program. Our students find support through strong student-teacher relationships. Our school culture minimizes distractions from learning by promoting physical and emotional safety for all. We value diversity both in the faces of our learning community and in the ideas they express. We strive for a rich and vibrant program during the school day and in the enrichment opportunities afforded our students outside of school. Our Core Values make Lincoln-Sudbury the outstanding high school it is, and the continuing negative effects of this economic downturn are eroding our ability to maintain this excellence.

The costs of running and maintaining a high school of Lincoln-Sudbury's caliber have outpaced the revenues that Sudbury can generate under the limitations of Proposition 2 ½. Despite the impacts of five years of staff reductions, Lincoln-Sudbury remains a great high school. The outcomes realized by our graduates remain statistically unchanged, but the learning experiences students face day-to-day have appreciably shifted. Class sizes continue to increase and are higher than the state average. Elevated teacher loads now limit our teachers' ability to personalize learning and provide students the level of supports once a hallmark of Lincoln-Sudbury. The layoffs have also reduced the curricular breadth, diminishing the richness and variety previously available to students.

Results matter -- twelve percent (45 students) of the graduating Class of 2011 were commended as part of the National Merit Scholarship Program (compared to 3% nationally). Ninety-two percent of last year's senior class headed off to college, with some matriculating into a number of our country's most prestigious schools. Lincoln-Sudbury has long been known for its diverse and vibrant offerings in the humanities, but it is also a school from which one third of its graduates reported in this year's Alumni Survey as majoring in STEM fields (Science and medicine, Technology, Engineering, and Math) in college. Whether heading off to pursue STEM, the humanities, business, or other studies, the "approval ratings" of our alumni speak to the

quality of a Lincoln-Sudbury education, where 93% of our alumni rated the overall quality of L-S as excellent or good, with the vast majority rating their experience as *excellent*. Children in our preschools and our K-8 systems deserve the same opportunities and results that our alumni have experienced, and your financial support is needed to ensure this happens.

During the 2011-2012 academic year, the high school administration allocated staffing resources to enable the Guidance/Counseling Department to implement *Naviance*, a web-based software program that enables students and families to more easily research colleges and file applications online. *Naviance* allows students to explore career interests, to establish post-secondary goals, and can guide them towards the college best suited for their wants and aspirations. Implementing *Naviance* has also saved the high school thousands of dollars by eliminating virtually all of the postage costs incurred with the college admissions process.

There has been a slight decrease (2.5%) in enrollment at Lincoln-Sudbury over the past four years, and we expect our enrollment to be 1,587 when students walk through our doors for the beginning of the 2012-13 school year. While the decline in enrollment in recent years has been negligible, the reduction in staffing that has occurred during this economic downturn has been significant. Over the past four years the high school has reduced 13.33 FTE of teachers and administrators, and we have cut 5.08 FTE of support staff. This year's No Override Budget finds the high school laying-off staff for the fifth consecutive year. As many as 7.9 FTE will be cut from the high school in the FY13 budget, potentially leaving the school staffing 26.31 FTE (or 14%) smaller than when these layoffs began five years ago.

The Lincoln-Sudbury School Committee and teachers have been collectively working to control costs. The Committee acted on new Massachusetts's legislation and implemented changes that significantly limit the rising costs of health insurance. The insurance consultants EBS Foran were contracted to analyze the budgetary impact of moving to the Massachusetts Group Insurance Commission (GIC) or adopting GIC-like plans from a range of other health insurance providers, including Minuteman Nashoba Health Group (MNHG). After much deliberation over the unknowns of the GIC and the known and highly competitive rates offered by MNHG that were well-within the legislation's requirements for health plan redesign, MNHG was the appropriate decision for health insurance for the district. In addition to cost savings for implementing GIC-like health plan designs, the Lincoln-Sudbury School Committee engaged the Teachers' Association in negotiations related to health insurance through the collective bargaining process.

The health insurance agreement reached with the Teachers' Association continues to hold contribution rates for all plans, except the more expensive indemnity (PPO/POS) plans, to a 70%-30% employer-employee split. Through collective bargaining, the teachers accepted that employees who chose to change their health plan and enroll in costly indemnity plans, as well as new hires enrolling in such plans, will increase their employee contribution to 40% in FY13 and 49% in FY14 and thereafter. This concession from our teachers on indemnity plans will help the district avoid costs long into the future.

Collective bargaining with our teachers also allowed the district to eliminate an incentive clause in the current contract that annually rewarded employees for choosing more affordable health plans. Over the past three years, this incentive clause paid-off by moving a significant number of employees from more costly insurance plans to plans that were more affordable for the district. In its place, a one-year, one-time only incentive will now be offered to encourage employees not currently on the least expensive health plans to make this cost-saving choice.

Under the legislation, health plan design changes implemented by the district require the school to provide a mitigation plan to help offset the increased co-pays and deductibles that employees will now shoulder under GIC-like health plans. The agreement with the Teachers' Association provides for a one-time mitigation of \$100,859 that will be put into a Health Reimbursement Account.

The impact of the negotiated GIC-like health plans is partly reflected in the insurance line of the Lincoln-Sudbury budget, which is \$339,075 less than FY12. The FY13 cost avoidance from this health plan design change is \$222,708, with a projected additional \$214,373 in cost avoidance to be realized in FY14 under projected rate increase assumptions.

For the second year in a row, Lincoln-Sudbury's largest budget driver is the rising cost of mandated out-of-district tuitions and the transportation to these placements for students with profound learning needs. The number of out-of-district placements increased from 39 students in FY11, to the current 50 students out-placed, and will increase to at least 64 students in FY13. Simply put, Lincoln-Sudbury cannot maintain level-services for the 1,600 students educated within the walls of the high school when the costs of these outplacements far exceeds the 2.5% No Override budget increase.

The cost of out-of-district placements has increased \$1,176,909 in FY12 over the FY11 budget for these placements and will increase another \$706,062 in FY13 over FY12. Included in this FY12 increase are placement costs for a number of students whose learning needs require outplacements but were unexpected because the student had not been within our feeder K-8 systems' ranks. These unexpected placements have stressed Lincoln-Sudbury's budget, and have the high school running a \$438,021 deficit for FY12. The State has "extraordinary relief" provisions for school districts incurring over a 25% increase in Special Education costs within a single fiscal year. Lincoln-Sudbury has far exceeded the 25% threshold and is applying for this extraordinary relief. Lincoln-Sudbury could realize up to \$621,366 in extraordinary relief; however, the extent to which the high school will be reimbursed by the State will depend on how many other Massachusetts school districts qualify and how far this special funding from the State can stretch to meet the districts' needs. Lincoln-Sudbury will not know how much extraordinary relief it will receive from the State until sometime in April.

If the high school realizes the full \$621,366 in extraordinary relief, it will be able to fully cover the FY12 operating deficit and will be able use Circuit Breaker to rollover \$173,345 towards FY13. This would reduce the staffing layoffs required at the high school to meet the No Override budget from a loss of 7.9 FTE to 5.23 FTE but will not fully mitigate potential layoffs that will impact L-S students during the 2012-2013 school year. If the high school realizes less than \$438,021 in extraordinary relief, the high school will need to use funding from our Excess & Deficiency account to stabilize the FY12 budget, but using these funds compromises the long-term fiscal strength of the high school.

A No Override Budget represents a 2.5% increase in the operating budget over FY12, excluding debt service. This No Override Budget continues the worrisome trend of teacher layoffs for a fifth consecutive year. Every effort has been made to preserve teachers and counselors when developing No Override budgets. Department budgets are 30% less than what they were five years ago. This drastic reduction in department budgets only defers needs that should be addressed, as computer technology and some textbooks used at L-S become increasingly obsolete. The Lincoln-Sudbury School Committee is currently engaged with the Teachers' Association in collective bargaining for the next contract. Clearly, sustaining staffing and maintaining the curricular excellence of the high school need to be the central focus in the negotiations.

Results matter. My hope for our high school students and for those who will attend L-S in the future, including my own elementary-age children in Sudbury, is that our community won't wait for the results to dip before enough residents are willing to step forward and support an excellent education for all children.

Respectfully yours,
Scott Carpenter
Superintendent/Principal

TOWN MANAGER'S REPORT

Dear Resident of Sudbury,

This Finance Committee recommended FY13 budget for the municipal government increases 2.5% (approximately \$464,828, net after offsets) over the FY12 budget. Initially, this level of budget is \$120,482 short of what it would take to provide the same level of services as the FY12 budget provided, but it is likely that cost savings in other areas may address that by the time of Town Meeting.

As of July 1, 2012, all Town and Sudbury Public Schools employees will obtain their health insurance through the program offered by the State government – the Group Insurance Commission (GIC). A new state statute, M.G.L. c.32B, s.21-23, provided for a streamlined bargaining process for towns and cities to either change their own health insurance to match a benchmark GIC plan, or, if the savings were higher, to join the GIC, without unions being able to veto the change. After analysis of alternatives, the Sudbury Board of Selectmen voted to begin the bargaining process leading to joining the GIC. This bargaining successfully concluded in early February after reaching an agreement with the Sudbury Public Employee Committee (PEC) on what first year only mitigation would be paid to the employees and retirees for moving to the GIC.

It is not clear at the time of writing this report what the final savings will be for the town government or SPS as a result of making this change, but conservative estimates of savings after mitigation payments range from \$300,000 - \$400,000 for the Town government and \$575,000 - \$815,000 for SPS in FY13. The open enrollment period for Town and SPS employees to make choices on their specific health plan closes on May 7, and it is those decisions that will affect final costs.

Savings on the Town side will likely first be used to cover reductions that would have been made if there had not been changes in health insurance. And the Town has begun the collective bargaining process with its unions for the FY13 and no other money has been set aside to fund any agreements that might be reached.

A second major initiative for FY13 is the combining of the now separate fire department dispatch function with the police department dispatch function to create a combined public safety dispatch unit and locate it in the Police Department. As background, Sudbury employs civilian dispatchers to perform this increasingly complex function, but unlike most towns, we have not yet moved to a combined dispatch. There are serious drawbacks in our current separate arrangement. Perhaps most critical is that 911 calls from landlines in Sudbury first go to the Sudbury Police Department. If the emergency requires a response from the Sudbury Fire Department, the call must then be transferred to a different dispatcher in a different building. This causes a delay in response and a need for callers to explain their emergency at least twice. (*NOTE: if the 911 call is made from a cell phone, the call first goes to the state police, who then transfers it to the Sudbury Police, and it may get transferred a 3rd time to the Fire Department*). Towns which have created combined dispatch, such as Concord, Wayland, Lincoln, and most others in our area, instead have one dispatch center and both fire and police staff and apparatus are handled without the need for a phone transfer. The decision to move to this preferred model for dispatch operations in Sudbury comes at this time due to a new State regulation, effective July 1, 2012, requiring Towns to provide a higher level of dispatch response, known as Emergency Medical Dispatch (EMD). EMD involves a public safety dispatcher providing pre-ambulance arrival instructions such as CPR over the phone. This is an important increase in service the Town can provide for residents, and the creation of the combined dispatch in the Police Station is the best structure for increasing the effectiveness and capacity of public safety dispatching in Sudbury.

To create this new combined dispatch operation in the Police Department, the Town will be hiring one more civilian dispatcher in FY13, bringing the total number of civilian dispatchers to 7.5 as well as replacing outdated dispatch related equipment. Residents will be asked, as part of Article 5, the Capital Budget, to

approve funds to upgrade equipment in the Police Department as well as the Fire Department so that public safety dispatchers can immediately reach and dispatch personnel whether they are at one of the three fire stations or on the road in a police department or fire department vehicle.

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. For example, we are in the third year of sharing a Recreation Director with Wayland and in FY12 added to this arrangement by sharing two more staff positions: a Program Coordinator and Assistant Program Coordinator. We have found additional savings to Sudbury of approximately \$85,000 by this further sharing of staff with Wayland. Due to the expertise and top notch staffing in this area, sharing has worked very well and we continue to offer a high level of recreation services to the public.

In another area of regionalism, Sudbury received an award from the Massachusetts Municipal Association (MMA) for another regional effort we host: the Regional Housing Services Office (RHSO). Sudbury is the lead town in an innovative effort to help preserve the status of existing affordable housing units in five other towns – Bedford, Concord, Lincoln, Lexington, and Weston. These towns purchase hours from Sudbury to assist them in this very technical area, and each town is able to have access to Sudbury's expertise. As we approach the second year of the program, a number of other towns, recognizing this as a very cost effective way of meeting their obligations, have asked to join the RHSO, but it is important to not grow beyond the capacity of the RHSO to provide this service. Meanwhile the Metropolitan Area Planning Commission is studying the RHSO to evaluate if it can be replicated elsewhere to meet the needs of other towns that can't be accommodated within the Sudbury RHSO.

We will continue to evaluate service by service if outsourcing work to private vendors or regionalizing services is a more cost effective approach in some areas. It should be viewed with skepticism the premise that outsourcing or regionalization or other consolidation is always more efficient. 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. Preliminary analysis shows, however, that Sudbury's costs might go up if we joined a regional dispatch center, because costs are usually assessed among towns based on population, and as one of the largest towns in the study, we would likely be expected to contribute more than we spend right now for dispatching services. Our current dispatching costs per capita are lower than nearly all the other towns in the study. These are important issues that must be carefully addressed and the devil is always in the details, not in the broad initial concept.

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 FY10-FY13 BUDGET DATA

EXPENDITURES	FY10 Actual	FY11 Actual	FY12 Appropriated	FY13 No Override
LS Gross Assessment	16,854,852	17,011,347	17,333,368	18,322,487
LS Offsets/Re-apportionments	(3,192,298)	(2,640,344)	(2,760,082)	(2,596,792)
LS Employee Benefits Assessment	3,142,491	3,206,376	3,506,669	3,121,829
LS E&D Fund Assessment	-	-	-	-
LSRHS NET (Operating Assessment)	16,805,045	17,577,379	18,079,955	18,847,524
SPS Gross Expenses	27,815,697	30,763,680	31,576,569	31,971,896
SPS Offsets	-	(2,480,863)	(2,841,775)	(2,775,371)
SPS Employee Benefits & Insurances	6,204,274	6,032,762	6,629,690	6,400,242
SPS Employee Benefits Reserve	-	-	43,087	695,993
SPS NET	34,019,971	34,315,578	35,407,571	36,292,760
Minuteman Regional Assessment	298,098	195,498	321,590	274,416
Other Regional School Assessments	-	-	-	-
Total: Schools	51,123,114	52,088,455	53,809,116	55,414,700
General Government	2,207,011	2,244,846	2,325,635	2,383,917
Public Safety	6,297,069	6,554,642	7,016,935	7,244,389
Public Works	3,364,252	3,446,462	3,304,146	3,390,044
Human Services	520,208	507,899	534,239	543,789
Culture & Recreation	1,112,286	1,148,014	1,166,009	1,125,243
Unclassified & Transfer Accounts	106,619	118,700	401,148	392,925
Town Employee Benefits & Insurances	3,964,802	4,231,089	4,465,977	4,451,774
Town Employee Benefits Reserve	-	-	24,725	374,765
subtotal, town services	17,572,248	18,251,652	19,238,813	19,906,847
Town Operating Offsets	(412,553)	(458,684)	(645,738)	(848,944)
Total: Town Departments	17,159,695	17,792,968	18,593,075	19,057,903
Capital Operating Budget	523,383	529,054	538,947	552,421
Capital Exclusions	-	-	-	-
Total: Capital Budget	523,383	529,054	538,947	552,421
Subtotal: Operating Budget	68,806,192	70,410,477	72,941,138	75,025,023
Town Debt Service	4,269,224	4,180,354	3,883,860	3,798,521
LSRHS (Debt Assessment)	2,298,949	2,237,147	2,193,072	2,142,548
Total: Debt Budget	6,568,173	6,417,501	6,076,932	5,941,069
Enterprise Fund Expenditures (Direct)	825,257	897,094	1,117,234	1,090,601
Stabilization Fund	-	-	-	-
Total: Other Funds	825,257	897,094	1,117,234	1,090,601
Prior Year Articles/Recoveries	-	-	300	-
Other Charges to be raised	730,246	662,842	737,485	715,454
Total: Other To Be Raised	76,929,867	78,387,914	80,873,089	82,772,147

RECEIPTS				
State Aid (Cherry Sheet)	5,580,961	5,491,075	5,409,800	5,251,297
SBAB School Debt Reimbursement	1,702,597	1,702,597	1,681,224	1,681,224
Local Receipts	3,734,780	3,975,554	3,657,000	3,657,000
Free Cash	-	-	-	-
Retirement Trust Fund	-	-	-	-
Abatement Surplus	321,000	-	-	-
Prior Year Articles/Recoveries	-	-	300	-
Enterprise Funds (net offsets)	942,286	1,002,125	1,117,233	1,090,601
Total: State & Local Receipts	12,281,624	12,171,352	11,865,557	11,680,122
Tax Levy	65,529,152	67,418,506	69,007,532	71,092,025
Total: Revenue	77,810,776	79,589,858	80,873,089	82,772,147

UNDER/ (OVER)	880,909	1,201,944	1	(0)
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RECOMMENDED FY13 BUDGETS

	FY12	FY13	FY13
ALL LINE ITEMS - ALL FUNDS*	Appropriated	No Override	% of Budget
Lincoln-Sudbury Regional High School	18,079,955	18,847,524	22.8%
Sudbury Public Schools	35,407,571	36,292,760	43.8%
Minuteman and other Voc Schools	321,590	274,416	0.3%
Town Departments	18,593,075	19,057,903	23.0%
Debt Service - Town, SPS and LSRHS	6,076,932	5,941,069	7.2%
Transfer Station Enterprise Fund	290,389	297,461	0.4%
Atkinson Pool Enterprise Fund	517,230	516,197	0.6%
Field Maintenance Enterprise Fund	309,614	276,943	0.3%
Capital Items	538,947	552,421	0.7%
Stabilization Fund	-	-	0.0%
State and Local Charges	737,785	715,454	0.9%
Total Budget*	80,873,089	82,772,147	100.0%
* Total budget reporting includes all cost centers and all funds to be Budget or expended, except for revolving funds.			
	-	-	
	FY12	FY13	FY13
OPERATING BUDGET*	Appropriated	No Override	% of Total
Lincoln-Sudbury Regional High School	18,079,955	18,847,524	25.1%
Sudbury Public Schools	35,407,571	36,292,760	48.4%
Minuteman and other Voc Schools	321,590	274,416	0.4%
Town Departments	18,593,075	19,057,903	25.4%
Capital Items	538,947	552,421	0.7%
Total Operating Budget*	72,941,138	75,025,023	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

	FY10 Actual	FY11 Actual	FY12 Appropriated	FY13 Non Override
Salaries & Other Cash Compensation (Steps Only)				
Administration	\$ 876,389	\$ 921,614	\$ 910,497	\$ 983,000
Elementary Instruction	8,906,003	9,196,613	9,953,425	9,980,257
Middle School Instruction	4,966,011	4,941,712	5,242,544	5,456,942
Curriculum/Instr/Technology	465,558	496,571	569,362	693,540
Special Ed Instruction	4,812,494	4,830,086	5,253,624	5,344,081
Health, Transportation & Food Service	665,718	639,550	649,534	357,808
Plant Maintenance	780,895	777,787	883,906	905,238
All Other	572,051	551,653	614,263	614,263
Non-Override Reduction				(248,291)
Total Salaries & Other Cash Compensation	\$ 22,045,119	\$ 22,355,586	\$ 24,077,155	\$ 24,086,838
Expenses				
Administration	\$ 561,065	\$ 637,266	\$ 303,762	\$ 312,875
Elementary Instruction	350,672	448,722	331,513	341,460
Middle School Instruction	147,667	247,774	174,614	179,853
Curriculum/Instr/Technology	261,160	315,033	329,787	339,679
Special Ed Instruction	4,206,325	3,906,945	3,621,118	4,043,830
Health, Transportation & Food Service	1,060,289	1,000,599	1,092,098	1,007,203
Utilities	932,320	973,580	1,191,882	1,191,882
Plant Maintenance	670,097	898,645	454,640	468,276
Non-Override Reduction				
Total Expenses	\$ 8,189,595	\$ 8,428,564	\$ 7,499,414	\$ 7,885,058
Subtotal before Benefits	\$ 30,234,714	\$ 30,784,150	\$ 31,576,569	\$ 31,971,896
Healthcare Benefits				
Active Employees	\$ 4,109,248	\$ 3,795,389	\$ 4,121,532	\$ 4,507,609
Retired Employees	487,618	550,413	636,315	632,931
Total Healthcare Benefits	\$ 4,596,866	\$ 4,345,802	\$ 4,757,847	\$ 5,140,540
Retirement & Other Benefits				
Active Employees	\$ 438,720	\$ 521,363	\$ 657,886	\$ 665,624
Retirement Assessment	1,168,688	1,170,452	1,257,044	1,290,071
Total Retirement & Other Benefits	\$ 1,607,408	\$ 1,691,815	\$ 1,914,930	\$ 1,955,695
Total Benefits	\$ 6,204,274	\$ 6,037,617	\$ 6,672,777	\$ 7,096,235
Total SPS Operating Expenses	\$ 36,438,988	\$ 36,821,767	\$ 38,249,346	\$ 39,068,130
SPS Grants, Fees & Other Offsets	\$ (2,419,017)	\$ (2,480,863)	\$ (2,841,775)	\$ (2,775,370)
Net SPS Operating Expenses	\$ 34,019,971	\$ 34,340,904	\$ 35,407,571	\$ 36,292,760
Total Compensation (salaries, other cash compensation & benefits) as a percentage of Operating Expenses (<u>before</u> Offsets)	77.53%	77.11%	80.39%	79.82%
Students:				
Sudbury (Pre-K - 8)	3,100	3,033	3,004	2,913
Metco	65	60	70	70
Other Out of District Students at SPS	28	33	39	34
Total	3,193	3,126	3,113	3,017
Cost per Student (Operating Expenses <u>before</u> Offsets divided by number of Students)	\$ 11,412	\$ 11,779	\$ 12,287	\$ 12,949

	FY10 Actual	FY11 Actual	FY12 Appropriated	FY13 Non Override
Headcount (FTEs)				
Administrators	16.00	15.00	16.50	17.50
Administrative Support	15.00	15.70	15.20	15.20
Teachers (excl SPED)	190.33	188.71	189.86	182.36
Classroom & Teaching Support (excl SPED)	22.37	24.40	21.50	21.50
SPED Teachers	52.90	55.30	57.30	57.30
SPED Support	49.30	44.20	40.45	40.45
Metco	3.60	5.40	5.40	5.40
Custodial/Grounds/Maintenance	16.00	15.00	15.00	15.00
All Other	27.81	26.86	18.00	17.50
Non-Override Reduction				
Total FTEs	393.31	390.57	379.21	372.21
Part Time Employees receiving benefits	35	35	30	30
Retirees receiving Full Healthcare benefits	47	42	43	43
Retirees receiving Medicare Supplemental benefits	141	151	161	161
Average Class Size				
Haynes	19.3	21.4	19.9	21.1
Loring	20.9	20.6	21.8	22.6
Nixon	21.1	21.7	20.4	21.9
Noyes	20.9	20.2	21.4	22.0
Curtis	23.2	23.2	22.0	23.4
Average Salaries				
Teachers	\$ 64,771	\$ 67,017	\$ 69,041	\$ 72,162
Administration	\$ 104,241	\$ 104,470	\$ 106,105	\$ 105,783
All Other	\$ 31,792	\$ 33,747	\$ 35,551	\$ 34,212
Healthcare benefits per active employee	\$ 13,129	\$ 11,973	\$ 12,840	\$ 14,042
Healthcare benefits per retiree	\$ 2,786	\$ 2,837	\$ 3,247	\$ 3,229
Other Benefits per active employee	\$ 1,115	\$ 1,335	\$ 1,735	\$ 1,788
Pension Assessment Cost/School Participant (Middlesex Only)	\$ 6,216	\$ 6,160	\$ 6,413	\$ 6,582

Notes:

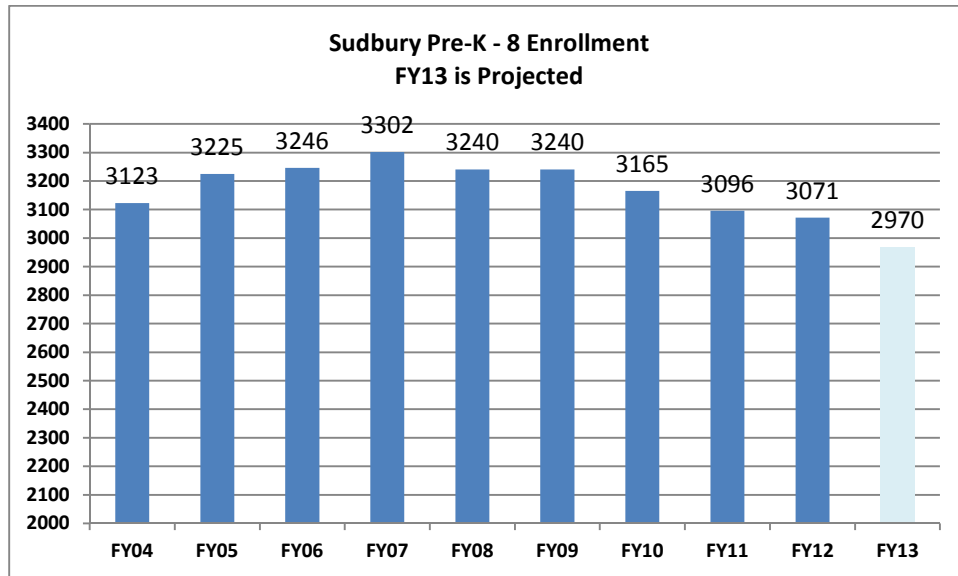
1) Payments for benefits are those made by SPS and do not include employee or retiree contributions.

2) In FY10, Sudbury Pubic 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 contibutions 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 includes other cash payments other than overtime



	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
SUDBURY PUBLIC SCHOOLS				
Sudbury Public Schools	27,815,697	30,763,680	31,576,569	31,971,896
Offsets (incl. METCO)		(2,480,863)	(2,841,775)	(2,775,371)
Sudbury Public Schools	27,815,697	28,282,817	28,734,794	29,196,525
Add: Benefits & Insurance	6,204,274	6,032,762	6,672,777	7,096,235
Total: Sudbury Public Schools	34,019,971	34,315,578	35,407,571	36,292,760

The FY13 No Override Budget will provide Sudbury Public Schools with an additional \$885,190 in operating revenue over FY12 amounts. This represents an increase of 2.5% over the SPS Fiscal Year 2012 budget, inclusive of pension and insurance costs. The allowed growth in the No Override budget funds the staffing levels assumed in the Level Service, or “roll up” budget, as a result of the significant savings in health insurance estimated by moving to the GIC. However, the FY13 Budget is based on the assumptions outlined by the Finance Committee as collective bargaining negotiations with the school district’s unions are ongoing. As a result, the net savings generated by the move to the GIC could be impacted by the outcome of these negotiations.

Excluding Special Education costs, all other non-personnel related operating expenses are projected to decrease by approximately 0.1% in FY13. By contrast, Special Education costs are projected to increase by 11.7%, or \$422,712, in FY13.

No Override Budget

The Finance Committee recommends approval of a FY13 No Override Budget for the Sudbury Public Schools in the amount of \$36,292,760.

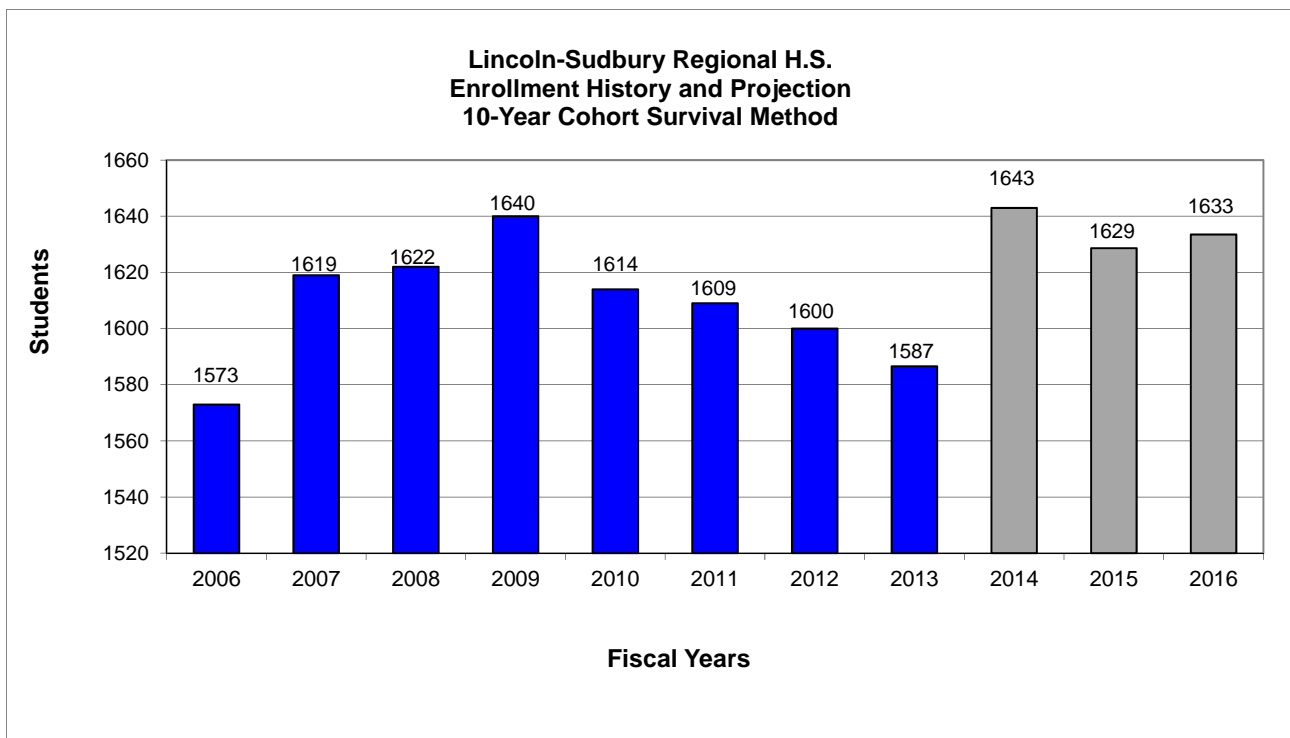
LINCOLN-SUDBURY REGIONAL HIGH SCHOOL BUDGET SUMMARY

	FY10 Actual	FY11 Actual	FY12 Non Override Updated	FY13 Non Override
Salaries & Other Cash Compensation				
Administration	\$ 1,022,073	\$ 1,017,148	\$ 1,045,246	\$ 1,054,613
Instruction (excl Spec Ed)	9,905,715	10,031,948	10,160,013	9,966,098
Special Ed Instruction	1,317,317	1,305,481	1,412,057	1,437,317
Educational Support	502,269	522,637	497,664	506,077
Educational Support - Special Education	370,707	365,166	393,983	404,984
Clerical/Admin Support	865,054	881,080	827,628	847,571
Grounds/Maintenance	598,373	623,160	575,354	575,354
Coaching	373,617	370,638	370,300	370,300
All Other (Substitutes, Extra Services, Curric Dev)	168,466	203,193	200,406	200,406
Total Salaries & Other Cash Compensation	\$ 15,123,589	\$ 15,320,449	\$ 15,482,651	\$ 15,362,720
Expenses				
Instruction (excl Spec Ed)	\$ 476,082	\$ 446,080	\$ 402,676	\$ 392,626
Special Education	3,145,307	3,251,024	4,559,169	5,304,508
Educational Support	966,864	1,024,545	940,099	955,571
Operations excl Utilities	505,363	434,227	432,170	442,835
Utilities	822,156	733,984	772,664	761,186
All Other Expenses & Contingency	186,673	252,758	139,081	183,045
Total Expenses	\$ 6,102,445	\$ 6,142,618	\$ 7,245,859	\$ 8,039,771
Subtotal before Benefits	\$ 21,226,035	\$ 21,463,067	\$ 22,728,510	\$ 23,402,491
Healthcare Benefits				
Active Employees	\$ 1,579,178	\$ 1,898,077	\$ 2,256,110	\$ 1,988,217
Retired Employees	777,804	795,696	889,890	818,708
Total Healthcare Benefits	\$ 2,356,982	\$ 2,693,773	\$ 3,146,000	\$ 2,806,925
Retirement & Other Benefits				
Active Employees	\$ 362,036	\$ 395,614	\$ 503,704	\$ 409,100
Retired Employees	379,075	396,133	427,252	447,663
Total Retirement & Other Benefits	\$ 741,111	\$ 791,747	\$ 930,956	\$ 856,763
Total Benefits	\$ 3,098,093	\$ 3,485,520	\$ 4,076,956	\$ 3,663,688
Total LSRHS Operating Expenses, including grant funding	\$ 24,324,128	\$ 24,948,587	\$ 26,805,466	\$ 27,066,179
LSRHS Grants, Fees & Other Offsets, incl circuit breaker	\$ 1,129,306	\$ 1,176,004	\$ 2,252,850	\$ 1,899,748
Net LSRHS Operating Expenses	\$ 23,194,822	\$ 23,772,583	\$ 24,552,616	\$ 25,166,431
Total Compensation (salaries, other cash compensation & benefits) as a percentage of Operating Expenses (<u>before</u> Offsets)	74.9%	75.4%	73.0%	70.3%
Students:				
Sudbury	1,304	1,292	1278	1268
Lincoln	242	212	216	214
Metco	91	91	92	92
Other Out of District Students at LS	14	14	14	13
Total	1,651	1,609	1,600	1587
Cost per Student (Operating Expenses <u>before</u> Offsets divided by number of Students)	14,733	15,506	16,753	17,055

	FY10 Actual	FY11 Actual	FY12 Non Override Updated	FY13 Non Override
Headcount (FTEs)				
Administrators	8.20	8.00	8.00	8.00
Administrative Support	16.43	15.94	15.67	15.67
Teachers (excl SPED)	123.90	122.28	119.36	111.46
Classroom & Teaching Support (excl SPED)	3.40	4.70	3.40	3.40
SPED Teachers	15.95	15.50	15.70	15.70
SPED Support	13.97	13.82	13.32	13.32
Custodial/Grounds/Maintenance (.20 is offset to Building Use)	11.00	11.00	10.00	10.00
All Other	8.46	8.46	8.43	8.43
Total FTEs, including non-operating grant funded positions	201.31	199.70	193.88	185.98
Part Time Employees receiving benefits	24	33	30	30
Retirees receiving Full Healthcare benefits	39	47	49	42
Retirees receiving Medicare Supplemental benefits	90	91	93	93
Average Class Size				
Academic (English, History, Math, Science, Languages)	25.0	23.58	23.77	
Electives are in every subject area and cannot be separated				
Students Participating in Athletics	1,146		1,229 <i>Estimated</i>	1,229 <i>Estimated</i>
Average Salaries				
Teachers	\$ 80,250	\$ 82,286	\$ 85,681	\$ 89,678
Administration	\$ 124,643	\$ 127,143	\$ 130,656	\$ 131,827
All Other	\$ 50,432	\$ 50,792	\$ 51,964	\$ 52,739
Healthcare benefits per active employee	\$ 7,845	\$ 9,505	\$ 12,261	\$ 11,559
Healthcare benefits per retiree	\$ 6,029	\$ 5,766	\$ 6,267	\$ 6,065
Retirement Assessment per L-S participant	\$ 2,462	\$ 2,572	\$ 2,670	\$ 2,798
Reconciliation to Page FC-14				
LS Gross Assessment (equals Subtotal before Benefits above)	\$21,226,035	\$21,463,067	\$22,728,510	\$ 23,402,491
LS Employee Benefits (from above)	3,098,093	3,485,520	4,076,956	3,663,688
Offsets & Reapportionment:				
Grants & Offsets (above, incl circuit breaker)	1,129,306	1,176,004	2,252,850	1,899,748
State Aid to LSRHS (does not incl circuit breaker; incl ARRA)	2,498,616	2,752,456	2,748,157	2,748,157
Lincoln Share of the LSRHS Budget	3,094,464	3,260,600	3,218,685	3,268,874
Estimated Receipts	61,000	50,000	50,000	50,000
Reapportionment	854,422	325,572	455,817	251,876
Total Offsets & Reapportionment	\$ 7,637,809	\$ 7,564,632	\$ 8,725,509	\$ 8,218,655
LSRHS Net Operating Assessment	\$16,686,319	\$17,383,955	\$18,079,957	\$ 18,847,524

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.
Teachers and administrators are in the Mass. Teachers Retirement System to which the District makes no contributions.
- 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) Effective for FY13, the Teachers' Association and the School Committee negotiated a change to GIC benchmark plans under Minuteman Nashoba Health Group, an increase in employee contribution to the most expensive plans offered, a one-time incentive to those already enrolled in health insurance to move to the least expensive plans, and establishment of a Health Reimbursement Account (HRA) in line with health insurance reform legislation.
- 4) The FY12 No Override Updated Budget reflects significant increases in Special Education out of district placement costs resulting in a budget deficit for FY12. The Updated Budget reflects anticipated receipt of Extraordinary Relief from the State and/or the use of Excess & Deficiency funds to address this deficit.
- 5) The FY13 No Override Budget includes significant increases over and above those in the FY12 No Override Updated Budget, causing a shortfall in funding needed to support level staffing. The FY13 No Override Budget as presented would require a reduction of at least 7.90 FTEs if the full amount of projected Extraordinary Relief is not received in FY12.
- 6) Average salaries as calculated include base salary plus longevity, stipends and other payments other than overtime.



	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
LINCOLN-SUDBURY REGIONAL HS				
Sudbury Apportionment	84.51%	84.36%	84.88%	85.04%
LSRHS Benefits Assessment	3,142,491	3,206,376	3,506,669	3,121,829
LSRHS Oper. Assessment	16,854,852	17,011,347	17,333,368	18,322,487
LSRHS Oper. Offsets	(3,192,298)	(2,640,344)	(2,760,082)	(2,596,792)
	16,805,045	17,577,379	18,079,955	18,847,524
LSRHS Debt Assessment	2,298,949	2,237,147	2,193,072	2,142,548
Total LSRHS (Sudbury Portion)	19,103,994	19,814,526	20,273,027	20,990,072

Lincoln-Sudbury Regional High School 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 FY13 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 3% 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 FY13 budget ratio for Sudbury is 85.04% (up from 84.88% in FY12) and for Lincoln is 14.96%.

The FY13 No Override Budget will provide the High School with an additional \$613,815 in operating revenue over FY12 amounts. This represents an increase of 2.5% over the LSRHS Fiscal Year 2012 budget, inclusive of pension and insurance costs. The FY13 Budget is based on the assumptions outlined by the Finance Committee as collective bargaining negotiations with the school district's unions are ongoing.

Enrollment at LSRHS has increased 78.8% from FY95 (887 students) to FY12 (1,586 students). Projections indicate a decline in enrollments in FY13 (1,574 students, or a total decrease of 12 students). From FY95 to FY09, enrollment increased by 86% from 887 students to 1,653 students, which on an annual basis represents a growth rate of 4.5% per year. More recent enrollment trends show a decline of 4.8% from FY09 to FY13 (forecast), which on an annual basis represents a decrease of 1.2% per year. However, it is expected that 2014 will again show an increase in enrollment as a larger number of middle school students enter the High School.

While the general student population will not be growing, the High School will experience another major increase in its out of district placements for special needs students in FY13. Excluding Special Education costs, all other non-personnel related operating expenses are projected to increase by approximately 1.6% in FY13. By contrast, Special Education costs (excluding instruction) are projected to increase by 33.1%, or \$1,320,142, in FY13. The biggest driver of this increase is the significant growth of the required costs for out-of-district placements, costs which include both tuitions as well as transportation. While the High School qualifies for Extraordinary Relief from the state, the funding decisions are not expected to be communicated by the state to school districts until sometime in April. In total, these cost increases exceed the total Non Override Budget increase for LSRHS by more than \$700,000.

No Override Budget

The Finance Committee recommends approval of a FY13 No Override net operating budget assessment of \$18,847,524 from Sudbury to LSRHS and a LSHRS debt assessment of \$2,142,548.

Knowing neither the amount of Extraordinary Relief that LSRHS will obtain from the state nor the outcome of labor contract negotiations, it is difficult for the Finance Committee to accurately assess the impact that the FY13 No Override budget will have on the High School. Nevertheless, members of the Finance Committee remain concerned that this funding level could force the High School to make staff reductions, including teaching staff.

MINUTEMAN VOCATIONAL TECHNICAL SCHOOL DISTRICT

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
MINUTEMAN VOCATIONAL				
Operating Assessment	298,098	195,498	321,590	274,416
Total: Minuteman Vocational	298,098	195,498	321,590	274,416

The proposed FY13 operating budget for Minuteman Regional Career and Technical High School shows a reduction in the assessment to Sudbury of \$47,174 or 14.7% from the FY12 assessment. The overall FY13 operating budget for Minuteman increased by \$816,240 or 4.97% above the FY12 budget. The decrease in the assessment to Sudbury was due to changes in the enrollment mix of Sudbury students at Minuteman, shrinking from 16 student to 11 students from FY12 to FY13, respectively.

The Finance Committee recommends approval of FY13 assessment to the District of \$274,416.

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
OTHER EDUCATIONAL ASSESSMENTS				
Operating Assessment	0	0	0	0
Total: Other Regional	0	0	0	0

The proposed FY13 operating budget for other educational assessments is zero. The Town does not anticipate having students attend any other high school districts in FY13.

TOWN SERVICES BUDGET SUMMARY

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
General Government	2,207,011	2,244,846	2,325,635	2,383,917
Public Safety	6,297,069	6,554,642	7,016,935	7,244,389
Public Works	3,364,252	3,446,462	3,304,146	3,390,044
Human Services	520,208	507,899	534,239	543,789
Culture & Recreation	1,112,286	1,148,014	1,166,009	1,125,243
Town-Wide Operations & Transfers	106,619	118,700	401,148	392,925
Subtotal before Benefits	13,607,446	14,020,563	14,748,111	15,080,307
Town Employee Benefits	3,964,802	4,231,089	4,490,702	4,826,539
Total Town Operating Expenses	17,572,248	18,251,652	19,238,813	19,906,847
Town Offsets	(412,553)	(458,684)	(645,738)	(848,944)
Net Town Operating Expenses	17,159,695	17,792,968	18,593,075	19,057,903
Town Salaries & Other Cash Compensation	9,846,422	9,948,387	10,597,421	10,857,791
Healthcare Benefits				
Active Employees	1,868,155	1,945,343	2,080,799	2,249,471
Retired Employees	295,076	333,075	385,081	408,869
Total Healthcare Benefits	2,163,231	2,278,418	2,465,880	2,658,340
Retirement Assessment Costs	1,549,191	1,677,363	1,704,598	1,831,526
Other Benefits & Insurances	252,380	275,308	320,224	336,673
Total Employee Benefits & Insurances	3,964,802	4,231,089	4,490,702	4,826,539
	0.00	0.00	0.00	
Town Expenses	3,089,075	3,271,207	3,631,640	3,696,966
Town Capital	94,300	87,936	94,300	100,800
Town Snow & Ice	577,649	713,033	424,750	424,750
Town Offsets	(412,553)	(458,684)	(645,738)	(848,944)
Net Town Operating Expenses	17,159,695	17,792,968	18,593,075	19,057,903
Town Only Employee Headcount (FTE)	162.16	161.07	161.07	161.44

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
Total Compensation (salaries, other cash payments & benefits) as a percentage of Operating Expenses (before Offsets)	78.6%	77.7%	78.4%	78.8%
Average Salaries:				
Senior Managers	112,718	110,067	117,027	121,383
Department Heads	77,500	83,012	85,873	86,311
All Other Employees	49,011	49,210	53,295	53,817
Part time employees w/ health benefits	14	15	16	16
Active F/T employees w/ health benefits	142	140	134	134
Retirees w/ health benefits	89	92	104	104
Healthcare benefits cost per active employee*	11,777	12,360	13,651	14,655
Healthcare benefits cost per retiree *	3,315	3,620	3,703	3,931
Pension Assessment cost per Town Participants*	5,553	6,012	6,110	6,684
* Benefits breakdown active vs. retired is estimate only. Retiree per average cost based on recent average. Counts as of 10/1 each year for healthcare and 12/1 for pension. Cost per employee represents Town's estimated annual contribution.				
<u>Additional Notes:</u>				
1) Payments for benefits are those made by the Town and do not include employee or retiree contributions.				
2) 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.				

GENERAL GOVERNMENT

	FY10	FY11	FY12	FY13
	Budget	Budget	Appropriated	No Override
GENERAL GOVERNMENT				
Selectmen/Town Manager	302,816	302,092	313,805	332,892
ATM/Personnel	111,463	109,077	120,157	123,620
Law	189,712	181,079	160,666	160,666
Finance Committee	1,456	1,485	2,055	2,054
Accounting	245,834	258,389	273,557	282,875
Assessors	261,078	278,444	284,447	314,246
Treasurer/Collector	285,780	285,717	301,405	305,298
Information Systems	312,367	322,331	330,171	330,171
Town Clerk & Registrars	231,684	238,210	241,763	241,762
Conservation	107,266	110,440	114,668	112,883
Planning & Board of Appeals	157,555	157,581	182,940	177,450
Total General Government	2,207,011	2,244,846	2,325,635	2,383,917
Employee Compensation	1,811,486	1,848,005	1,966,171	1,997,586
All Other Expenses	395,525	396,841	359,464	386,331
Total General Government	2,207,011	2,244,846	2,325,635	2,383,917

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

No Override Budget

The FY13 No Override Budget is increasing by \$58,282, or 2.5% compared to the FY12 budget. The General Government departments have small staffs yet are responsible for essential and mandated functions; any budget reductions are felt deeply throughout.

The Finance Committee recommends approval of a FY13 No Override Budget for General Government of \$2,383,917

PUBLIC SAFETY

	FY10	FY11	FY12	FY13
	Budget	Budget	Appropriated	No Override
PUBLIC SAFETY				
Police	2,505,324	2,630,878	2,784,137	2,578,774
Fire	2,945,144	3,003,025	3,224,037	3,244,091
Combined Dispatch	0	0	0	412,764
Building Department	846,601	920,738	1,008,760	1,008,760
Total Public Safety	6,297,069	6,554,642	7,016,935	7,244,389
Employee Compensation	5,241,809	5,359,454	5,717,784	5,944,422
All Other Expenses	960,960	1,107,252	1,204,851	1,199,167
Capital	94,300	87,936	94,300	100,800
Total Public Safety	6,297,069	6,554,642	7,016,935	7,244,389

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 38% of the overall Town operating budget and where 49% of the Town's full-time equivalent ("FTE") employees work (exclusive of schools).

No Override Budget

The FY13 No Override Budget for this cluster is increasing by \$227,455 or 3.2% over the FY12 budgets.

The Finance Committee recommends approval of a FY13 No Override Budget for Public Safety of \$7,244,389.

PUBLIC WORKS

	FY10	FY11	FY12	FY13
	Budget	Budget	Appropriated	No Override
PUBLIC WORKS				
Engineering	316,116	310,106	410,986	428,312
Streets & Roads	2,434,193	2,567,748	2,382,393	2,436,976
Trees and Cemetery	335,913	343,368	337,985	347,716
Parks and Grounds	278,030	225,239	172,782	177,040
Total Public Works	3,364,252	3,446,462	3,304,146	3,390,044
Employee Compensation	1,677,233	1,624,142	1,750,564	1,787,771
All Other Expenses	1,109,370	1,109,286	1,128,832	1,177,523
Snow & Ice	577,649	713,033	424,750	424,750
Total Public Works	3,364,252	3,446,462	3,304,146	3,390,044

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.

No Override Budget

The FY13 No Override Budget for this cluster is increasing by \$85,898 or 2.6% over the FY12 budget. 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 FY13 budget

The Finance Committee recommends approval of a FY13 No Override Budget for Public Works of \$3,390,044.

HUMAN SERVICES

	FY10	FY11	FY12	FY13
	Budget	Budget	Appropriated	No Override
HUMAN SERVICES				
Board of Health	370,083	369,430	377,636	377,633
Council on Aging	134,301	119,611	139,187	136,741
Veterans Affairs	15,825	18,858	17,415	29,415
Total Human Services	520,208	507,899	534,239	543,789
Employee Compensation	361,213	340,448	363,947	359,399
All Other Expenses	158,995	167,451	170,292	184,390
Total Human Services	520,208	507,899	534,239	543,789

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 1/2 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.

No Override Budget

The FY13 No Override Budget for this cluster is increasing by \$9,550 or 1.8% over the FY12 budget.

The Finance Committee recommends approval of a FY13 No Override Budget for Human Services of \$543,789.

CULTURE & RECREATION

	FY10	FY11	FY12	FY13
	Budget	Budget	Appropriated	No Override
CULTURE & RECREATION				
Goodnow Library	971,918	1,010,602	1,015,308	1,015,308
Recreation	132,729	129,956	142,641	101,875
Historical Commission	5,386	5,308	5,309	5,309
Historic Districts Commission	2,253	2,148	2,751	2,751
Total Culture & Recreation	1,112,286	1,148,014	1,166,009	1,125,243
Employee Compensation	754,680	776,337	788,891	758,613
All Other Expenses	357,606	371,677	377,118	366,630
Total Culture & Recreation	1,112,286	1,148,014	1,166,009	1,125,243

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 ½ 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.

No Override Budget

The FY13 No Override Budget for this cluster is decreasing by \$40,766 or -3.5% over the FY12 budget. The decrease in funding is due to the newly expanded agreement with the Town of Wayland to share not only the Recreation Director but also the Program Coordinator (a Sudbury employee) and an Assistant Program Coordinator (a Wayland employee).

The Finance Committee recommends approval of a FY13 No Override Budget for Culture & Recreation of \$1,125,243.

TOWN-WIDE OPERATING AND TRANSFER ACCOUNTS

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
UNCLASSIFIED & RESERVES				
Town-Wide Operating Expenses	106,619	118,700	142,100	132,925
Town Reserve Account	0	0	248,983	250,000
Salary Contingency Account	0	0	10,065	10,000
Total Unclassified & Transfers	106,619	118,700	401,148	392,925

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 FY13 budget for this area represents is decreasing by \$9,175 or 6.5% over the FY12 budget.

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 \$1,017 or 0.4% compared to FY12. 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 \$10,000 to accommodate for 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 a FY13 No Override Budget for Unclassified and Transfer Accounts of \$392,925.

BENEFITS AND INSURANCE

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
BENEFITS & INSURANCE				
Workers' Compensation	25,090	30,123	41,055	49,642
Unemployment Compensation	41,730	106,599	121,905	140,000
Medicare Tax	421,241	442,938	483,624	498,133
Life Insurance	3,620	3,531	4,343	4,430
Employee Medical Premiums	5,946,450	5,706,281	6,144,460	5,635,051
Retiree Medical Premiums/ OPEB	782,694	883,488	1,021,396	1,041,800
Health Insurance Reserve	-	-	67,812	1,070,758
Retirement Assessment	2,717,879	2,847,815	2,961,642	3,121,597
Property/Liab. Insurance	199,420	213,481	284,096	310,092
New Hires Estimate	-	-	-	-
Total: Employee Benefits	10,138,123	10,234,255	11,130,333	11,871,503
	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
BENEFITS & INSURANCE				
Town	3,933,849	4,201,494	4,457,556	4,775,268
Schools	6,204,274	6,032,762	6,672,777	7,096,235
	10,138,123	10,234,256	11,130,333	11,871,503

No Override Budget

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

Similar to last year, 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.

As discussed previously and in more detail on page FC-6, the Board of Selectmen voted to accept the provisions of sections 21-23 of Chapter 32B of the General Laws in November 2011. After following the prescribed process, the outcome for the Town and SPS was a decision to join the GIC beginning in FY13. By joining the GIC, year-over-year savings are estimated at approximately \$1.1 million as compared to FY12 budget levels with approximately \$0.7 million and \$0.4 million attributed to SPS and the Town, respectively, at the time this warrant was prepared. These GIC related savings are presented in the table on page FC-18 in the categories labeled "SPS Employee Benefits Reserve" and "Town Employee Benefits Reserve". We anticipate that this projection will continue to be refined as new information and estimates regarding GIC rates and employee enrollment are acquired. A new savings estimate for the Town and SPS may be provided heading into Town Meeting.

In prior years, 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 FY13, 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.

The Finance Committee recommends approval of a FY13 No Override Budget for Benefits and Insurance of \$11,871,503.

DEBT SERVICE

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
DEBT SERVICE				
Short-term Loan Interest	7,620	-	-	-
Long Term Bond Int.	1,151,604	1,025,354	893,860	768,521
Long Term Bond Principal	3,110,000	3,155,000	2,990,000	3,030,000
Town Debt Service Subtotal	4,269,224	4,180,354	3,883,860	3,798,521
LSRHS Debt Service, Sudbury Portion	2,298,949	2,237,147	2,193,072	2,142,548
Total: Debt Service	6,568,173	6,417,501	6,076,932	5,941,069
NON-EXEMPT DEBT/ADJUSTMENTS				
Non-Exempt Debt Service	(7,620)	-	-	-
Premium on Bonds	(7,007)	(5,605)	(3,737)	(7,474)
SBAB Debt Reimbursement	(1,702,596)	(1,702,596)	(1,681,224)	(1,681,224)
Sub-Total: Non-exempt debt adjustments	(1,717,223)	(1,708,201)	(1,684,961)	(1,688,698)
Total Exempt Debt to be raised	4,850,950	4,709,300	4,391,971	4,252,371

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 High School. 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 LSRHS issues its debt after working with the LSRHS School Committee, the School District's Financial Advisor and pursuant to votes of Town Meetings of both Lincoln and Sudbury.

The budget request for FY13 is for an appropriation of \$3,798,521 which is the total amount of gross debt service payments required for all Town of Sudbury debt. A state grant, estimated at \$1,681,224, 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 the LSRHS debt service payment for FY13 of

\$2,142,548 is not requested in this budget as such but rather is requested within the High School assessment to Sudbury.

The Finance Committee recommends approval of a FY13 No Override Budget for Town Debt Service for the Town of Sudbury of \$3,798,521.

CAPITAL SPENDING

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
Capital & Capital Articles				
CIPC Items	523,383	529,054	538,947	552,421
Total Capital & Articles	523,383	529,054	538,947	552,421
	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
Capital				
Town Buildings	70,000	116,771	59,607	51,925
General Government	22,622	11,955	0	37,000
Public Safety	25,000	10,000	72,396	61,659
Public Works	325,761	298,328	316,944	346,837
Culture & Recreation	80,000	42,000	0	0
Sudbury Public Schools	0	50,000	90,000	55,000
Total: Operating Expenses	523,383	529,054	538,947	552,421

No Override Budget

The Finance Committee recommends approval of a FY13 No Override Capital Budget of \$552,421.

CAPITAL IMPROVEMENT PLANNING COMMITTEE REPORT

A capital expenditure is defined as major, non-recurring cost 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 FY13.

The Committee held 2 hearings on December 14 and 15, 2012. Following its review, the Committee voted to recommend that the following capital items be funded through FY13 Operating Budgets subject to available funding:

FY13
No Override Notes

Ongoing Leases:

Unit # PR-6: Landscape Tractor w/ Bucket (Town share)	4,560	Started FY12
Unit #10: 2011 Freightliner 10 Wheel Dump	28,187	Started FY12
Unit #37: 2011 Chevy One Ton Rack Body	10,015	Started FY12
Unit #35: Kobuta Tractor	15,664	Started FY11
Unit #54: Elgin Pelican Sweeper	33,235	Started FY11
Unit #14: 2009 Chevy pick-up	6,715	Started FY10
Unit #20: 2009 6-Wheel Dump Truck	25,595	Started FY10
Unit #8: 2009 John Deere loader	27,315	Started FY10
Unit #PR-2: 2011 Chevy Pickup	8,347	Started FY10
Unit #22: 2009 John Deere Backhoe	25,183	Started FY09
Unit #27: 2007 Mack 10-Wheel	27,390	Started FY09
Unit #33: 2009 Multipurpose Tractor	25,231	Started FY09
Total for On-Going Leases	<u>237,437</u>	

DPW:

Bombardier Tractor (#21)	30,400	New Lease
6 Wheel Dump Truck (#4)	29,000	New Lease
Conversion on GMC G-Quip	<u>50,000</u>	Purchase
	<u>109,400</u>	

Fire:

Vehicle Replacement (Car#2) *	<u>30,909</u>	Net Purchase
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Police:

IP Phones and Fire Alarm Monitor Receiver ¹	<u>30,750</u>	Net Purchase
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Building:

Various Building Improvements	<u>51,925</u>	Purchase
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Information Technology:

Telephone System Upgrade for DPW	<u>37,000</u>	Purchase
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SPS:

Noyes Switch Gear Replacement	<u>55,000</u>	Purchase
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Total FY13 Operating Capital Requests 552,421

From Prior Year Capital Articles

Vehicle Replacement (Car#2) *	7,091	From ATM 2011 Article #5
Library Telephone System Upgrade	<u>9,800</u>	From ATM 2009 Article #5
	<u>16,891</u>	

¹ IP Phones and Fire Alarm Monitor Receiver project includes other costs to be funded by sources such as 911 grant monies and various operating budgets in FY12.

The Capital Improvement Planning Committee recommends approval of a FY13 Capital Budget of \$552,421.

Status of the Capital Projects Funded for FY11

Starting in 2010, the Committee also reports on the status of the projects approved in the previous fiscal year (concluded as of this budget cycle). Status of the projects funded for FY11 (July 1, 2010 through June 30, 2011):

Following is the status of projects funded for FY11.

DPW:

Ongoing leases

- 2009 John Deere Loader (# 8) Lease Start FY10
Approved: \$27,315; Spent \$27,315
- 2009 Chevy Pick Up (# 14) Lease Start FY10
Approved: \$6,715; Spent \$6,715
- 2009 Volvo 6-Wheel Dump Truck (# 20) Lease Start FY10
Approved: \$25,595; Spent \$25,595
- John Deere Tractor (# PR-6) Lease Start FY10
Approved: \$9,120; Spent \$9,120
- 2009 John Deere Backhoe (# 22) Lease Start FY09
Approved: \$25,183; Spent \$25,183
- 2007 Dump Truck 10-Wheel (# 27) Start FY09
Approved \$27,390; Spent \$27,390
- 2009 Multi-purpose Tractor (# 33) Lease Start FY09
Approved \$25,320; Spent \$25,320
- 2008 Volvo 10-Wheel Dump Truck (# 5) Lease Start FY08
Approved \$23,977; Spent \$23,977
- 2008 International 6-Wheel Dump Truck (# 24) Lease Start FY08
Approved \$28,054; Spent \$25,054
- 2008 International 6-Wheel Chip/Dump (# 23) Lease Start FY08
Approved \$18,535; Spent \$18,535
- 2007 Mack 6-Wheel Dump (# 3) Lease Start FY07
Approved \$25,410; Spent \$25,410

New leases

- 2010 Boom Flail Tractor Mower (# 35) Lease Start FY11
Approved: \$23,500; Spent \$18,116
Lower bid allowed cost savings
- 2010 Elgin Pelican Sweeper (# 36) Lease Start FY11
Approved: \$31,000; Spent \$35,235
Higher bid caused cost overrun

Park & Recreation:

- Building Renovation at Fairbank
Approved \$42,000; Spent \$?
Project delayed with completion expected September 2012

Town:

- MUNIS Tax Software
Approved \$11,955; Spent \$11,955
Last year of 5-year lease; project completed

Sudbury School:

- Nixon rooftop HVAC and renovation
Approved \$50,000; Spent \$50,135

Building:

- Various building improvements
Approved \$58,771; Spent \$29,125
- Senior Center Roof and Skylight
Approved \$58,000; Spent \$100,500
Project scope increased to include gym area.
Additional funding was from previous year's unspent building improvement funds.

Police:

- Live fingerprint System
Approved \$10,000; Spent \$10,008

ENTERPRISE FUNDS

	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
ENTERPRISE FUND EXPENDITURES				
Transfer Station	256,534	260,805	290,389	297,461
Pool	455,118	485,381	517,230	516,197
Recreation Field Maintenance	113,606	150,908	309,614	276,943
Total Enterprises (Direct)	825,257	897,094	1,117,234	1,090,601
	FY10	FY11	FY12	FY13
	Actual	Actual	Appropriated	No Override
ENTERPRISE FUND REVENUES				
Transfer Station	297,529	330,644	290,389	297,461
Pool	474,265	487,506	517,230	516,197
Recreation Field Maintenance	170,493	183,976	309,614	276,943
Total Enterprises (Direct)	942,286	1,002,125	1,117,233	1,090,601

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 FY13 No Override Budget of \$297,461 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 FY13 No Override Budget of \$516,197 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 FY13 No Override Budget of \$276,943 for the Recreational Field Maintenance Enterprise Fund.

COMMUNITY PRESERVATION FUND

<u>Sudbury Community Preservation Fund Balance Statement</u>			
	FY11 ⁶	FY12	FY13
CPA Funds - 2044 & 3400	Actual	Appropriated	Budget
Beginning Fund Balances	\$ 8,922,552	\$ 8,620,708	\$ 8,918,100
Revenues:			
CPA Surcharge & Fees	1,494,706	1,575,000	1,600,000
Intergovernmental	431,234	431,743	440,000
Investment Income	160,489	150,000	100,000
Total Revenues	2,086,429	2,156,743	2,140,000
Expenditures ⁷			
Debt Service ¹	1,052,035	1,226,556	1,171,498
Admin	71,077	85,000	82,750
Open Space	2,778,330	-	250,000
Community Housing ²	-	-	-
Historic Preservation	183,893	167,795	473,000
Recreation	154,492	200,000	100,000
Total Expenditures	4,239,828	1,679,351	2,077,248
Excess/(Deficiency)	(2,153,399)	477,392	62,752
Transfers In/(Out) ³	1,851,555	(180,000)	(200,000)
Ending CPA Operating Fund Balance	\$ 8,620,708	\$ 8,918,100	\$ 8,780,852
	0		
	FY11 ⁶	FY12	FY13
	Actual	Appropriated	Budget
Fund Balance Breakdown			
Reserved ^{5, 6}	\$ 2,198,248	\$ 2,198,248	\$ 2,198,248
Unreserved	\$ 6,422,461	\$ 6,719,853	\$ 6,582,605
	\$ 8,620,708	\$ 8,918,100	\$ 8,780,852
Year-end Cash & Investments ^{4,6}	\$8,623,772		
Exhibit Notes			
1 Debt Service allocation:	FY11	FY12	FY13
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 FY11 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
	FY03	FY05	FY11	FY12			
FY12 Principal	525,000	1,880,000	575,000		2,980,000		
FY12 Interest	42,000	619,500	185,449		846,949	3,826,949	21,130,000
FY13 Principal	525,000	1,850,000	495,000	160,000	3,030,000		
FY13 Interest	21,000	555,131	152,938	39,452	768,521	3,798,521	18,100,000
FY14 Principal		1,830,000	490,000	160,000	2,480,000		
FY14 Interest		491,044	138,088	30,388	659,519	3,139,519	15,620,000
FY15 Principal		1,810,000	490,000	160,000	2,460,000		
FY15 Interest		424,800	118,488	27,188	570,475	3,030,475	13,160,000
FY16 Principal		1,695,000	485,000	160,000	2,340,000		
FY16 Interest		356,925	98,888	23,988	479,800	2,819,800	10,820,000
FY17 Principal		1,615,000	480,000	160,000	2,255,000		
FY17 Interest		292,900	79,488	19,988	392,375	2,647,375	8,565,000
FY18 Principal		1,605,000	480,000	160,000	2,245,000		
FY18 Interest		228,400	60,288	15,188	303,875	2,548,875	6,320,000
FY19 Principal		1,365,000	470,000	155,000	1,990,000		
FY19 Interest		168,800	44,688	11,238	224,725	2,214,725	4,330,000
FY20 Principal		1,445,000	455,000	155,000	2,055,000		
FY20 Interest		118,400	29,413	8,138	155,950	2,210,950	2,275,000
FY21 Principal		1,515,000	450,000	155,000	2,120,000		
FY21 Interest		30,300	14,625	5,038	49,963	2,169,963	155,000
FY22 Principal				155,000	155,000		
FY22 Interest				1,744	1,744	156,744	-
Remain Principal	1,050,000	16,610,000	4,870,000	1,425,000	23,955,000		
Remain Interest	63,000	3,286,200	922,349	180,602	4,452,151		
TOTAL	1,113,000	19,896,200	5,792,349	1,605,602	28,407,151		

THIS SCHEDULE EXCLUDES CPA

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	1,580,000	1,060,000	12/15/2011	8/15/2021	STM11-01
Totals		8,185,000	6,625,000	1,560,000			

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.

FY13 LONG-TERM DEBT SERVICE DETAIL

DEBT SERVICE DETAIL		Budget
	Date	FY13
DPW	4/1/2003	442,430
K-8 Schools Remainder	4/1/2003	103,570
Curtis Refunding 2000 Issue	2/15/2005	1,364,694
Haynes Refunding 2000 Issue	2/15/2005	479,487
Weisblatt Land Refunding 1999 Issue	6/15/2005	325,351
Meachen Land Refunding 1999 Issue	6/15/2005	235,599
Loring Elementary Refunding 2011 Issue	10/1/2001	647,938
Noyes Elementary Repairs 2012 Issue	12/15/2011	199,452
Town Debt Service Subtotal		3,798,521
L-S assessment, Sudbury share		2,142,548
Total Debt Service (gross)		5,941,069
Debt Service by Category		
Schools K-8		2,811,414
Town		103,570
Land Acquisition		883,537
Town Subtotal		3,798,521
L-S assessment, Sudbury share		2,142,548
Total		5,941,069
Adjustments to debt		
Premium on Bonds		(7,474)
SBAB Debt Reimbursement		(1,681,224)
Total Adjustments		(1,688,698)
Total exempt debt to be raised by taxation		4,252,371

L-S DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date			Total	Annual	Remaining
	FY05	FY07	FY09		Debt Service	Principal
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
Remain Principal	4,200,000	8,250,000	400,000	12,850,000		
Remain Interest	260,193	2,494,250	19,000	2,773,443		
TOTAL	4,460,193	10,744,250	419,000	15,623,443		

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			
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
Remain Principal	3,039,982	195,018	1,850,000	4,535,000	2,030,000	11,650,000		
Remain Interest	916,023	58,764	555,100	1,356,084	698,583	3,584,554		
TOTAL	3,956,005	253,781	2,405,100	5,891,084	2,728,583	15,234,554		

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)

Cost Center	FY10 Actual	FY11 Actual	FY12 Current	FY13 Budget
LSRHS*	211.54	213.18	205.28	200.74
Sudbury K-8 Schools *	393.31	390.57	380.07	372.21
Public Safety	77.93	77.93	77.93	78.94
Public Works	32.03	30.03	30.03	30.03
General Government	30.29	30.29	30.29	30.12
Human Services	6.08	6.08	6.08	6.08
Culture & Recreation	16.80	16.29	16.29	16.27
Town Operating Sub-total	163.13	160.62	160.62	161.44
Town Enterprises	12.61	15.12	15.12	15.26
TOTAL	780.59	779.49	761.09	749.65

*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. EMPLOYEE COMPENSATION OVER \$100K^{1,2}

<u>Lincoln-Sudbury Regional High School</u>				
Position	FY11 Salary	Other Cash Comp	Other Non-Cash	Total
Superintendent/Principal	146,250			146,250
Director of Students Services	122,792			122,792
Coord. of Curric & Instr	122,792			122,792
Housemaster	108,904			108,904
Housemaster	122,792			122,792
Housemaster	122,792			122,792
Athletics/Activities Director	122,792			122,792
Director of Finance & Operations	134,804			134,804
Counselor	98,557	6,000		104,557
Department Coordinator	92,900	8,600		101,500
Department Coordinator	98,557	10,100		108,657
Department Coordinator	95,687	5,600		101,287
Department Coordinator	98,557	9,600		108,157
Department Coordinator	95,687	9,100		104,787
Department Coordinator	95,687	9,100		104,787
Department Coordinator	95,687	10,600		106,287
Department Coordinator	95,687	5,600		101,287
Department Coordinator	98,557	8,600		107,157
Teacher	98,557	3,500		102,057
Teacher	98,557	4,000		102,557
Teacher	98,557	5,000		103,557
Teacher	98,557	3,500		102,057
Teacher	98,557	1,500		100,057
Teacher	98,557	4,000		102,557
Teacher	98,557	4,334		102,891
Teacher	98,557	4,000		102,557
Teacher	98,557	4,000		102,557
Teacher	98,557	16,248		114,805
Teacher	98,558	5,000		103,558
Teacher	95,687	5,000		100,687
Teacher	95,687	5,000		100,687
* Includes contractual days required in the summer				
There are no "Non-Cash" benefits that employees receive.				

Sudbury Public Schools				
Position	FY11 Salary	Other Cash Comp	Other Non-Cash	Total
Superintendent (Retired 6/30/11)*	161,277	42,650		203,927
Assist. Supt. (Retired 6/30/11)*	121,459	9,376		130,835
Director of Business & Finance	111,725	1,000		112,725
Principal, Noyes	109,860	750		110,610
Special Education Administrator	108,826	1,743		110,569
Principal, Curtis	103,525	5,600		109,125
Principal, Nixon	107,437	-		107,437
Principal, Loring	102,664	125		102,789
*Other comp includes vacation days at time of retirement.				

Town				
Position	FY11 Salary	Other Cash Comp	Other Non-Cash	Total
Town Manager	147,077	16,382	-	163,459
DPW Director/Town Engineer	109,217	10,180		119,397
Finance Director/Treasurer/Collector	103,042	200	-	103,242
Police Chief	101,079	25,762	-	126,840
Director of Planning & Community Dev	100,209	4,004	-	104,213
Police Lieutenant	91,304	31,310	3,476	126,090
Fire Chief (<i>newly appointed 1/2011. Overtime earned in previous position</i>)	79,016	15,369	18,613	112,997
Police Sergeant	72,939	24,897	6,143	103,979
Fire Captain/Emt	68,508	18,391	30,510	117,409
Fire Captain/Emt	68,508	15,122	16,903	100,533
Fire Captain/Emt	68,508	14,761	37,741	121,010
Police Sergeant	62,660	22,183	22,120	106,963
Police Sergeant	62,660	19,351	12,211	94,222
Police Sergeant	57,038	21,980	19,546	98,564
Police Sergeant	56,957	21,248	13,572	91,778
Firefighter/Emt	52,485	5,328	43,461	101,274
*excludes non-town paid details which are reimbursed by outside sources.				

¹ Salaries are base pay.

² Other compensation paid to employees may include annuities, deferred compensation match, career incentive, merit pay, stipends, longevity, regular or retirement sick buy-back, 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*

TOWN CLASSIFICATION PLAN FY12*									
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								
Combined Facilities Director	16	85,887	89,251	92,746	96,376	100,151	104,072	108,147	112,427
Director of Public Works		47.01	48.85	50.76	52.75	54.82	56.96	59.19	61.54
Finance Director									
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
Community Housing Coordinator	12	60,876	63,258	65,734	68,306	70,980	73,758	76,646	79,680
Mgmt. Analyst, D.P.W.		33.32	34.62	35.98	37.39	38.85	40.37	41.95	43.61
Community Social Worker	11	55,858	58,043	60,315	62,674	65,129	67,677	70,324	73,108
		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
Community Housing Specialist									
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									
Adaptive Sports & Rec. Specialist	8	43,154	44,844	46,597	48,420	50,312	52,282	54,328	56,478
Assistant Assessor		23.62	24.55	25.50	26.50	27.54	28.62	29.74	30.91
Assistant Planner									
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									
Planning & Zoning Coordinator									
Program Coordinator, Park & Recr.									
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									
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

LIBRARY				<u>Minimum</u>	<u>Step 1</u>	<u>Step 2</u>	
Library Page				8.63	9.00	9.32	
HIGHWAY/PARK AND RECREATION							
Temporary Laborer					9.50 - 11.50		
Temporary Snow Removal Equipment Operator					16.05-17.28		
DEPARTMENTAL TEMPORARY OR SEASONAL HELP							
Temporary or Seasonal Help					9.50 - 11.50		
Temporary Special Project Help					13.66 - 17.21		
TECHNOLOGY DEPT. TEMPORARY OR SEASONAL HELP				<u>Level I</u>	<u>Level II</u>	<u>Level III</u>	
				9.50 - 11.50	14.61-18.25	18.40-22.99	
PARK AND RECREATION							
Part-time or seasonal hourly rated salary range (Salary paid from program fees)							
Position	<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						
Seasonal Camp Staff							
Position	<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			
ATKINSON POOL							
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						
ATKINSON POOL (Specialty Instruction)							
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.							
MISCELLANEOUS SINGLE RATED							
Election Warden and Election Clerk	8.40						
Deputy Election Warden/Clerk	8.40						
Election Officer & Teller	8.00						
Plumbing Inspector	39.83						
Veterans Agent	\$11,965 annual						
Call Firefighter	\$250 annual stipend and Step 1 Firefighter hourly rate						

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
Sergeant						
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					
	<u>MIN</u>	<u>Step 1</u>	<u>Step 2</u>	<u>Step 3</u>	<u>MAX</u>
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
<u>Single Rated:</u>					
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								
	<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	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.								

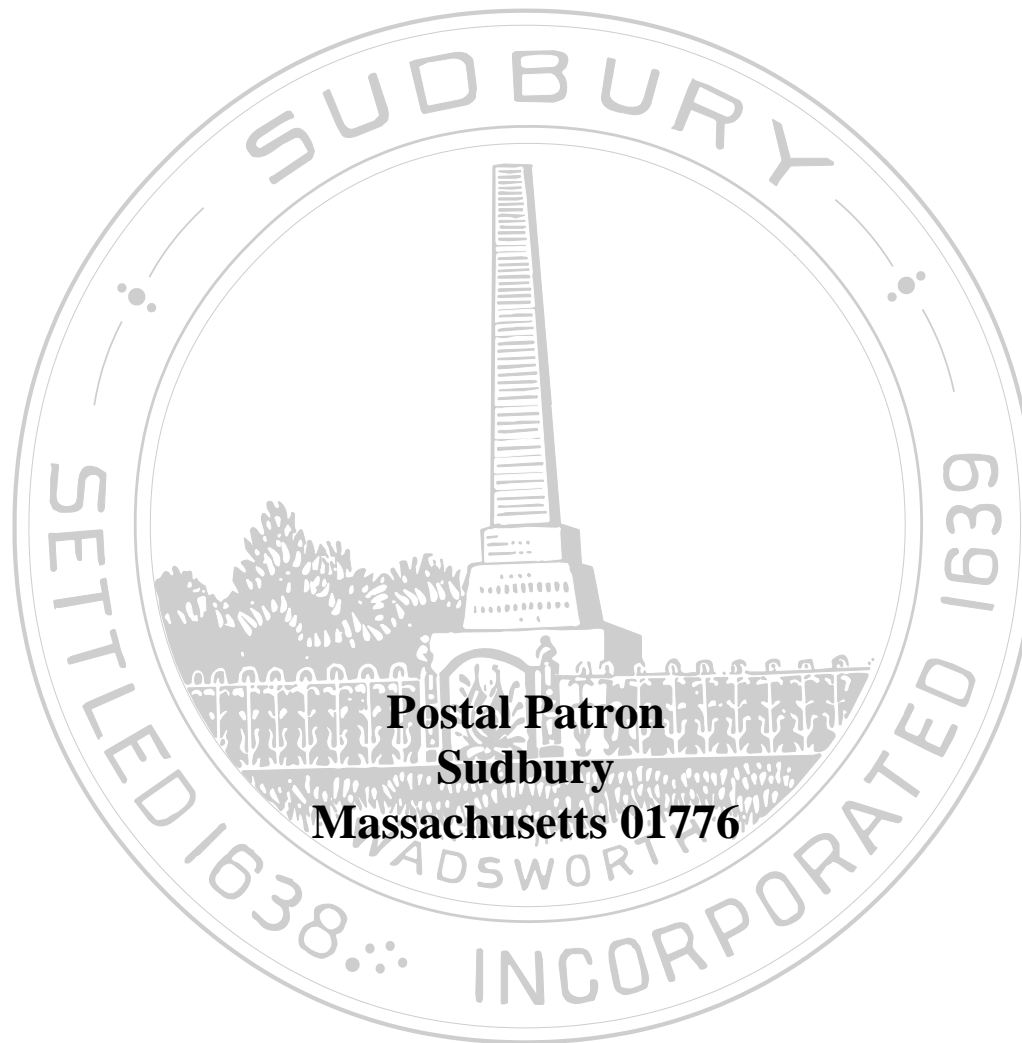
APPENDIX V.

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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