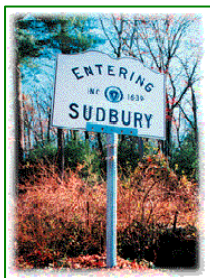


# TOWN OF SUDBURY

## FY08 PRELIMINARY BUDGET AND FINANCING PLAN

July 1, 2007 – June 30, 2008



### Board of Selectmen

**William Keller, Jr., Chairman**

**John Drobinski**

**Lawrence O'Brien**

Prepared by

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

December 29, 2006





GOVERNMENT FINANCE OFFICERS ASSOCIATION

*Distinguished  
Budget Presentation  
Award*

PRESENTED TO

**Town of Sudbury**

**Massachusetts**

For the Fiscal Year Beginning

**July 1, 2006**

President

Executive Director

The Government Finance Officers Association of the United States and Canada (GFOA) presented a Distinguished Budget Presentation Award to Town of Sudbury, Massachusetts for its annual budget for the fiscal year beginning July 1, 2006. In order to receive this award, a governmental unit must publish a budget document that meets program criteria as a policy document, as an operating guide, as a financial plan, and as a communications device.

This award is valid for a period of one year only. We believe our current budget continues to conform to program requirements, and we are submitting to GFOA to determine its eligibility for another award.



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# Town of Sudbury

## Town Manager's Office

Townmanager@town.sudbury.ma.us

278 Old Sudbury Road  
Sudbury MA 01776  
978-443-8891 x 381  
Maureen G. Valente, Town Manager  
<http://www.town.sudbury.ma.us>

December 29, 2006

The Honorable Board of Selectmen, Finance Committee, Capital Improvement Planning Committee, Sudbury Public School Committee and Lincoln-Sudbury Regional School Committee:

I am hereby submitting to you the ***Town of Sudbury Preliminary Budget and Financing Plan for Fiscal Year 2008***. As you know, there are two budget documents that are prepared each fiscal year for the Town of Sudbury. The first document is this ***preliminary*** budget, and it is not a balanced budget proposal, but rather the compilation of all the budget requests, along with the preliminary revenue estimates. This budget document is where you can find all the financial obligations, requests and resources that are the building blocks for our work together to craft a balanced budget to present to Town Meeting for appropriation and enactment. After Town Meeting concludes, we will produce a ***Town of Sudbury Appropriated Budget and Financing Plan for Fiscal Year 2008*** and that document will contain the balanced budget as appropriated for the upcoming fiscal year.

Sudbury is fortunate to have a group of elected and appointed officials who believe in the concept of working together to arrive at the best possible final budget. Developing a budget always represents a series of balances that must be achieved: between the needs of the Town departments and the School departments, between operating needs and capital needs, between meeting today's services demands and protecting our future by preserving our reserves and hard won financial security, and most of all between maintaining the critical investments in our quality of life, and being mindful of the tax burden such an investment puts on our citizens and businesses.

One of our most important obligations in this process is to be as transparent and comprehensive as we can to our residents as to why the level of financial resources is needed each year, and what is accomplished with those resources. This budget document, along with the budget documents prepared by the Sudbury Public Schools, the Lincoln-Sudbury Regional High School, and the Capital Improvement Planning Committee, is one of our best ways of meeting that obligation.

I am pleased to report that the Town of Sudbury's budget document has received national recognition. The Government Finance Officers Association has awarded the Town of Sudbury the Distinguished Budget Presentation Award for the ***Town of Sudbury Appropriated Budget and Financing Plan for FY07***. This award is the highest form of recognition in governmental budgeting and represents a significant achievement for the Town. Sudbury is one of only seven local governments in Massachusetts to have earned this recognition.

This award means that the budget document achieved our goal of serving four primary missions – as a policy document, as a communications device, as a financial plan and an operations guide. We hope that readers and users of the budget will find it useful for these purposes.

The education of the children of Sudbury remains the primary focus of the Town, comprising 74% of the operating budget in FY07, and likely to remain at least at the same percentage of the FY08 budget. Nevertheless, the Town Departments must continue to receive sufficient resources to continue the work of protecting public safety, public assets and a special quality of life, plus we must continue to strategically add resources where mandates have been put upon us, where the public safety of the community must be protected, and because of our role as the entity that generates nearly all of the revenue to support the budgets of all cost centers. We run very lean on the Town side yet I am proud of all that we accomplish. Detailed information on the goals and accomplishments of the Town departments can be found in Section Four of this budget.

As you review the Town ***of Sudbury Preliminary Budget and Financing Plan for Fiscal Year 2008***, you will not be surprised to learn that we begin our budget balancing challenge with a gap between voted budgets and available revenue that exceeds 3.6 million dollars. Hopefully, this document will help you better understand the reasons for this gap, and provide you with food for thought as we begin the work of working together to develop a final balanced budget.

A document of this size and detail represents an enormous amount of effort. This year's budget is the result of months of effort from many department heads, led by Finance Director/Treasurer-Collector Andrea Terkelsen. Peter Andersen, senior clerk in the Treasurer-Collector's office, was kind enough to assist with assembly of the document and creation of many of the tables and graphics found herein. My deepest thanks to all Town staff who work so diligently on developing and preparing budget requests that look to use tax resources as efficiently and carefully as possibly while accomplishing their mission of serving the residents of Sudbury.

Sincerely

*Maureen G. Valente*

Maureen G. Valente  
Town Manager

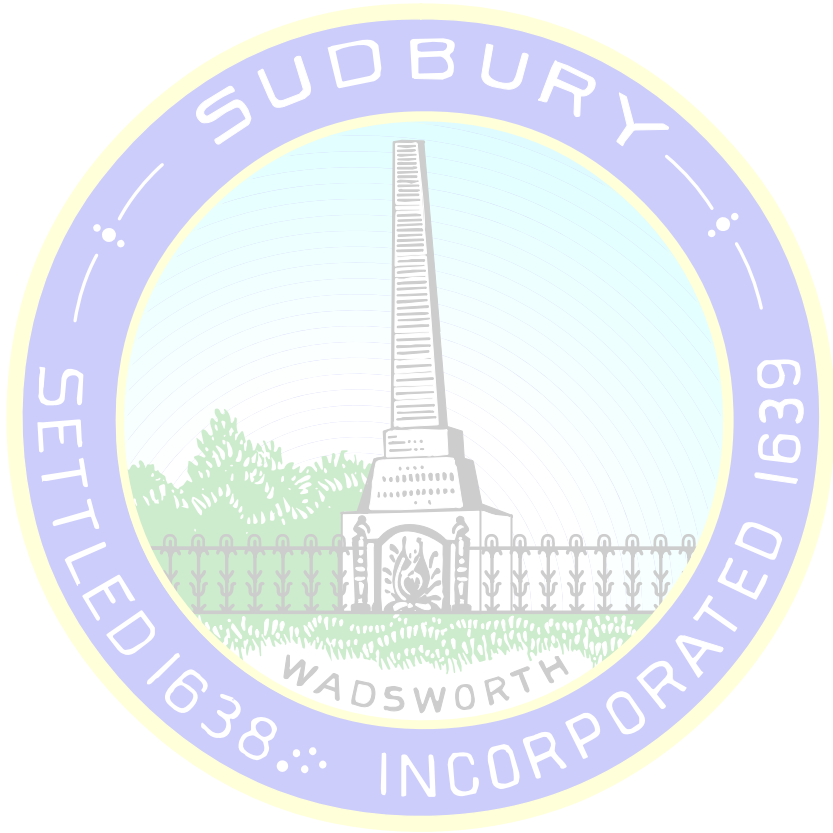
## Questions and Answers on Using This Budget Document

- Question:** **Where can I find the bottom line for FY08 Preliminary budget?**  
**Answer:** Start with Table 1, Summary of all Budget Requests, found on page 32 in Section 3. This summary sheet has the voted budget request of all cost centers plus other financial obligations of the Town that must be covered, along with the preliminary revenue estimates for FY08.
- Question:** **Where do I find information about the Town's revenues?**  
**Answer:** Start with the Revenue Projections on page 44 in Section 3. This lists the projected revenues, and gives a brief description of each revenue source and how we made assumptions about it for FY08.
- Question:** **How much does the Town's revenue base grow each year?**  
**Answer:** Beginning on page 38 is a discussion of what has been happening in the Town's revenue base for the period FY2001-FY2006.
- Question:** **How much of the Town's budget is for the cost of benefits for employees such as Health Insurance and Pensions?**  
**Answer:** The specific amounts recommended for the Town and Sudbury Public Schools for these items can be found on page 144. The specific amounts for the Lincoln-Sudbury Regional High School can be found in their budget document, which is a separate document. You can also see tables on pages 34 and 35 in Section 3 which looks specifically at a six year history of these costs.
- Question:** **How can I find out the goals of the Town and how the budget is developed to try to accomplish those goals?**  
**Answer:** There are different goals set by different entities. The goals of the Board of Selectmen are found on page 3 in Section 1. These goals provide direction to the Town Manager and department heads for the fiscal year and over the long term. Also, each Town department head works with the Town Manager to set goals for the year and in each departmental budget request in Section 4 you can find FY08 goals as well as FY06/07 accomplishments.
- Question:** **Where can I find information about budgeting for capital projects, like building improvements and new DPW vehicles?**  
**Answer:** The capital budget is found in Section eight of this document.
- Question:** **How can I find out more about the budget balancing process?**  
**Answer:** On page 16 of this document is a listing of the budget hearings that will be held by the Finance Committee. Additionally the Finance Committee will try to post as much information on the Town's website as possible. See [www.sudbury.ma.us](http://www.sudbury.ma.us).



# Section One

# OVERVIEW OF THE TOWN OF SUDBURY





## TOWN OF SUDBURY

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

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

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

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

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

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

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

**Enhance Relationships and Communications**

**Emphasize Long-Term, Strategic Planning**

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

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

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

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

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



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

- 1. *Ensure that the FY08 budget planning provides for the future financial sustainability of the Town of Sudbury and protects core municipal and educational services.***

Progress: The Selectmen will be carefully assessing the budget requests of the Town Manager, the Sudbury Public Schools, the Lincoln-Sudbury Regional High School and the Capital Improvement Planning Committee to determine what level of services can reasonably be expected to be sustained by the Town in the future. There are many services that residents desire from the Town but the Town cannot fund them all without negatively affecting our future financial health. At this point, it is too early to determine if available revenues can sustain level services for the Town and the schools, or cope with the demands of growing enrollments and mandates.

Budget Implications: It is the responsibility of the Board of Selectmen to vote if and when to call for a question to be put on the ballot asking voters of the Town if they will approve an override of the limitations of Proposition 2 ½, and increase their own taxes to support services. If the Board does not call for such a question, then budget proposals are limited to revenue availability.

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

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

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

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

**3. *Develop a Route 3 Master Plan***

Progress: The Wastewater Technical Advisory Committee continues to meet quarterly, with their consultant Weston & Sampson, to review parcels for potential wastewater sites, and to discuss alternatives to conventional septic systems for the business properties. The committee has spent considerable time and some funds on review of specific parcels, but still do not have a feasible site. Weston & Sampson are investigating the potential of pumping wastewater longer distances in hopes of finding a parcel outside the study area.

Budget Implications: Funds for the work of the Technical Advisory Committee are already available from prior Town Meetings and donations from the commercial sector of Town, and should be sufficient until a suitable site is identified.

**4. *Develop a detailed Five Year Capital Plan with Financing Options***

Progress: The FY08 Capital article has been voted by the Capital Improvement Planning Committee (CIPC) for submission to the Finance Committee and the Board of Selectmen. And all department heads have submitted their five year departmental requests. Using this information to create an actual multi-year capital plan with financing options will occur between January and February of 2007.

Budget Implications: See the Recommendations of the CIPC.

**5. *Create a Solid Waste Management Options Committee***

Progress: The Board approved a mission statement for the new committee and advertised for residents interested in serving on this committee. Thus far they have interviewed candidates for the committee, and will soon be voting on which candidates to appoint to this committee.

Budget Implications: None for FY08, but if the committee recommends any changes to how the Town handles solid waste management, there could be FY09 budget implications.

**6. *If feasibility study indicates readiness, have Police Station question ready for 2007 Town Meeting; develop efforts to educate Sudbury residents on the plans and needs***

Progress: The consultant has finalized a feasibility report to the Permanent Building Committee indicating the project is feasible on the Hudson Road site, and provided information for the Selectmen to present to the Town for approval for the project to begin.

Budget Implications: None for the FY08 operating budget, but debt service will begin in FY09 if the project is approved. The Capital Plan calls for the debt service for this project to replace other projects that are being paid down/off so that there is no net increase on the tax bills for initiation of this project.

**7. *Update the Cemetery rules, regulations and customer service standards.***

Progress: The DPW has worked with a consultant to develop draft documents on these items. The DPW is now revising these draft documents a final time and will be presenting to the Board of Selectmen after the first of the year.

Budget Implications: None at this time. All changes will be consistent with current financing for the Cemetery division contained in the FY08 budget proposal.

**8. *Develop new options for the Board of Selectmen to communicate their goals, plans and activities to residents and for residents to give them feedback on Town efforts***

Progress: The Board has approved a concept developed by the Town Manager for monthly cable shows. The first show has yet to be scheduled due to very crowded calendars for the Board/Selectmen, but should be scheduled right after the first of the year.

Budget Implications: None.

**9. Prepare a report that analyzes and documents the financial impacts of the SRC and ISD bylaws to be added to the C.A.R.E. program**

Progress: The Director of Planning and Community Development is working on this analysis.

Budget Implications: None.

**10. Find a citizen volunteer to head the Town's No Place for Hate effort.**

Progress: The Assistant Town Manager is working on finding this volunteer but has not had any success yet.

Budget Implications: None.

**11. Begin work of the newly created Housing Trust**

Progress: A draft trust has been created and staff is working toward approval of the final trust after the first of the year. The Sudbury Housing Trust was formed by 2006 Annual Town Meeting vote (Town Meeting Article). The objective of the Trust is to increase affordable and community housing as defined in the Sudbury Housing Plan, and the Trust has powers and duties that enable it to accomplish the objective. Recruitment for Trustees is also ongoing until February 2007.

Budget Implications: All the financial needs and efforts of the Trust will be supported through non-budget generation of funding. Community Preservation Act funding, fees for acting as monitoring agent for Affordable housing agreements and other such opportunities are planned to support the Trust.

**12. Create a new Traffic Safety Advisory Committee**

Progress: The mission statement for this new committee has been rewritten by staff and will be presented to the Selectmen at the meeting on December 19, 2006.

Budget Implications: None at this time, although the addition of one patrol officer in the FY07 budget allowed for the designation of a safety officer to work with this committee.

**13. Continue efforts to get a traffic control light installed at fire Station 2 on Route 20**

Progress: No activity is taking place regarding the Station 2 traffic light. Mass Highway denied the Town's request in March of 2005, and reaffirmed this denial during a telephone follow up conversation with Fire Chief Ken MacLean. Raytheon was also denied a proposed light at their location. It is our understanding that Mass Highway is interested in improving flow of traffic which is hindered by the addition of any type of traffic light.

Budget Implications: None

**14. Examine potential impact of Wayland Town Center Project on Sudbury**

Progress: The Sudbury Board of Selectmen has met with the Wayland Board of Selectmen for preliminary discussion of this project and the Sudbury Board of Selectmen voted to ask the developer to meet with them. Sudbury is monitoring the development plans by use of a volunteer observer.

Budget Implications: None at this time. The Board will be discussing with developer any potential negative impacts on Sudbury's commercial base.

**FY06 goals still on Selectmen's list**

**1. Examine options to increase oversight of town owned parks and public spaces**

Progress: The Town Manager is working with the Public Works Department and the Parks and Recreation Department, as well as other Departments such as the Goodnow Library, the Fire Department and the Police Department, to assess how we are currently managing public landscaping surrounding our office buildings. We also are examining

how to best manage the landscaping at the Sudbury Public Schools, the Heritage and Grinnell Parks, and our many traffic islands. We have many dedicated volunteer groups in town, such as the Permanent Landscape Committee and the garden clubs, who work on our public spaces as well. Finally, we have a “main street” on Route 20/Boston Post Road, which we need to consider how to make as attractive as possible. This is a big project to figure out how, with limited funding and many entities involved, we can increase oversight and improve the appearance of our town owned public spaces. We still need to determine how best to create a committee to help with oversight of these public spaces.

Budget Implications: The Town Manager requested funding to hire outside contractors to maintain landscaped areas at Sudbury public schools in FY07, and the results have dramatically improved the appearance of the school buildings. For FY08, the Town Manager is requesting funds to supplement this contract so that Town buildings can also be added to this effort.

**2. Continue legal efforts to end the pollution of the Hop Brook Ponds**

Progress: The Board completed the litigation it initiated in 2004 to compel the City of Marlborough to stop discharging pollution from their Wastewater Treatment Plant into the Hop Brook water system and perform remediation and restoration to the ponds that have been so degraded due to this pollution. On October 19, 2006, EPA and DEP jointly issued a final permit modification to the Marlborough Easterly Wastewater Treatment Plant for the discharge of treated wastewater into Hop Brook. Issuance of this permit is a major development in the multi-year effort to achieve improvements in the effluent that is discharged from the MEWTP into the Hop Brook System. Marlborough must undertake facility improvements planning, design and construction on a schedule over the next seven years, leading to complete construction of the facility improvements by June 2013.

Budget Implications: We have included what we hope are enough funds in the legal budget to deal with the Town’s efforts to address remediation of the damage already done to our waterways. Funding has been obtained from the Community Preservation Act to conduct the annual harvesting program for Carding Mill Pond, and the Town will be examining reports from the Army Corps of Engineers on the possibility of dredging or other approaches for cleaning up the pollutants.

**3. Examine ways for the Town to be more fuel and energy efficient**

Progress: New boilers installed in the Fairbank Building and the Flynn Building should be more energy efficient.

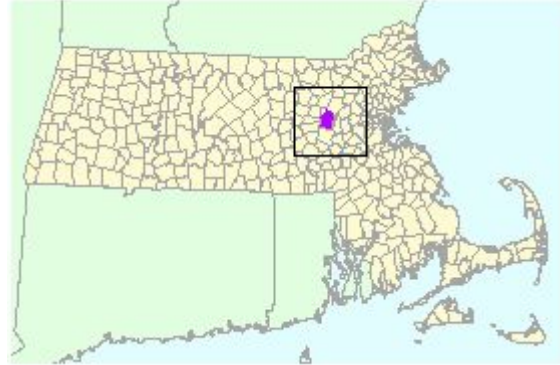
Budget Implications: None at this time. We will continue to examine those options that have potential payback to the Town for the expenditure.

## SUDBURY AT A GLANCE

SETTLED:	1638 - Incorporated 1639; 367 years old in 2006	
POPULATION:	18,207	Voters: 11,560
AREA:	24.7 Square Miles	
FY2007 BUDGET:	Operating Budget:	\$71,777,149
	Other Appropriations:	2,089,811
	Borrowing:	<u>-0-</u>
	TOTAL:	\$73,866,960
TAX RATE:	FY2007: \$13.12 Residential; \$20.29 Commercial/Ind./Personal Property FY2006: \$13.55 Residential; \$21.71 Commercial/Ind./Personal Property FY2005: \$13.46 Residential; \$20.53 Commercial/Ind./Personal Property	
GOVERNMENT:	Selectmen/Town Manager with open Town Meeting	
PUBLIC LIBRARY:	Goodnow Library, member of Minuteman Library Network	
SCHOOLS:	Four elementary schools, one middle school, Lincoln-Sudbury Regional High School and Minuteman Regional Vocational Technical High School	
PUBLIC SAFETY:	Full-time Fire Department with three stations, also provides emergency ambulance service to hospitals Full-time Police Department	
RECREATION:	Programs offered year round; informational brochures mailed to all Sudbury residents four times a year. Recreation buildings include the Atkinson Town Pool, the Fairbank Community Center, which houses the Teen Center, Park and Recreation Office and the Fairbank Senior Center. Major recreation areas include Davis Field, Featherland Park, Feeley Field, and Haskell Recreation Area. Facilities include a toddler playground, tennis courts, basketball courts, golf putting green, sand volleyball court, outdoor ice skating area, and fields for: baseball, field hockey, lacrosse, softball, and soccer.	
HOSPITALS WITHIN 10 MILES:	Emerson Hospital, Concord Metrowest Medical Center/Framingham Union Campus, Framingham UMASS Health System-Marlborough Hospital, Marlborough.	
HEALTH/HOSPICE CARE SERVICES:	Parmenter Health Services, Inc.	
HOUSES OF WORSHIP:	Baptist, Catholic, Congregational, Episcopal, Jewish (2), Lutheran, Methodist, Presbyterian, Swedenborg Chapel, Unitarian, and non-denominational.	
UTILITIES:	Electrical service: NSTAR Natural Gas service: Keyspan Water: Sudbury Water District Telephone service: Verizon Cable Service: Comcast of Massachusetts, Inc.	

## Governmental Structure

The Town of Sudbury, Massachusetts (the “Town”) was incorporated in 1639. It is located in Middlesex County, about 20 miles west of Boston. The Town is governed by an open Town Meeting, an elected Board of Selectmen, and an appointed Town Manager. Local legislative decisions for the Town are made by an open town meeting.



The Town implemented its current charter on July 1, 1996. This charter provided for appointment of a Town Manager by the Board of Selectmen. The Town Manager has broad responsibility for day-to-day management of Town affairs, as well as preparation of annual operating and capital budgets. The Town provides general governmental services for the territory within its boundaries, including police and fire protection, streets, library, parks and recreation. For budgeting purposes, the Town services are divided into six program areas, and the Town Manager has authority to move funds as needed within a program area, but not to transfer funds between these areas. These areas are as follows: General Government; Public Safety; Public Works; Human Services; Culture and Recreation; and Unclassified.

The Sudbury Water District of Sudbury, which is entirely separate from the Town, provides water services to 87% of the territory located within the Town. The Town has an inter-municipal septage disposal facility agreement with the Town of Wayland. The facility is operated as an enterprise fund; however, the Town remains liable for its portion of any debt (50 percent) in the event of a revenue shortfall. The facility does not have any debt outstanding as of June 30, 2006.

The Town provides education in grades K-8 through the Sudbury Public Schools; the Lincoln-Sudbury Regional School District provides education in grades 9 through 12. The Minuteman Regional Vocational Technical High School provides vocational technical education in grades 9 through 12. Capacity of the Town’s schools has been significantly increased in recent years. Elementary school capacity increased from 1,804 to 2,486; capacity of the middle school increased from 769 to 1,135. The regional high school has built a new, larger facility to replace the existing building and the capacity of the new high school is 1,850. The older facility had 1,420 students enrolled in its final year.



## Economic and Demographic Characteristics of Sudbury

### Property Valuation

Classification of Property	FY04 Assessed Valuation	% of Total Assessed Valuation	FY05 Assessed Valuation	% of Total Assessed Valuation	FY06 Assessed Valuation	% of Total Assessed Valuation
Residential	\$ 3,345,758,101	94.35%	\$ 3,389,867,806	94.14%	\$ 3,734,317,130	94.37%
Commerical	\$ 116,426,964	3.28%	\$ 123,810,145	3.44%	\$ 128,328,335	3.24%
Industrial	\$ 50,564,200	1.43%	\$ 50,571,100	1.40%	\$ 52,194,100	1.32%
Personal	\$ 33,246,870	0.94%	\$ 36,724,221	1.02%	\$ 42,090,996	1.06%
<b>Total</b>	<b>\$ 3,545,996,135</b>	<b>100.00%</b>	<b>\$ 3,600,973,272</b>	<b>100.00%</b>	<b>\$ 3,956,930,561</b>	<b>100.00%</b>

### Largest Taxpayers

Largest Taxpayers, FY06	Nature of Business	Total Assessed Valuation, FY06	Amount of Tax	Percent of Levy
Boston Edison	Utility	\$24,389,698	\$528,701	0.54%
Raytheon Corporation	R & D	\$14,829,800	\$321,955	0.40%
David F. Bolger	R & D	\$11,641,900	\$252,746	0.32%
Pasquarello & Spertner	R & D	\$11,201,800	\$243,191	0.29%
Sudbury Crossing	Shopping Center	\$9,871,300	\$214,306	0.26%
Der Manuelian Haig TRS	Shopping Center	\$7,799,400	\$169,325	0.21%
GPT - Longfellow Glen	Apartments	\$11,262,800	\$157,149	0.30%
Dowie William J. Trustee		\$10,622,500	\$146,854	0.27%
Richard J. Bosse Holdings LLC	Sports Complex	\$5,753,500	\$124,908	0.15%
1776 Plaza Limited Partnership	Shopping Center	\$5,710,200	\$123,968	0.15%
		<b>\$113,082,898</b>	<b>\$2,283,103</b>	<b>2.89%</b>

### Largest Employers

Largest Employers, FY06	Nature of Business	Approximate Current Employees
Raytheon Corporation	R & D	2000
Sudbury Farms	Supermarket	250
Lincoln-Sudbury Regional School District	School	227
Chiswick Trading Co.	Packaging	178
Wayside Inn	Restaurant/Inn	150
Star Market	Supermarket	135
Sudbury Pines Nursing Home	Nursing Home	104
Wingate Nursing Home	Nursing Home	40

Household Income Distribution 1999, per US Department of Commerce

Income for Households	Households	Percent
Less than \$10,000	164	3.0%
\$10,000 - \$24,999	299	5.4%
\$25,000 - \$49,999	509	9.2%
\$50,000 - \$74,999	584	10.6%
\$75,000 - \$99,999	645	11.7%
\$100,000 - \$149,999	1,256	22.7%
\$150,000 or more	2,066	37.4%
<b>Total</b>	<b>5523</b>	<b>100.0%</b>

Population Composition, per US Department of Commerce

Population Composition 2000	Number	Percent
Under 5 years	1,489	8.8%
5 years to 19 years	4,223	25.1%
19 years to 65 years	9,476	56.3%
65 years and older	1,653	9.8%
<b>Total</b>	<b>16,841</b>	<b>100.0%</b>

Educational Attainment, per US Department of Commerce

Years of School Completed	Number	Percent
Less than 9th grade	81	0.7%
9th to 12th grade, no diploma	317	2.9%
High School Graduate	970	9.0%
Some College - no degree	1,058	9.8%
Associate's degree	617	5.7%
Bachelor's degree	3,719	34.4%
Graduate or professional degree	4,062	37.5%
<b>Total</b>	<b>10,824</b>	<b>100.0%</b>

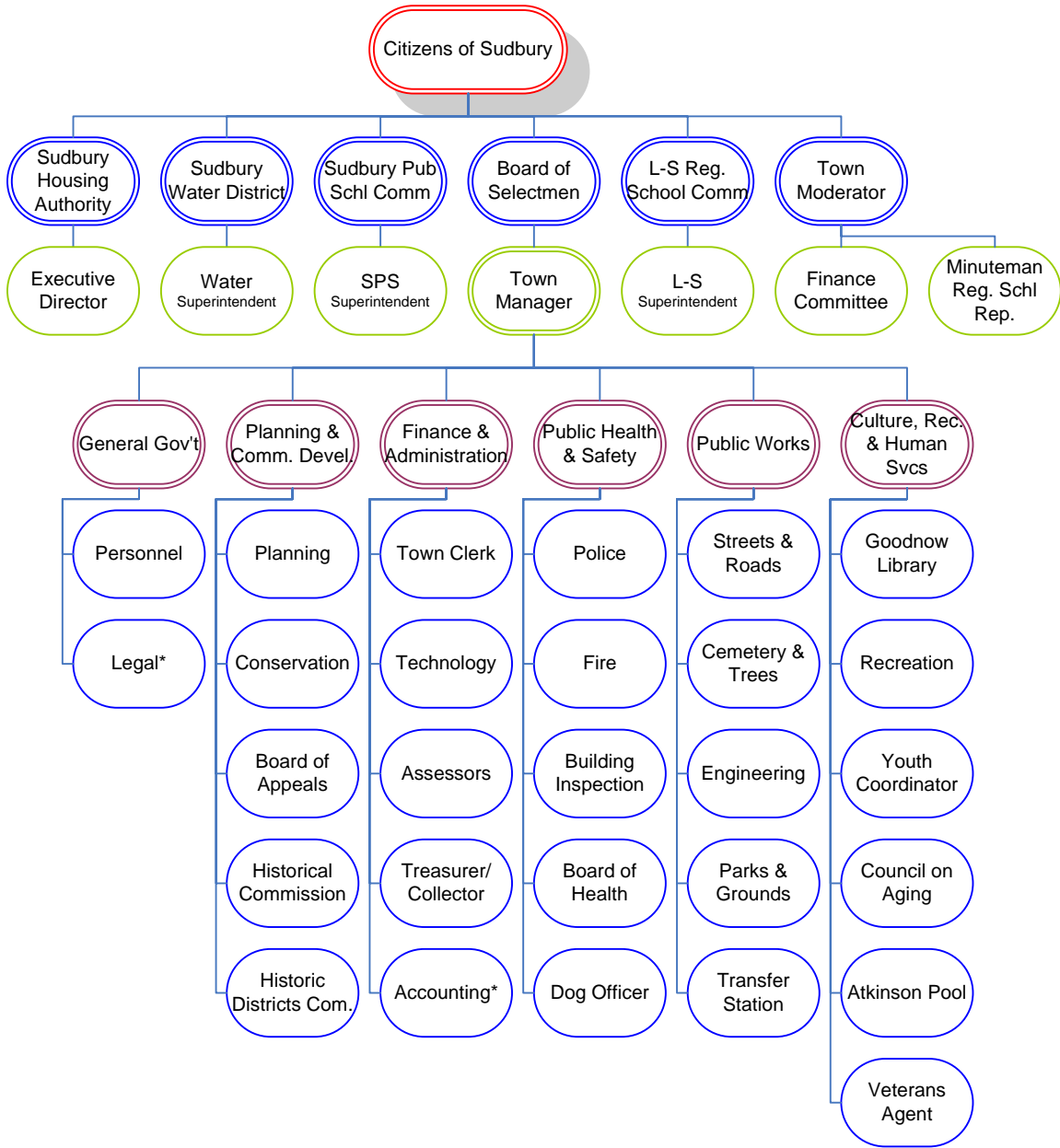
**EMPLOYEE HEADCOUNT**  
(Full Time Equivalents)

<b>Cost Center</b>	<b>Actual FY 06</b>	<b>Fin. Comm. Recmd. FY 07</b>	<b>Voted/ Request FY 08</b>	<b>Inc. V. FY07</b>
Sudbury K-8 Schools	413.93	414.93	419.25	4.32
L.S.R.H.S.**	207.00	210.70	216.18	5.48
Public Safety	78.40	79.80	80.80	1.00
Public Works	33.80	34.80	35.30	0.50
General Government	31.80	32.30	33.90	1.60
Human Services	7.30	7.30	7.80	0.50
Culture & Recreation	30.00	30.00	32.10	2.10
Town Sub-total	181.30	184.20	189.90	5.70
<b>TOTAL</b>	<b>802.23</b>	<b>809.83</b>	<b>825.33</b>	<b>15.50</b>

\* Estimates as of the date of this printing subject to further review.

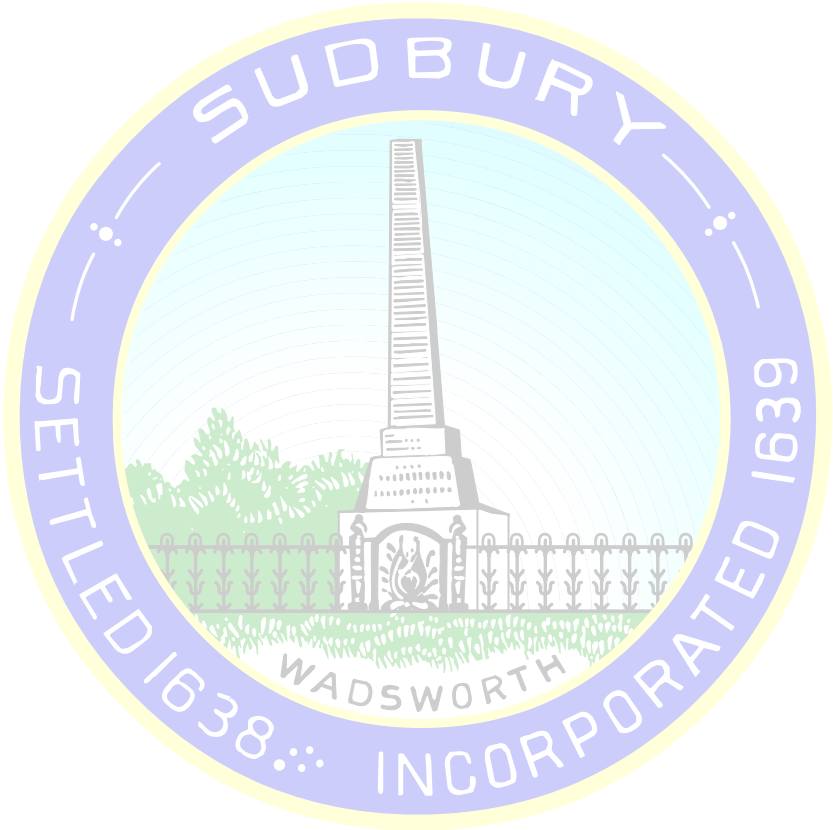
\*\* Sudbury's estimated share of the L.S.R.H.S. operating budget for FY08 is 85.33%. Revenues other than the Town's assessments support salaries for 6.00 FTE positions, including out-of-District tuition and grants.

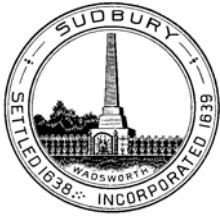
# Organizational Chart of the Town of Sudbury



# Section Two

# CALENDARS, PROCEDURES & POLICIES





# Town of Sudbury

## Finance Committee

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September 28, 2006

Board of Selectmen, Town of Sudbury  
Ms. Maureen Valente, Town Manager, Town of Sudbury  
Ms. Jane S. Santinelli, Sudbury Public Schools Committee, Chairman  
Dr. John R. Brackett, Sudbury Public Schools, Superintendent  
Mr. Mark Collins, Lincoln Sudbury Regional School District Committee, Chairman  
Dr. John M. Ritchie, Lincoln-Sudbury Regional High School, Superintendent  
Mr. Paul Lynch, Minuteman Regional High School Representative

Dear Town and School Leaders and Administrators:

The Finance Committee (the "Committee") looks forward to working with you on the FY08 budget. The municipal budgeting process never seems to get any easier. The Town continues to battle with cost increases, student and overall population growth, constrained revenue streams, and financial burdens to the taxpayers resulting in difficult choices to be made. We applaud the officials and representatives of the Town and its various committees for working together in the past in the best interests of the Town. It is the Committee's desire for everyone to continue in this vein as we all work together through this year's budget process.

The budget process, definitions and formats previously established will continue, as consistency is an inherently necessary function in budgeting. In previous years, the Committee has requested various budget scenarios be prepared and presented. We also issued a sensitivity analysis with our guidelines memo, based on certain revenue and cost assumptions in an effort to give an early indication of potential budget shortfalls. This year, we will be foregoing the sensitivity analysis, as we believe that our revenue projections have been overly conservative due to the early timing in the process, prior to more complete information being available. This year, we will wait until the latter half of November when we hope to have a clearer picture of free cash, local receipts and available funds. At that time, we will prepare a revenue projection in order to determine what budget increase or decrease will allow for a required no override budget.

Rather than request that various budget scenarios be prepared, we are requesting a single budget be submitted to Andrea Terkelsen by **December 15<sup>th</sup>** (preferably on 3-hole punched paper), assuming a 3.0% increase over the FY07 budget (excluding pension and insurance items, which should be reflected at projected total cost) as well as details of the impacts of this budget to services and programs. In no way should the 3.0% increase be considered the Finance Committee's projection of a no override budget as current projections indicate a budget shortfall under a 3.0% scenario. We will notify you of our "no override" projections as soon as we are able so that you may prepare to present plans to address any revisions necessary to obtain a required "no override" budget. A cost center may also submit one other budget it wishes the Committee to consider.

The biggest change to our budget guidelines process will be the heightened role we expect the budget liaison meetings to play. Rather than wait until budget submissions, the Committee has compiled a standard list of questions and information requests to be reviewed at these budget liaison meetings. It is our intention to have the FinCom liaisons present the answers and information requested in this letter to the Committee at its meeting on **November 20<sup>th</sup>**. We also request that the cost centers have their own representatives at this meeting to elaborate or clarify, as necessary, and insure a thorough understanding by the entire Committee of the information requested.

By **November 6<sup>th</sup>**, please provide to your FinCom budget liaisons the following information:

- Based upon the FY07 budget, please provide information about the status and projected full year cost, including benefits, of all new hiring made within the budget, with specifics as to positions. Also provide information about new hiring not included in the budget. In addition, please provide the total number of actual and budgeted FTE's by position.
- Please provide the highlights and FY07 budgetary impacts of each collective bargaining agreement approved since the April, 2006 Town Meeting, as well as the projected ramifications to the FY08 budget.
- Please provide details on grants in excess of \$5,000 received for FY07, including grantor, amount, use of these funds, and likelihood of continuation.
- Please provide details of costs and events, which were not anticipated and are impacting the FY07 budget and their potential to impact the FY08 budget.
- Please provide an update of any cost savings/revenue enhancement programs or initiatives presented during the FY06 and FY07 budget cycles.
- Please provide information about any cost savings/revenue enhancement programs or initiatives being contemplated for the FY08 budget and their projected monetary impacts.
- Please provide information about upcoming or recently completed insurance and benefits program renewals.
- Please provide actual student enrollment growth statistics vs. budgeted.

From this information, the Committee will look to determine if costs are tracking in line with budgeted expectations, what unexpected costs or events have occurred, and what impacts these may have on FY08 budget requests. We also suggest that a liaison meeting be scheduled **subsequent to November 20<sup>th</sup> and prior to any budget presentations that may need to be made to others** so that all parties have the opportunity to discuss issues that may have been raised at the November 20<sup>th</sup> FinCom meeting. We realize this process differs from the past, but we hope it will allow for greater input and information flow prior to formal hearings in January 2007.

Your cooperation is very much appreciated.

Members of the Finance Committee

Cc: Myron Fox, Town Moderator  
Robert Steinbrook, Town of Lincoln Finance Committee, Chairman

**Sudbury Finance Committee**  
**FY08 Budget Hearings Schedule (Revised 12/18/06)**

(All Hearings/Meetings begin @ 7:30 pm unless otherwise noted)

Monday	January 8	Budget Process Presentation/ Revenue Projection Presentation	Town Hall
Thursday	January 11	Town of Sudbury Budget Hearing/ Capital Improvements Planning Committee Hearing	Town Hall
Monday	January 15	(Martin Luther King Holiday)	
Thursday	January 18	Lincoln-Sudbury Regional School District Budget Hearing/ Sudbury Public Schools Budget Hearing	Town Hall
Monday	January 22	Minuteman Regional Vo-Tech/ CPA	Town Hall
Thursday	January 25	Joint meeting with Lincoln FinCom & LS School Committee/ Presentation on Proposed New Police Station	Town Hall
Monday	January 29	Revenue Update/ Other Articles	Town Hall
Tuesday	January 30	Joint meeting with Sudbury Board of Selectmen	Town Hall
Thursday	February 1	FinCom Deliberations, Final Votes*, Discussion of Warrant Reports	Fairbank
Friday	February 16	FinCom Reports due to Town Manager	

\*Final Vote by Sudbury FinCom must be taken no later than Friday, February 9, 2007 for Non-Override Budget.

Override Budget (if any) and Warrant Article positions to be published.



## **Phases of Budget Preparation and Development**

### ***Policy/Strategy Phase***

- Based on long range planning efforts of the Town, such as the Master Plan, as well as current needs, the Board of Selectmen set goals for next fiscal year
  - Completed May 26, 2006
- Town Manager sets goals
  - Completed July, 2006
- Town Manager/Department heads jointly set their goals
  - Completed September, 2006

### ***Financial Capacity Phase***

- Short range forecast/sensitivity analysis conducted (FY07 specific)
  - By September 8, 2006
  - Andrea Terkelsen
  - Used in FinCom Instructions, Financial Summit and Financial Condition Analysis
  - Follow format already established
- Long range forecast/sensitivity analysis updated (3 year forecast)
  - By September 29, 2006
  - Andrea Terkelsen & Maureen Valente
  - Used in Financial Summit and Financial Condition Analysis
  - Follow format already established
- Financial condition analysis updated
  - By October 13, 2006
  - Andrea Terkelsen, Maureen Valente,
  - Format to be discussed, Financial Summit November 28, 2006
- Review of progress vis-à-vis policies and projects from prior years
  - By October 18, 2006
  - Town Manager Maureen Valente
  - Format to be developed

### ***Needs Assessment Phase***

- Departments review their current condition, goals, programs and needs
  - Town Manager's budget memo finalized, sent out by October 13, 2006
- Departments prepare workload indicators, performance indicators, other statistics
  - Andrea Terkelsen and Maureen Valente work with selected department heads
- Departments submit budget requests to Town Manager
  - Departments submit budget request to Andrea Terkelsen by November 2, 2006
- Schools submit budget requests to School Committees
- Town Manager Seeks CIP requests from all department and committees
- Finance Director provides debt information
- Determine CIP priorities, and recommend funded projects to Town Manager
- Update CIP

### ***Review/Development Phase for Town Budget***

- Town Manager and her budget team review requests
- Town Manager holds Departmental hearings
- Andrea Terkelsen and Maureen Valente
  - November 9 – 14, Departmental budget hearings
  - Andrea Terkelsen, Maureen Valente, Fin Com liaisons
- Preliminary Town operating budget developed, presented to Selectmen
  - December 15, 2006 Board meeting
- Final Town operating budget assembled and published
  - By December 29, 2006
- Schools hold budget hearings

- School Committees vote final school budgets

***Development for Fiscal Year Annual Budget and Financing Plan***

- Town Manager and Finance Director receive School budget requests
  - By December 15, 2006
  - Sudbury Public Schools
  - Lincoln-Sudbury Regional High School
  - Minuteman Regional Vocational- Technical High School
- Town Manager and Finance Director finalize revenue projections, state aid projections
  - By December 15, 2006
- Town Manager and Finance Director finalize charges from state, Assessors overlay etc.
  - By December 20, 2006
- Fiscal Year Annual Budget and Financing Plan delivered to FinCom
  - By December 29, 2006
  - To be published on web

***FinCom Review Phase***

- FinCom holds hearings on Town, School, capital budget requests
  - January 2007
- FinCom holds hearing on all money articles
  - January 2007
- FinCom votes on budget
  - February 2007
- FinCom votes on all money articles
  - February 2007

***Appropriation Phase***

- Town Meeting begins, votes appropriations
  - April 2007
- Town Meeting approves all bonding and capital articles
  - April 2007
- Town Meeting approves any budget amendments for current fiscal year, if any

***Enactment Phase***

- As Appropriated Budgets prepared, distributed
  - June 30, 2007

## FY08 Budget Calendar

This calendar describes the steps leading to adoption of the budget for those accounts overseen by the Town Manager and requiring appropriation by the Town Meeting. The School Superintendents and School Committees carry out similar steps leading to Town Meeting.

### 2006

- May 26 Board of Selectmen holds goal setting session
- September 8 Town Manager and Finance Director prepare preliminary three year forecast model, draft sensitivity analysis for use by Finance Committee
- September 8 Town Manager issues capital budget instructions
- September 28 Finance Committee Budget memorandum distributed to all cost centers (Town, SPS, LSRHS and CIP)
- October 13 Town Manager issues budget instructions to department heads, committee chairs
- October 13 Capital requests due to Town Manager
- October 16 CIP draft compilation due to Department Heads
- October 20 CIP staff committee meets
- October 27 CIP staff committee report sent to CIPC for consideration
- November 2 Department & Committee Operating budget requests due at Finance Director's Office
- November 9-14 Budget hearings with Town Manager and Finance Director
- November 29&30 CIP Citizens Committee holds hearing
- November 30 CIP Citizens Committee votes projects list for submission to Board of Selectmen
- December 4 CIP Committee draft report finalized to Town Manager
- December 15 Town Manager, Lincoln-Sudbury Regional High School, Sudbury Public Schools and CIP Committee budgets due to FinCom, Board of Selectmen
- December 15 CIPC report forwarded to Board of Selectmen for review
- December 19 CIP Committee presents report to Board of Selectmen for review
- December 29 ***FY2008 Budget and Financing Plan*** delivered to Finance Committee, Board of Selectmen

### 2007

- Jan 8 – Jan 30 Public hearings on budget requests held by Finance Committee
- February 1 Final vote of Finance Committee
- March 9 Town Meeting Warrant and Report of the Finance Committee mailed to residents
- April 4 Town Meeting - consideration of FY08 operating and capital budget; enactment of appropriations, budget amendments to FY08 budget if any
- July 1 FY2008 Budget takes effect

# Town of Sudbury Board of Selectmen Budget and Financial Management Policies

## **Introduction**

The Town of Sudbury has an important responsibility to carefully account for public funds, to manage municipal finances wisely, and to plan and provide for the adequate funding of services desired by the public and as required by laws, rules, or regulations, including the provision and maintenance of public facilities and improvements. The budget and financial goals and policies set forth by the Board of Selectmen in this document are intended to establish guidelines for the continued financial strength and stability of the Town of Sudbury.

### **Goals**

Goals are broad, fairly timeless statements of the financial position the Town seeks to attain. The financial goals for the Town of Sudbury are:

- To provide full value to the residents and business owners of Sudbury for each tax dollar by delivering quality services efficiently and on a cost-effective basis.
- To preserve our quality of life by providing and maintaining adequate financial resources necessary to sustain a sufficient level of municipal services, and to respond to changes in the economy, the priorities of governmental and non-governmental organizations, and other changes that may affect our financial well-being.
- To maintain our top level AAA credit rating
- To guide Town decision makers on management and policy decisions which have significant fiscal importance.
- To set forth operating principles that minimizes the cost of government and financial risk.
- To employ balanced and fair revenue policies that provides adequate funding for desired programs.
- To maintain appropriate financial capacity for present and future needs.
- To promote sound financial management by providing accurate and timely information on the Town's financial condition.
- To ensure the legal use of financial resources through an effective system of internal controls.

To achieve these goals, the Board of Selectmen adopts the following policies.

### **Operating Budget Policy**

Sound financial practice and the desire to maintain a strong credit rating dictate that our budgets be balanced, constantly monitored, and responsive to changes in service demands. With these concepts in mind, the Town of Sudbury has adopted the following budget policy statements:

- On or before December 20 of each year, the Town Manager will submit to the Board of Selectmen and Finance Committee a proposed budget plan for Town Operating Departments.
- On or before December 20 of each year, the Sudbury Public School Committee will submit to the Board of Selectmen and Finance Committee a proposed budget plan for the Sudbury Public Schools.

- On or before December 20 of each year, the Lincoln-Sudbury Regional High School Committee will submit to the Board of Selectmen and Finance Committee a proposed budget plan for the Lincoln-Sudbury Regional High School.
- On or before December 20 of each year, the Minuteman Regional Vocational-Technical High School Committee will submit to the Board of Selectmen and Finance Committee a proposed budget plan for the Minuteman Regional Vocational-Technical High School.
- On or before December 31 of each year, the Town Manager will prepare a comprehensive budget for the Town of Sudbury, covering all major cost centers, all spending plans and all anticipated revenues. This comprehensive budget will be submitted to the Finance Committee and to the Board of Selectmen.
- The annual operating budgets will be appropriated on a balanced basis, where operating revenues (estimated revenues) are used to fund operating expenditures/expenses (appropriations).
  - Operating revenues include property taxes, motor vehicle excises, charges for services, interest earnings, license and permit fees, fines and forfeitures, regularly recurring governmental aid, and transfers in from other funds established for operating purposes.
  - Operating expenditures/expenses include salaries and wages, employee benefits, equipment and improvements, depreciation (proprietary funds only), materials, supplies, and contractual costs. The Town of Sudbury traditionally votes to issue all debt exempt for the limits of Proposition of 2 ½, and thus debt service is not considered an operating expenditure.
- Nothing in this policy shall prohibit the use of operating revenues for capital expenditures/expenses
- The Town will avoid relying on Free Cash to fund on-going operating expenses.
- To the extent possible, one-time revenues that are not required by law or agreement to be expended for a particular purpose will only be used for capital purposes, augmenting of Town reserves or emergency expenditures/expense.
- The Town Manager will annually estimate the costs of the Town's obligations for providing benefits for Town and Sudbury Public School employees as part of the preparation of the annual operating budget.
- The operating budget will not be subsidized by the Stabilization Fund.

### **Revenue Policy**

Revenues determine the capacity of the Town to provide services. To ensure that revenues for the Town are balanced and capable of supporting desired levels of services, the Town of Sudbury has adopted the following revenue policy statements:

- The Town Manager and Finance Director are responsible for estimating revenues for the upcoming fiscal year. They will consult with other officials of the town as well as state officials and others with knowledge of state and local finance.
- Revenue forecasts for local receipts and state aid shall be conservative, using generally accepted forecasting techniques and appropriate data. Revenue deficits will be avoided at all costs. To avoid any potential for such a deficit, estimates for local receipts will generally not exceed 100% of the prior year's actual collections.
- The Town Manager and Finance Director will project revenues for the next three years as part of the three year financial forecast.

- Each year and whenever appropriate, existing revenues will be re-examined and possible new sources of revenues will be explored to ensure that we are maximizing our revenue potential.
- Legally restricted revenues will be avoided when they adversely affect the short or long-term financial health of our government.
- The Town will strive to be informed and aware of all grants and other aid that may be available to us. All potential grants and other aid shall be carefully examined for matching requirements (both dollar and level-of-effort) and restrictive covenants, to ensure that our participation in such grants will be beneficial and cost-effective.
- Each year and whenever appropriate, intergovernmental revenues will be reviewed to determine their short and long-term stability, to minimize the impact of any adverse changes. Intergovernmental revenues shall be used as legally prescribed or otherwise set forth by policy.
- A balance will be sought in the revenue structure between elastic and inelastic revenues, to minimize any adverse effects caused by inflationary or economic changes.
- One-time revenues will be used for capital improvements, additions to reserves or as legally restricted to a specific purpose.
- The Town will carefully and routinely monitor all amounts due the Town. An aggressive policy of collection will be followed for all receivables, including property taxes. A target of 98% property tax collection rate by fiscal year end will be achieved.
- Recreational user charges and fees will be set to recover approximately 100% of total direct costs generated by revolving fund recreation programs.
- Enterprise fund (Solid Waste and Atkinson Pool) user charges and fees will be set to recover all direct and associated with the activities of these funds as well as the indirect costs for the Solid Waste Enterprise Fund.

### **Expenditure/Expense Policy**

Expenditure/expenses are a rough measure of a local government's service output. While many expenditures/expenses can be easily controlled, emergencies, unfunded mandates, and unanticipated service demands may strain our ability to maintain a balanced budget. To ensure the proper control of expenditures/expenses and provide for a quick and effective response to adverse financial situations, the Town of Sudbury has adopted the following expenditure/expense policy statements:

- Expenditures/expenses and purchase commitments will be made in a form and process that is legal, appropriate, funded, authorized and sufficiently documented.
- Expenditures/expenses and purchase commitments will be recorded in an accurate and timely fashion.
- The review and approval process for all vouchers shall be followed at all times. Properly completed claims must be prepared and submitted to the accounting department by the department responsible for originating the claim. A "properly completed claim" must include, but is not limited to, the vendor's name and address, date of claim, explanation, and accounts to be charged, department authorization signature and sufficient documentation. "Sufficient documentation" means that a person unfamiliar with the transaction could understand what was ordered, when, by whom, from what vendor, at what price, when the goods or services were delivered, who accepted delivery, and who authorized payment.

- The balances in appropriation accounts will be monitored regularly to ensure that the total of expenditures/expenses and purchase commitments in any account do not exceed the authorized budget for that account.
- Requests for competitive bids, proposals, formal and informal quotes, and other methods of seeking and encouraging vendor competition will be obtained as required by law and as otherwise established by the Town Manager or Town Counsel.
- Arrangements will be encouraged with other governments, private individuals, and firms, to contract out or cooperatively deliver services, in a manner that reduces cost and/or improves efficiency and effectiveness while maintaining service quality.
- The full direct and indirect costs will be calculated for any service provided for a fee or charge, or where there is a potential for the reimbursement of such costs.
- All appropriations shall lapse at the close of the fiscal year to the extent that they shall not have been expended or encumbered.

### **Reserves and Risk Management Policy**

A municipality's fiscal policies should include a plan for maintaining reserves. Operating reserves (or fund balance) are a prudent fiscal management tool and an important credit factor in the analysis of financial flexibility. The Town of Sudbury will maintain a level of reserves that protect the Town from emergency conditions that require financial flexibility, contribute to sufficient liquidity to pay all Town expenses without short-term borrowing, and contribute to the high credit rating that the Town currently holds from Standard & Poor's (AAA). To provide for adequate levels of reserves to protect the Town's financial condition over the long-term, the Town of Sudbury has adopted the following financial reserves policy statements.

#### **A. Risk Management**

- The Town will maintain an effective risk management program that provides adequate coverage, minimizes losses, and reduces costs.
- The Town will annually work with the Town's insurance carrier to update all listings of Town owned assets and the value of such covered assets.
- As the Town is self-insured for several of the benefits programs it offers, the Town will maintain adequate reserves for its Workers Compensation, Unemployment Compensation, and Health Insurance Programs, as follows:
  - Workers Compensation Fund, at the beginning of each fiscal year, at least 110 % of the average annual claims for the prior three years
  - For the Unemployment Compensation Fund, at the beginning of each fiscal year, at least 110% of the average annual claims for the prior three years
  - For the Health Insurance Fund, at the beginning of each fiscal year, at least 150% of the estimated run-out claims for each insurance plan that is self-insured.

#### **B. Stabilization Fund**

- The Town of Sudbury shall maintain a Stabilization Fund to provide the reserves that are required to protect the financial condition of the Town.
- The Town will work toward the goal of maintaining in the Stabilization Fund an amount equal to five percent (5%) of the total projected general fund operating revenues for the next previous fiscal year.
- Interest earned on Stabilization Fund balances will be retained in the Stabilization Fund.

- Withdrawals from the Stabilization Fund will only be used for sudden and unexpected events such as a loss of a revenue source after Annual Town Meeting has approved the operating budget for the next fiscal year. Withdrawals from the Stabilization Fund will only be made by a two-thirds vote of Town Meeting, only if the balances exceed the 5% target and will not draw the balance below that point.

### **Capital Budgeting and Planning Policy**

Capital assets include land, improvements to land, buildings, building improvements, vehicles, machinery, equipment, works of art and historical treasures, infrastructure, construction in progress and all other tangible and intangible assets that are used in operations and have initial useful lives extending beyond a single reporting period. Infrastructure assets are long-lived capital assets that normally are stationary in nature and can be preserved for a significantly greater number of years than most capital assets. Examples of infrastructure assets owned by the Town of Sudbury include roads, bridges, tunnels, dams and drainage systems.

The Town of Sudbury has a capital planning and budget bylaw and process that require the following:

- On or before November 15 of each year, the Town Manager will submit a capital program to the Capital Improvement Planning Committee. The proposed program will detail each capital project, the estimated cost, description and funding source.
- The Town will update and readopt annually a five-year capital improvement plan ("CIP"), including the upcoming annual capital improvement budget ("CIB") and a four year projection of capital needs and expenditures which details the estimated cost, description and anticipated funding sources for capital projects.
- The first year of the five year CIP will be the basis of formal fiscal year appropriation request during the annual budget process.
- Per the Town's capital bylaw, the Capital Improvement Budget and Plan will generally address those capital assets with a value of more than \$10,000 and a useful life of over five (5) years.
- The Town will emphasize preventive maintenance as a cost-effective approach to infrastructure maintenance. Exhausted capital goods will be replaced as necessary.
- The capital improvements plan should be tied to the Town's master facilities study to ensure that the capital items requested meet the future growth needs for the Town.

### **Debt Management Policy**

Debt is an effective way to finance capital improvements or to even out short-term revenue flows. Properly managed debt preserves our credit rating, provides flexibility in current and future operating budgets, and provides us with long-term assets that maintain or improve our quality of life. To provide for the appropriate issuance and responsible use of debt, the Board of Selectmen of the Town of Sudbury have adopted the following debt management policies.

- Long-term debt will be issued only for objects or purposes authorized by state law under Chapter 44, section 7 and 8.
- Short-term debt may be issued to finance current operating expenditures only in the event of extreme financial emergency.
- Debt maturity will not exceed the lesser of: the useful life (as established by the Town Treasurer-Collector), or the period of probable usefulness (as defined in Massachusetts State Local Finance Law), of the object or purpose so financed, whichever is shorter.



- Debt limits established by law and policy will be calculated by the Town's Finance Director and Treasurer-Collector at least once each year and whenever otherwise requested or appropriate.
- The Town will maintain good communications with bond rating agencies, bond counsel, banks, financial advisors and others involved in debt issuance and management.
- The Town's annual Town Report, Town Manager's Budget Request and annual town meeting warrant will give comprehensive summaries of the debt obligations of the Town.
- The Town will attempt to maintain a long-term debt schedule so that at least 50 percent of outstanding principal will be paid within ten years.
- The Town will attempt to vote all significant debt questions (over \$500,000) exempt from the limits of Proposition 2 1/2.

### **Protection of Credit Rating Policy**

Maintenance of the highest level credit rating possible is important to the continued financial health of Sudbury as it reduces the costs of issuing debt. Credit rating firms consider management practices to be very important factors. There are several management practices that can inadvertently jeopardize the financial health of a local government. To be proactive in assuring the Town of Sudbury does not engage in these practices, the Board of Selectmen of the Town of Sudbury has adopted the following credit rating protection policies.

- The Town will not rely on reserves to sustain operating deficits. Use of such reserves will be limited to helping the Town deal with short-term or emerging financial stress, but then the Town will either reduce spending to within the limits of recurring revenues, or seek approval for additional revenues from the voters of the Town.
- The Town will not defer current costs to a future date. This includes costs such as pension costs or benefits costs. From time to time the State offers municipalities the option of deferring payments to their pension system, or other costs, as a short term way of balancing a fiscal year's budget. However, it the intention of the Town of Sudbury not to rely on these options.
- The Town will analyze the full-life costs of multi-year decisions. For example, acquiring or construction of new buildings will be conducted with an assessment of the operating costs of the building. Lease agreements will be conducted with an assessment of future budgets and the ability to make annual payments. Labor agreements will be negotiated with an analysis of the full costs associated with the terms of the agreement.

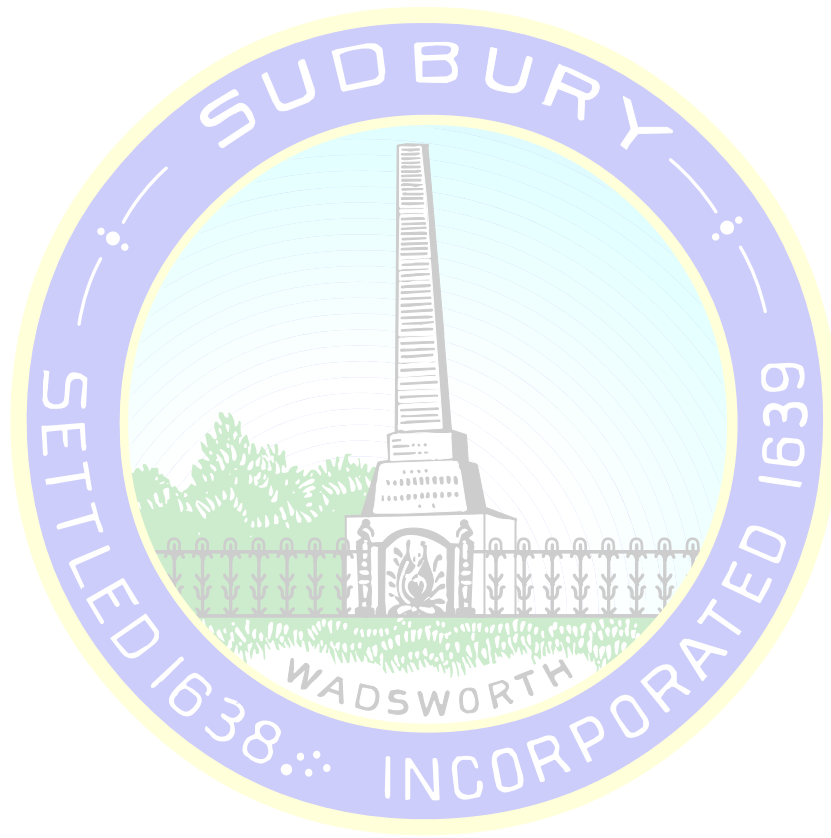
The Town will follow the policies as outlined in this policy statement.

## Appropriation and Budget Amendment Procedures

Town Meeting has the sole authority to appropriate funds for the operating budget and the capital budget, as well as for other money articles, and the vote of Town Meeting become the legal authorization to implement the budget. By Sudbury bylaw, the Annual Town Meeting begins on the first Monday in April. Prior to the first session of Annual Town Meeting, the Town Warrant, containing the proposed budget articles, is sent to every household in Town. The Operating Budget Article is moved by the Finance Committee. The Capital Budget Article is moved by the Capital Improvement Planning Committee. After appropriation by Town Meeting, and following the adjournment of Town Meeting budgets can only be amended the following April at the next year's Annual Town Meeting under a Budget Adjustment Article or through a Special Town Meeting. Sudbury only occasionally has needed to amend the operating budget.

# Section Three

## FY08 BUDGET OVERVIEW



## A Reader's Guide to the Budget

In this section of the budget document, tables, charts, and narratives are provided that provide context for the important budget deliberations and decisions that are ahead of the Town. The budget of a municipality has many parts to it. Different cost centers operate under different state laws. They have their own leadership and management structure. Each has revenue sources that are dedicated to specific programs and are not transferable to other parts of the budget. Each has mandated activities and services that can not be discontinued. Each has employees working under collective bargaining agreements, and the provisions and requirements for each group differ from others. And in two cases – the Lincoln-Sudbury Regional High School and the Minuteman Vocational Technical High School – other towns have a role and a say in the budget requests and spending priorities of the cost center. Readers hoping for a budget that is similar to that of a private company will be disappointed. It takes a great deal of effort to gain an understanding of the milieu in which the Town of Sudbury's budget and financing plan is put together.

A municipal budget document can be a challenge to read and understand, especially for those who don't deal with them often. This is true for a number of reasons: first, they involve numbers, often in lengthy tables. Second, a municipal government is responsible for a large and diverse set of operations and services, many of them complex in nature, so even at a summary level there is still a great deal of detail to digest. And lastly, budget documents must serve a number of purposes.

- A Planning Tool. A budget should be a blueprint for the services that the Town will offer in the fiscal year, consistent with the values and goals that have been set by the Board of Selectmen.
- A Communication Tool. Within the budget pages, the reader should be able to find out how the resources of the Town have been allocated. And, if performance data is included, they are a report of how the Town has been using the resources to achieve the mission and goals of the organization.
- Link to Town Meeting Warrant. A budget's layout should be consistent with the Town Warrant, which is organized according to the Town's organizational chart and chain of command. So, for example, funds appropriated within the Town's Public Safety cluster can only be expended for a public safety purpose with the approval of the Town Manager.
- Link to Different Funds. Governmental accounting is fund accounting, unlike private sector accounting, where there is usually only one fund for all the financial transactions of the entity. In the Town of Sudbury, there is the General Fund and two enterprise funds that support the annual budget. The Community Preservation Fund does not support the General Fund, but rather eligible one-time projects that meet State determined criteria.

To help the reader navigate this budget document, below is an explanation of different parts of the budget document that may be helpful in interpreting and understanding the actual budget requests.

- Appendix One in the back is a ***Glossary of Budget Terms and Definitions***. For the first time reader especially, it may be helpful to be able to check on the meaning of unfamiliar terms that are contained in this document.
- The second section of this document, ***Budget Calendars, Procedures and Policies*** describes how the budget is developed according to various instructions and stages of development.
  - o FY08 Budget Instructions from the Finance Committee
  - o Overview of Phases of Budget Development

- FY08 Budget Calendar
  - Board of Selectmen's Budget and Financial Management Policies
  - Budget Appropriation and Amendment Procedures
- The third section of this document, titled **FY08 Budget Overview** contains the FY08 Budget Request Summary Table. Table 1 shows two levels of budget growth for each of the four major cost centers: one that requires only 3% more funding for non benefit costs than the FY07 enacted budget; the other the budget request that has been voted /recommended by each cost center. This summary shows that if each of the four major cost centers budgets were funded at the amounts they were voted/recommended the Town would be facing a \$3.5 million gap between available resources and these requests. If the "3%" budget requested by the Finance Committee were funded instead, the total of these budgets would still exceed available resources but the gap is about \$866,000. Table 2 shows the same bottom line, but reorganizes the format so that the four cost center budgets are grouped together to show the total increase in these operating accounts separate from the enterprise, debt and charges accounts. The amounts for these latter accounts stay the same across all budget presentations, and any changes to them do not affect the bottom line of balancing the budget within the levy.
- The third section of this document also presents **Backdrop for FY08 Budget Discussions**. This is context information for readers who want to understand better the critical factors that affect the Town's financial condition and the development of the FY08 Budget.
- Expenditure Pressures FY08. This focuses on the major factors that are impacting on the cost of providing services.
  - Revenue Situation. Annually, the Town updates an analysis of its financial condition through use of indicators that have been trended over time, following the analysis model developed by the International City/County Management Association.<sup>1</sup> Here, we incorporate those indicators that focus on the revenues the Town relies on.
  - Revenue Projections for FY08. This is a quick summary of the projected revenues supporting the FY08 Recommended Budget.
  - Revenues and Fund Accounting This section contains detailed background information about the revenue sources the Town relies on. Each revenue type is defined, the projection for FY08 is given, and the assumptions that support that projection are given.
- Detailed operational budget requests for FY08 are found in sections 4 through 7. Here can be found the explanation of what services are being provided, the level of staffing involved, and other such information related to each budget request. Readers may use this information to dig deeper into the specific budget requests. Note that the three school systems develop separate detailed budget documents that are not included in this budget. Only summary level information is presented here for these school systems.
- Section 8 has the **FY08 Operating Capital Budget**, the long range capital plans, and the **FY08 Debt Budget**.
- Section 9 contains a number of appendices to this budget document. These appendices are intended to be supplemental reference materials as they did not specifically affect the development of the FY08 budget, but provide more historical and longer term information for the interested reader.
- |        |   |
|--------|---|
| One:   | Budget Terms and Definitions                              |
| Two:   | History of Proposition 2 ½ Overrides in Sudbury           |
| Three: | Residential Tax Rate History, 1990 - 2007                 |
| Four   | Population History of Sudbury, 1790 - 2006                |
| Five   | The Town's Energy Management Program                      |
| Six    | C.A.R.E. Program (Cost Avoidance and Revenue Enhancement) |

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<sup>1</sup> Groves and Valente **Evaluating Financial Condition**, International City/County Management Association, Washington D.C., 1994

- Seven: FY06 Audit, Management's Discussion & Analysis (not completed as of December 29, 2006 printing of this document).
- Eight: Background information on the Middlesex Retirement System

## FY08 Budget Request Summary

This section contains an overall picture of the FY08 budget requests in one summary table so that the reader can see on one page the total presentation of these requests. There are two versions of the standard summary table of annual budget requests. Table 1 shows two levels of budget for each of the four major cost centers: one that requires only 3% more funding than the FY07 enacted budget, and the budget request that is voted/recommended by each cost center. This summary shows that if each of the four major cost centers budgets were funded as voted, the Town would be facing a \$3.6 million gap between available resources and these requests. If the "3%" budgets submitted by the Town, SPS and L-S were funded at that level, the total would still exceed available resources but the gap is about \$925,215. Table 2 shows the same bottom line, but reorganizes the format so that the four cost center budgets are grouped together to show the total increase in these operating accounts separate from the enterprise, debt and charges accounts. The amounts for these accounts stay the same across all budget presentations, and any changes to them do not affect the bottom line of balancing the budget within the levy.

For each of the school systems, plus the Town, the 3% budget scenario would mean a reduction in staffing from FY07 levels. Information on the specific impacts on Sudbury Public Schools and Lincoln-Sudbury Regional High School should be sought in their budget documents. For the Town, the individual departmental budgets show a 3% increase budget so the reader can get a better idea of how the reductions would affect the specific departments. However, the total of the cuts do not reduce the Town to 3%, but rather to 3.4%. If necessary, these further reductions can be taken later, but showing them now would require identifying positions to be reduced. Benefits for each cost center are increasing by 12 to 15%, so when those costs are added in, the overall budget increase under the **FinCom Requested 3% Budget** is 5.33% or \$3.4 million dollars over the FY07 appropriated levels for these cost centers.

The level of budget support in the Voted/Requested Budget represents the level of funding the Sudbury Public Schools, Lincoln-Sudbury Regional High School, the Town of Sudbury and the Capital Improvement Planning Committee have submitted as what is appropriate and sufficient to provide the level and quality of services they believe best, given the Town's financial condition. Including the cost of benefits, the overall budget increase under the **Voted/Requested Budget** is 9.6% or \$6.0 million dollars over the FY07 appropriated levels for these cost centers.

The budget requests for the costs of benefits, such as medical insurance, pension contributions, Medicare, unemployment insurance, etc. are budgeted at actual projected costs for all budget scenarios. Town and school officials have found that even when there is reason to believe that positions might be reduced, any anticipated savings in health insurance are offset by the cost of unemployment claims the Town and school would incur. If there are a large number of layoffs, those unemployment claims can exceed the savings from health insurance, and each cost center needs to carefully plan for its own unemployment costs if that becomes necessary.

The Finance Committee did not require any other budget requests be prepared for FY08 consideration, but the Town has developed a "Level Services" Budget request found in Section Four of this document, and the schools have also provided some information about alternative funding level impacts. Readers should consult the document submitted by those two entities.

**Table 1: Summary of FY08 Budget Requests (Standard Format)**

<i>STANDARD FORMAT</i>							
<b>EXPENDITURES</b>	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>3% Budget FY08</b>	<b>% V. FY07</b>	<b>Voted/ Requested FY08</b>	<b>Dollars V. FY07</b>	<b>% V. FY07</b>
LS Gross Assessment	17,188,211	18,479,238	19,229,814		20,127,121		
LS Operating Offsets	(2,596,198)	(3,378,145)	(3,234,779)		(3,234,779)		
<b>LSRHS NET (Operating Assessment)</b>	<b>14,592,013</b>	<b>15,101,093</b>	<b>15,995,035</b>	<b>5.92%</b>	<b>16,892,342</b>	<b>1,791,249</b>	<b>11.86%</b>
SPS less offsets	24,058,431	25,392,734	26,154,479		27,496,526		
SPS Employee Benefits	5,107,457	5,651,772	6,353,855		6,353,855		
<b>SPS NET</b>	<b>29,165,888</b>	<b>31,044,506</b>	<b>32,508,334</b>	<b>4.72%</b>	<b>33,850,381</b>	<b>2,805,875</b>	<b>9.04%</b>
Minuteman Regional Assessment	304,640	312,280	324,771		324,771		
Other Regional School Assessments	-	63,854	66,408		66,408		
<b>Total: Schools</b>	<b>44,062,541</b>	<b>46,521,733</b>	<b>48,894,548</b>	<b>5.10%</b>	<b>51,133,902</b>	<b>4,612,169</b>	<b>9.91%</b>
General Government	2,011,226	2,091,735	2,152,403		2,281,312		
Public Safety	5,733,642	6,091,379	6,206,229		6,286,907		
Public Works	2,883,083	3,068,845	3,283,009		3,391,953		
Human Services	537,382	558,369	575,240		596,513		
Culture & Recreation	994,242	1,027,672	1,058,647		1,167,321		
Unclassified & Transfer Accounts	313,345	421,819	451,274		452,274		
subtotal, town services	<b>12,472,920</b>	<b>13,259,819</b>	<b>13,726,802</b>		<b>14,176,280</b>		
Town Employee Benefits	3,124,307	3,557,700	4,011,678		4,011,678		
<b>Total: Town Departments</b>	<b>15,597,227</b>	<b>16,817,519</b>	<b>17,738,480</b>	<b>5.48%</b>	<b>18,187,958</b>	<b>1,370,439</b>	<b>8.15%</b>
Town Debt Service	5,601,022	5,502,208	4,481,929		4,481,929		
LSRHS (Debt Assessment)	2,461,086	2,935,689	2,647,937		2,647,937		
<b>Total: Operating Budget</b>	<b>67,721,876</b>	<b>71,777,149</b>	<b>73,762,894</b>	<b>2.77%</b>	<b>76,451,727</b>	<b>4,674,577</b>	<b>6.51%</b>
Transfer Station Enterprise	399,843	267,803	271,574		271,574		
Pool Enterprise	426,212	436,713	457,842		457,842		
Capital Planning Committee	273,000	285,095	384,148		384,148		
Capital Exclusion-Fire Truck			(405,000)		(405,000)		
Capital Articles-Fire Truck	150,000	-	405,000		405,000		
Articles in operating	-	-	-		-		
Stabilization Fund	-	-	-		-		
<b>Total: Other</b>	<b>1,249,055</b>	<b>989,611</b>	<b>1,113,564</b>	<b>12.53%</b>	<b>1,113,564</b>	<b>123,953</b>	<b>12.53%</b>
Charges	1,181,308	1,100,200	777,420		777,420		
<b>Total: To Be Raised</b>	<b>70,152,239</b>	<b>73,866,960</b>	<b>75,653,879</b>	<b>2.42%</b>	<b>78,342,711</b>	<b>4,475,751</b>	<b>6.06%</b>
	-	-	-		-		
<b>RECEIPTS</b>							
State Aid	5,456,696	5,863,671	5,624,783		5,624,783		
Local Receipts	3,955,092	4,671,559	4,842,552		4,842,552		
Grants	-	30,000	23,266		23,266		
Free Cash	800,000	1,475,243	1,900,000		1,900,000		
Retirement Trust Fund	25,000	25,000	25,000		25,000		
Abatement Surplus	543,450	511,119	450,000		450,000		
Prior Year Articles	23,000	-	-		-		
Ambulance Fund	210,189	230,342	230,342		230,342		
Enterprise Funds	844,848	728,516	760,328		760,328		
<b>Total: Receipts</b>	<b>11,858,275</b>	<b>13,535,450</b>	<b>13,856,271</b>	<b>2.37%</b>	<b>13,856,271</b>	<b>320,821</b>	<b>2.37%</b>
<b>REQUIRED TAX LEVY</b>	<b>58,293,964</b>	<b>60,331,510</b>	<b>61,797,608</b>		<b>64,486,440</b>		
Previous Year Levy + 2 1/2%	46,313,461	51,354,490	53,202,102		53,202,102		
New Growth	738,480	550,000	550,000		550,000		
Prop 2 1/2 Override (Operating)	3,050,000	-	-		-		
<b>LEVY LIMIT</b>	<b>50,101,941</b>	<b>51,904,490</b>	<b>53,752,102</b>		<b>53,752,102</b>	<b>1,847,612</b>	<b>3.56%</b>
Unused Levy Capacity	-	-	-		-		
Prop 2 1/2 Debt Exemptions	5,234,224	5,610,948	4,304,085		4,304,085	(1,306,863)	-23.29%
Prop 2 1/2 Capital Exclusions	150,000	-	-		-		
<b>APPLICABLE LEVY LIMIT</b>	<b>55,486,165</b>	<b>57,515,438</b>	<b>58,056,187</b>		<b>58,056,187</b>		
Cherry Sheet Grants for School Debt	2,816,206	2,816,206	2,816,206		2,816,206		
<b>TOTAL: REVENUE</b>	<b>70,160,646</b>	<b>73,867,094</b>	<b>74,728,664</b>	<b>1.17%</b>	<b>74,728,664</b>	<b>861,570</b>	<b>1.17%</b>
<b>UNDER/ (OVER) LEVY LIMIT</b>	<b>8,407</b>	<b>134</b>	<b>(925,215)</b>		<b>(3,614,047)</b>	<b>(3,614,181)</b>	



**Table 2: Summary of FY08 Budget Requests (Restated Format)**

<i>RESTATED FORMAT</i>							
<b>EXPENDITURES</b>	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>3% Budget FY08</b>	<b>% V. FY07</b>	<b>Voted/ Requested FY08</b>	<b>Dollars V. FY07</b>	<b>% V. FY07</b>
LS Gross Assessment	17,188,211	18,479,238	19,229,814		20,127,121		
LS Operating Offsets	(2,596,198)	(3,378,145)	(3,234,779)		(3,234,779)		
<b>LSRHS NET (Operating Assessment)</b>	<b>14,592,013</b>	<b>15,101,093</b>	<b>15,995,035</b>	<b>5.92%</b>	<b>16,892,342</b>	<b>1,791,249</b>	<b>11.86%</b>
SPS less offsets	24,058,431	25,392,734	26,154,479		27,496,526		
SPS Employee Benefits	5,107,457	5,651,772	6,353,855		6,353,855		
<b>SPS NET</b>	<b>29,165,888</b>	<b>31,044,506</b>	<b>32,508,334</b>	<b>4.72%</b>	<b>33,850,381</b>	<b>2,805,875</b>	<b>9.04%</b>
Minuteman Regional Assessment	304,640	312,280	324,771		324,771		
Other Regional School Assessments	-	63,854	66,408		66,408		
<b>Total: Schools</b>	<b>44,062,541</b>	<b>46,521,733</b>	<b>48,894,548</b>	<b>5.10%</b>	<b>51,133,902</b>	<b>4,612,169</b>	<b>9.91%</b>
General Government	2,011,226	2,091,735	2,152,403		2,281,312		
Public Safety	5,733,642	6,091,379	6,206,229		6,286,907		
Public Works	2,883,083	3,068,845	3,283,009		3,391,953		
Human Services	537,382	558,369	575,240		596,513		
Culture & Recreation	994,242	1,027,672	1,058,647		1,167,321		
Unclassified & Transfer Accounts	313,345	421,819	451,274		452,274		
subtotal, town services	<b>12,472,920</b>	<b>13,259,819</b>	<b>13,726,802</b>		<b>14,176,280</b>		
Town Employee Benefits	3,124,307	3,557,700	4,011,678		4,011,678		
<b>Total: Town Departments</b>	<b>15,597,227</b>	<b>16,817,519</b>	<b>17,738,480</b>	<b>5.48%</b>	<b>18,187,958</b>	<b>1,370,439</b>	<b>8.15%</b>
Capital Planning Committee	273,000	285,095	384,148		384,148		
Capital Exclusion-Fire Truck			(405,000)		(405,000)		
Capital Articles-Fire Truck	150,000	-	405,000		405,000		
<b>Total: Capital Budget</b>	<b>423,000</b>	<b>285,095</b>	<b>384,148</b>	<b>34.74%</b>	<b>384,148</b>	<b>99,053</b>	<b>34.74%</b>
<b>Subtotal: Operating Budget</b>	<b>60,082,768</b>	<b>63,624,347</b>	<b>67,017,176</b>	<b>5.33%</b>	<b>69,706,008</b>	<b>6,081,661</b>	<b>9.56%</b>
Town Debt Service	5,601,022	5,502,208	4,481,929		4,481,929		
LSRHS (Debt Assessment)	2,461,086	2,935,689	2,647,937		2,647,937		
<b>Total: Debt Budget</b>	<b>8,062,108</b>	<b>8,437,897</b>	<b>7,129,866</b>	<b>-15.50%</b>	<b>7,129,866</b>	<b>(1,308,031)</b>	<b>-15.50%</b>
Transfer Station Enterprise	399,843	267,803	271,574		271,574		
Pool Enterprise	426,212	436,713	457,842		457,842		
Articles in operating	-	-	-		-		
Stabilization Fund	-	-	-		-		
<b>Total: Other</b>	<b>826,055</b>	<b>704,516</b>	<b>729,416</b>	<b>3.53%</b>	<b>729,416</b>	<b>24,900</b>	<b>3.53%</b>
Charges	1,181,308	1,100,200	777,420		777,420		
<b>Total: To Be Raised</b>	<b>70,152,239</b>	<b>73,866,960</b>	<b>75,653,879</b>	<b>2.42%</b>	<b>78,342,711</b>	<b>4,475,751</b>	<b>6.06%</b>
<b>RECEIPTS</b>							
State Aid	5,456,696	5,863,671	5,624,783		5,624,783		
Local Receipts	3,955,092	4,671,559	4,842,552		4,842,552		
Grants	-	30,000	23,266		23,266		
Free Cash	800,000	1,475,243	1,900,000		1,900,000		
Retirement Trust Fund	25,000	25,000	25,000		25,000		
Abatement Surplus	543,450	511,119	450,000		450,000		
Prior Year Articles	23,000	-	-		-		
Ambulance Fund	210,189	230,342	230,342		230,342		
Enterprise Funds	844,848	728,516	760,328		760,328		
<b>Total: Receipts</b>	<b>11,858,275</b>	<b>13,535,450</b>	<b>13,856,271</b>	<b>2.37%</b>	<b>13,856,271</b>	<b>320,821</b>	<b>2.37%</b>
<b>REQUIRED TAX LEVY</b>	<b>58,293,964</b>	<b>60,331,510</b>	<b>61,797,608</b>		<b>64,486,440</b>		
Previous Year Levy + 2 1/2%	46,313,461	51,354,490	53,202,102		53,202,102		
New Growth	738,480	550,000	550,000		550,000		
Prop 2 1/2 Override (Operating)	3,050,000	-	-		-		
<b>LEVY LIMIT</b>	<b>50,101,941</b>	<b>51,904,490</b>	<b>53,752,102</b>		<b>53,752,102</b>	<b>1,847,612</b>	<b>3.56%</b>
Unused Levy Capacity	-	-	-		-		
Prop 2 1/2 Debt Exemptions	5,234,224	5,610,948	4,304,085		4,304,085	(1,306,863)	-23.29%
Prop 2 1/2 Capital Exclusions	150,000	-	-		-		
<b>APPLICABLE LEVY LIMIT</b>	<b>55,486,165</b>	<b>57,515,438</b>	<b>58,056,187</b>		<b>58,056,187</b>		
Cherry Sheet Grants for School Debt	2,816,206	2,816,206	2,816,206		2,816,206		
<b>TOTAL: REVENUE</b>	<b>70,160,646</b>	<b>73,867,094</b>	<b>74,728,664</b>	<b>1.17%</b>	<b>74,728,664</b>	<b>861,570</b>	<b>1.17%</b>
<b>UNDER/ (OVER) LEVY LIMIT</b>	<b>8,407</b>	<b>134</b>	<b>(925,215)</b>		<b>(3,614,047)</b>	<b>(3,614,181)</b>	

## Backdrop for FY08 Budget Discussions

### Expenditure Pressures

There are six primary “budget busters” that have been driving high rates of spending growth: health insurance, pension costs, wages & salaries for employees, debt service, energy costs and a rapid growth in population, particularly of school age children.

Health Insurance Costs The Town/SPS provides health insurance for both active employees and retirees, as does LSRHS. State statute and case law provide strict guidelines for public employers in Massachusetts as to what benefits must be offered and how changes in such plans can be achieved. Changes in health insurance plans for the Town/SPS are subject to collective bargaining between the unions and the Town/School Committee and generally must be agreed to by all bargaining units before any changes can be implemented. Rates are voted on annually by the Board of Selectmen following recommendations from the Town Manager and Assistant Town Manager. As the Town/SPS is self-insured for health insurance, it is a complicated and time-consuming process each year to determine the amount that will need to be appropriated to both cover all claims and contribute the required employer match to the employees’ contribution. The Assistant Town Manager is responsible for this program, and he works closely with a specialized consulting firm, with representatives of our group health insurance plan providers and with the Employee Insurance Advisory Committee (representing all employee groups) each year to review the trends in medical costs, level of claims activities by our employees and retirees, and amounts of catastrophic reinsurance the Town should purchase. To confirm that the health insurance programs offered by the Town are still the most cost effective approach, the Assistant Town Manager also receives data on the cost of offering our health insurance on a premium basis. And he tracks the costs experienced by other towns and regional purchasing group, such as the one that LSRHS belongs to. The Town has saved significant dollars by continuing to offer our health insurance on a stand alone, self-insured basis.

Budgeted Health Insurance Costs	2003	2004	2005	2006	2007	2008	Pct Change, FY03-FY08
Town	1,323,840	1,472,500	1,601,209	1,793,350	2,008,552	2,249,578	70%
SPS	2,813,160	3,282,900	3,563,980	3,991,650	4,470,648	5,007,126	78%
L-S (total for LS, not prorated)	1,532,437	1,716,532	1,879,908	2,040,545	2,383,402	see note	
<b>Total</b>	<b>5,669,437</b>	<b>6,471,932</b>	<b>7,045,097</b>	<b>7,825,545</b>	<b>8,862,602</b>		
Percent change		14.15%	8.86%	11.08%	13.25%		

NOTE: L-S budget detail not received in time to complete chart with FY08 numbers

As shown in the table above, the rate of increase in the costs of providing health insurance for employees and retirees of the Town, SPS and LSRHS continues to increase at a double digit rate and consumes ever growing percentage of new revenues each year. This is true for all three cost centers, even though the contribution rates for Town/SPS employees is lower for the HMO health insurance plan (90% employer/10% employee split) offered by the Town than the similar product offered by L-S, which has a contribution rate of 75/25. The escalation in health insurance costs is due to forces in the Massachusetts and national economy and is beyond the Town of Sudbury’s power to control. (Note: The Town and L-S PPO product both have a contribution split of 75/25. Also, the Town/SPS have a 50/50 split for the cost of retirees’ health insurance products; L-S has a 75/25 split for retirees).

Pension Costs The Town of Sudbury, the Sudbury Public Schools and L-S are required to contribute to the Middlesex Retirement System (MRS) on behalf of all Town and school employees who work at least 20 hours per week EXCEPT for teachers. (Teachers are covered by and contribute to the Massachusetts Teachers Retirement System, but the state pays the employer portion of their current and future pension liability). These costs too have risen at a rapid rate.

Budgeted Pension Costs	2004	2005	2006	2007	2008	Pct Change, FY04-FY08
Town	1,095,891	1,103,241	1,151,911	1,345,545	1,539,276	40%
SPS	584,916	676,945	706,110	775,392	865,843	48%
L-S (total for LS, not prorated)	331,030	367,299	393,274	447,450	see note	
Total	2,011,837	2,147,485	2,251,295	2,568,387		
Percent change	21.45%	6.74%	4.83%	14.08%		

NOTE: L-S budget detail not received in time to complete chart with FY08 numbers

There are two particularly noteworthy aspects regarding the membership of the Town and L-S (as well as the Sudbury Water District and the Sudbury Housing Authority) in this regional retirement system.

**The Troubled Middlesex Retirement System** Assessments assigned by the MRS have increased significantly in recent years. In the fall of 2002 the MRS notified Sudbury and other member entities of a planned significant assessment hike for FY04. For Sudbury the increase was 59%, but for some it was even higher. After an outcry from the Boards of Selectmen and Town Managers of member communities, the percentage rate for assessment growth for member towns and districts was reduced by half. Since then a number of actions and investigations have been launched into the actions and performance of the MRS, and why assessments were growing so quickly. Appendix Eight to this budget document includes several items about the management irregularities alleged to have occurred at the MRS, which have been examined by the state's pension oversight board, PERAC, and the State Inspector General's office. In November 2006, the Middlesex Retirement System Board voted to shift control of its nearly \$700 million of assets to the Massachusetts Pension Reserve Investment Management (PRIM) Board.

**Local Retirement Systems versus State Administration** The uncovering of the management practices at the MRS led to questioning by many of the efficacy of locally administered retirement systems, such as the MRS. A recent White Paper by the Pioneer Institute, titled "**Leaving Money on the Table: The 106 Pension Systems of Massachusetts**"<sup>2</sup> analyzed the loss of income statewide due to underperforming local retirement systems and attempted to calculate the amount of money local taxpayers would have to pay to make up for the investment income foregone by not having all pensions dollars invested by the state as part of the Pension Reserve Investment Trust (PRIT), run by PRIM – the Pension Reserve Investment Management Board. The author of this paper concluded that the cost of such local pensions systems was significant. Only six local systems outperformed PRIT's investment record, at a total estimate cost of \$1.6 billion since 1995 – a difference that local taxpayers are required to make up. According to the Pioneer Institute, Middlesex Retirement System, one of the state's 10 worst-performing pension systems, would have had \$158 million more over the last decade by putting its money in the state's top-performing pension system.

All local retirement systems have the option of voluntarily asking PRIT to invest their pension assets. The author notes that PRIT has been very successful at investing the billions of dollars that it manages, earning a compound annual return of 11.19% from 1985 to 2004, outperforming the S & P 500 and the NYSE Composite for the same time period. The author of this paper recommends that all local systems, except those that have outperformed PRIT, place their assets under PRIT management and that the state should expand PERAC's ability to perform more timely audits.

<sup>2</sup> *Leaving Money on the Table: The 106 Pension Systems of Massachusetts* by Ken Ardon, May 2006. See [www.pioneerinstitute.org](http://www.pioneerinstitute.org) for a copy of the white paper

NOTE: While it has been the employers such as the Town of Sudbury that have been asked to offset the decreases in investment earnings in the last few years, employees have always been required to make hefty contributions to their own future retirement. The pension system is a defined benefit plan, with set contributions rates from employees depending on their date of hire: Before Jan 1, 1975: 5% of compensation: Jan 1975 - Dec 1983: 7%: Jan 1984 - June 30, 1996: 8%: After July 1, 1996: 9%. Additionally, all employees who earn over \$30,000 annually are required to pay a 2% surcharge on the amount over that threshold. Thus, some employees are paying 11% on earnings.

Salaries and wages Salaries and wages are the largest component of the operating budgets for all three major cost centers. Since the majority of the employees are organized for collective bargaining purposes, multi-year wage packages are the norm. The table below shows a much small increases in wage costs in FY04 and FY05, but a significant increase in FY06. This increase probably had as much to do with adding employees with the successful override as increases in wage levels.

Budgeted Salary & Wages	2003	2004	2005	2006	2007	Pct Change FY03-FY07
Town	8,102,989	8,280,749	8,437,198	8,801,919	9,116,673	13%
SPS	17,204,114	17,137,047	17,980,472	19,342,996	19,911,333	16%
L-S (total for LS, not prorated)	11,608,407	11,622,720	11,741,237	13,242,727	13,867,111	19%
Total	36,915,510	37,040,516	38,158,907	41,387,642	42,895,117	16%
Percent change		0.34%	3.02%	8.46%	3.64%	

Debt Service Costs The Town has issued debt, pursuant to bond authorization votes of Town Meeting and voters' approval to exclude all such debt from the limits of Proposition 2 1/2. Debt service costs for Town and SPS projects has declined from FY03 to FY08 as the Town faced two debt "peaks". In FY02, the total net exempt debt was \$7.2 million, and then declined for FY03, FY04 and FY05, until the debt service costs for the debt issued for the LS project reached its highest point in FY07.

If approved by Town Meeting and voters, the Town is planning to issue debt for a new police station, which would bring the debt service costs back to the FY07 levels in FY09 before steadily decreasing.

Debt Service Costs	2003	2004	2005	2006	2007	2008
Town Buildings	493,660	1,640,335	989,986	1,128,124	1,005,330	713,774
Land Acquisition	971,545	945,240	919,715	996,747	1,005,065	752,244
SPS Net of SBA	4,989,031	2,193,720	1,276,047	780,842	664,864	190,130
L-S Net of SBA, Sudbury portion	576,388	1,089,609	1,597,382	2,461,086	2,935,689	2,647,937
Net Exempt Debt Budget	7,030,624	5,868,904	4,783,130	5,366,799	5,610,948	4,304,085
Annual percent change		-16.52%	-18.50%	12.20%	4.55%	-23.29%

Energy Costs (Town Budget Only – Analysis does not include SPS or L-S) Energy costs are another item that is growing faster than other parts of the Budget. For FY08 we are projecting

that for Town Buildings only, the costs of paying for electricity, natural gas and heating oil will rise by 9.23%. This follows budgeted increases of 23.4% in FY07.

<b>Budgeted Utility Costs for Town Buildings</b>			
	<b>2006</b>	<b>2007</b>	<b>2008</b>
<b>Building Department</b>	<b>266,790</b>	<b>356,195</b>	<b>394,955</b>
<b>Library</b>	<b>66,080</b>	<b>71,600</b>	<b>71,600</b>
<b>Fire Department</b>	<b>36,665</b>	<b>42,880</b>	<b>52,770</b>
<b>Atkinson Pool</b>	<b>84,000</b>	<b>89,000</b>	<b>92,000</b>
<b>Total</b>	<b>453,535</b>	<b>559,675</b>	<b>611,325</b>
<b>Annual percent change</b>		<b>23.40%</b>	<b>9.23%</b>

Gasoline and diesel fuel costs are also increasing rapidly. For FY08, we project a 23.37% increase in the costs of these fuels. We are also anticipating that we will need reserve fund transfers in FY07 in each of the three departments where these fuels are budgeted, based on the costs we have experienced thus far in FY07, and that in FY06 we needed several reserve fund transfers to augment the \$141,000 that we originally budgeted.

<b>Gasoline/Diesel for Vehicles</b>			
	<b>2006</b>	<b>2007</b>	<b>2008</b>
<b>DPW/All other town vehicles*</b>	<b>191,160</b>	<b>114,104</b>	<b>140,000</b>
<b>Police Department</b>	<b>0</b>	<b>62,140</b>	<b>75,961</b>
<b>Fire Department</b>	<b>0</b>	<b>18,756</b>	<b>24,609</b>
<b>Total</b>	<b>191,160</b>	<b>195,000</b>	<b>240,570</b>
<b>Annual percent change</b>		<b>2.01%</b>	<b>23.37%</b>

\*actual after several reserve fund transfers

Impacts of Population Growth and School Age Children Finally, we must acknowledge the impact of rapid population growth on our budget in recent years. Overall, Town population has risen from 15,510 in 1995 to 17,066 in 2005.<sup>3</sup> Such growth brings demands for more Town services, most acutely felt on our public safety, library, recreation, and human services departments. In most towns, such growth would normally bring about increases in staffing in these areas to keep pace with the population growth. But in Sudbury, that has not occurred, due to the dramatic and challenging growth in the number of children enrolled in the Town's two school systems.

The table which follows uses Department of Education figures for FY05 to illustrate the impact of such growth on Sudbury, especially relative to other communities. FY05 is used as it is the latest year such data is consistently available for each of the towns included. We calculated a blended spending per pupil figure for Sudbury by using spending data for both the Sudbury Public Schools and Sudbury's approximate share for the Lincoln-Sudbury Regional High School. The table shows not only the total number of Sudbury students enrolled in either the Sudbury Public Schools or the Lincoln-Sudbury Regional High School, but also those enrolled in the public schools of a number of other communities, including five of our neighboring towns (Wayland, Hudson, Framingham, Lincoln and Concord), five school systems that are considered to be as high performing as Sudbury's (Lexington, Needham, Wellesley, Weston and Winchester), as well as two Towns smaller than Sudbury (Bedford and Hopkinton) and one much larger than Sudbury (Arlington).

<sup>3</sup> Department of Revenue Population Estimates.

Particular points to note in looking at these data:

1. Sudbury has more students than Wellesley, a town of nearly 10,000 more residents, and nearly as many as Arlington, which has a population that is more than double Sudbury's.
2. If you increased each of these towns' number of school children so that it is 26% of their population, you would see the results presented on the right side of this table. For example, Wayland would have 424 more students and based on Wayland's reported spending per pupil of \$11,599 in FY05, Wayland would need to spend \$5.4 million more dollars to educate these students. Lexington would have had 1,778 more students, and would need to have spent \$21.2 million more in FY05 to educate these additional students. Framingham and Arlington would have spent more than twice what they actually did spend in FY05.
3. Sudbury's blended spending per pupil is the fourth lowest of this group. If Sudbury's spending per pupil was as high as many of the other towns, then Sudbury would have spent significantly more to educate Sudbury students. For example, if the per pupil spending in Sudbury was the same as Bedford's, an additional \$10 million would have been spent by the Sudbury schools in FY05.

### School Age Children as a Percent of Overall Population

	Population DOR Data for 7/1/05	N of Students, DOE Data	School Children as % of Population	Spending Per Pupil, DOE Data*	FY05 Total Educational Spending DOE Data	If N of Students was 26.61% of population	Then Town would have this many more students	And Town would spend this much more on education at own ppe
Sudbury*	17,066	4,542	26.61%	\$ 10,243	\$ 46,523,948			
Hopkinton	14,112	3,435	24.34%	\$ 9,497	\$ 32,621,955	3,756	321	\$ 3,045,678
Wayland	13,002	2,987	22.97%	\$ 11,599	\$ 34,642,051	3,460	474	\$ 5,494,419
Weston	11,581	2,372	20.48%	\$ 14,414	\$ 34,185,304	3,082	710	\$ 10,239,778
Lexington	30,266	6,277	20.74%	\$ 11,929	\$ 74,877,767	8,055	1,778	\$ 21,212,416
Bedford	12,462	2,365	18.97%	\$ 12,662	\$ 29,939,157	3,317	952	\$ 12,055,156
Lincoln*	7,931	1,477	18.62%	\$ 15,442	\$ 22,800,426	2,111	634	\$ 9,792,973
Concord*	16,833	2,987	17.75%	\$ 13,323	\$ 39,800,229	4,480	1,493	\$ 19,885,372
Winchester	21,181	3,752	17.71%	\$ 9,884	\$ 37,082,202	5,637	1,885	\$ 18,636,107
Needham	28,418	4,939	17.38%	\$ 10,788	\$ 53,278,293	7,563	2,624	\$ 28,309,437
Wellesley	26,978	4,446	16.48%	\$ 11,243	\$ 49,980,414	7,180	2,734	\$ 30,739,687
Hudson	18,943	2,771	14.63%	\$ 10,356	\$ 28,698,426	5,041	2,270	\$ 23,511,986
Framingham	65,060	7,965	12.24%	\$ 13,681	\$ 108,967,478	17,315	9,350	\$ 127,915,095
Arlington	41,224	4,615	11.20%	\$ 10,095	\$ 46,591,511	10,971	6,356	\$ 64,167,301

\* for Sudbury, Lincoln and Concord, this is a blend of K-8 and High School per pupil spending  
Source: FY05 Expenditures per Pupil, All funds, Summary by Function, DOE

## The Revenue Situation

Sudbury officials are faced with a great deal of uncertainty about the level of state aid we should count on as we prepare the FY08 budget. Governor Deval Patrick has pledged to increase state aid and end the over reliance on the property tax that has resulted from nearly six years of reductions or modest increases in state aid. Significant studies conducted during 2005 documented the reductions in aid and the devastating affect this has had on communities. The first, entitled "**Communities at Risk: Revisiting the Fiscal Partnership between the Commonwealth and Cities and Towns**" was developed by a Municipal Task Force chaired by John Hamill, Chairman of the





Sovereign Bank New England. This report documented that property taxes have been rising steeply and that unless the state stepped in with more state aid, deterioration in services or even higher property taxes were in the future. The Task Force concluded that local leaders have generally done a good job of controlling costs and it is not wasteful spending but reductions in support from the state that are forcing local officials to rely more on the property tax, a levy that is particularly burdensome for homeowners on fixed incomes. The report concludes that revenue sharing from the state should be increased, back to the level it was at in 1988 on a percentage basis, that local officials should be given flexibility in having other revenue sources available to us, and that we should be given more flexibility to control costs by reducing many of the constraints of state law. A copy of this report is on the Town's web site.

The second report continues this same theme. Entitled "**Revenue Sharing and the Future of our Massachusetts Economy**", it also documents the decline

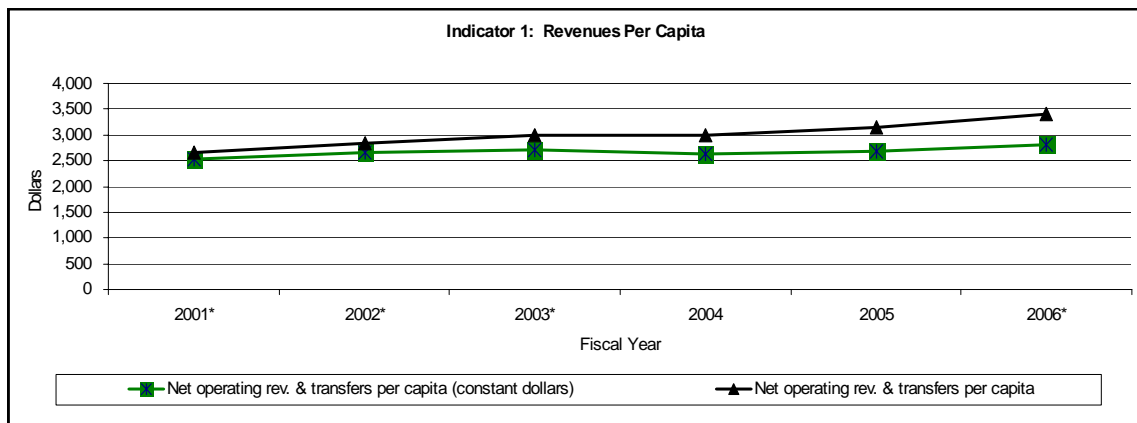


in spending on municipal services, particularly public works, as state aid for all but educational purposes has declined. This leaves municipalities, such as Sudbury, with few alternatives to increasing property taxes rather than allow town and educational services to decline in quality and quantity. This report also focuses on the long term implication of the continuation of the trend of high property taxes and declining services on the State's economy, concluding that the State needs

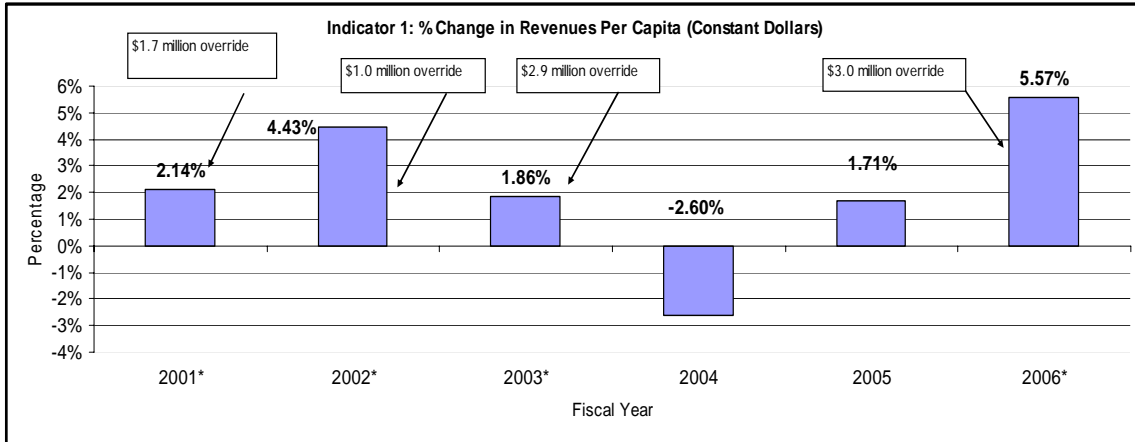
to provide more state aid, and give communities more flexibility in revenue options because this will help drive the overall economic engine of the Commonwealth.

Town staff has conducted our own analysis of our revenue patterns and how these trends send at the state level have played out in Sudbury, titled the "**Sudbury Financial Trends Monitoring Report**". Recently the Town Manager, Finance Director and Board of Selectmen invited the Finance Committee, the Capital Improvement Planning Committee, the Sudbury Public School Committee and the Lincoln-Sudbury Regional School Committee to a Financial Summit where we presented our findings.

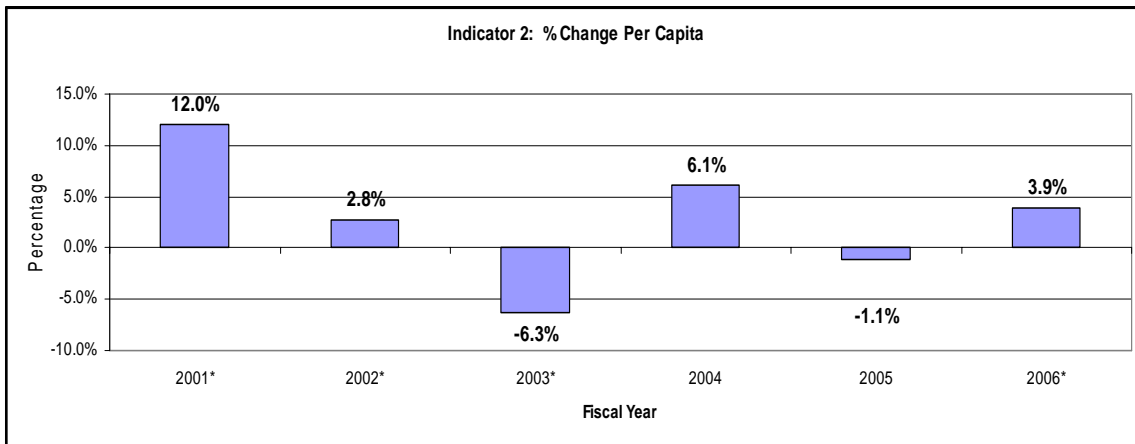
Indicator 1: Revenue Per Capita. There are two charts associated with this indicator. The first shows that while operating revenues have increased over the six years of this study by \$19 million, when the effects of inflation are factored in and adjusting for growth in population, revenues per capita in constant dollars were HIGHER in FY02 than in FY06. Overall, the annual growth in constant dollar revenues per capita average is less than 2%.



The second chart associated with this indicator shows the annual rate of change for revenues per capita from FY01 through FY06, and indicates in which years there were operating overrides and the amount of these overrides. This shows that in those years in which there is no override, there is very little growth in revenues to support budgets, which are impacted by the steady increases in pensions, health insurance, and energy costs.

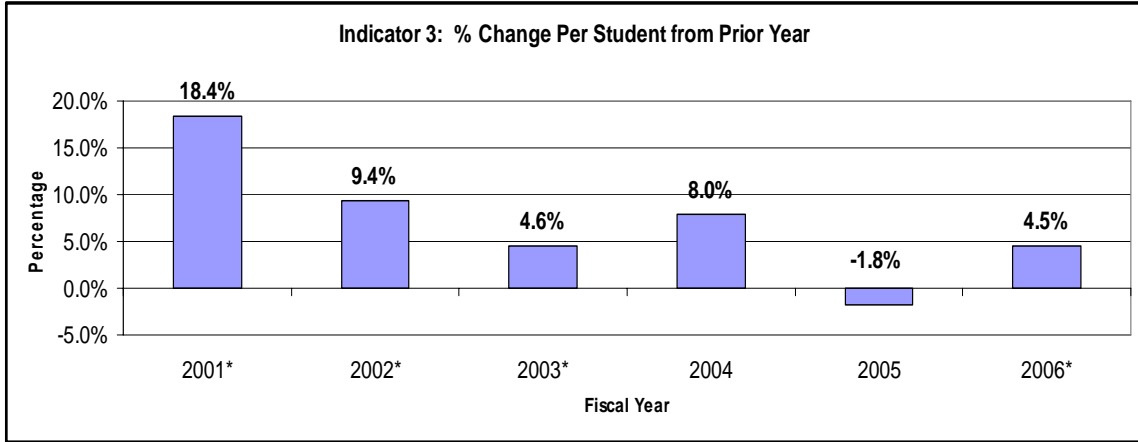


Indicator 2: State Aid Per Capita. This indicator shows that annual changes in state aid have been inconsistent since FY01, and even when there is an increase, it is not near the amounts seen in the late 90's through FY01. Actually, state aid has dropped from a high of 10.2% (it was 11% in FY99) of Sudbury's operating revenues to as little as 8.3% over the past six years. Overall, the state cutback of actual dollars allocated to Sudbury, as well as not keeping up with the annual increases that had been seen in the late 1990's, probably has meant a loss of \$1.5 million on an annual basis to Sudbury.

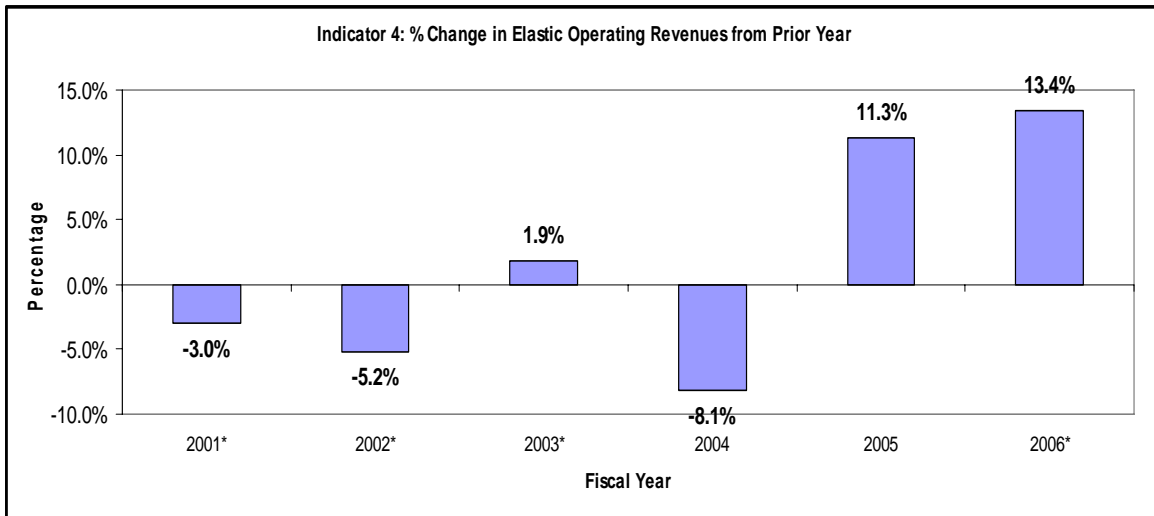
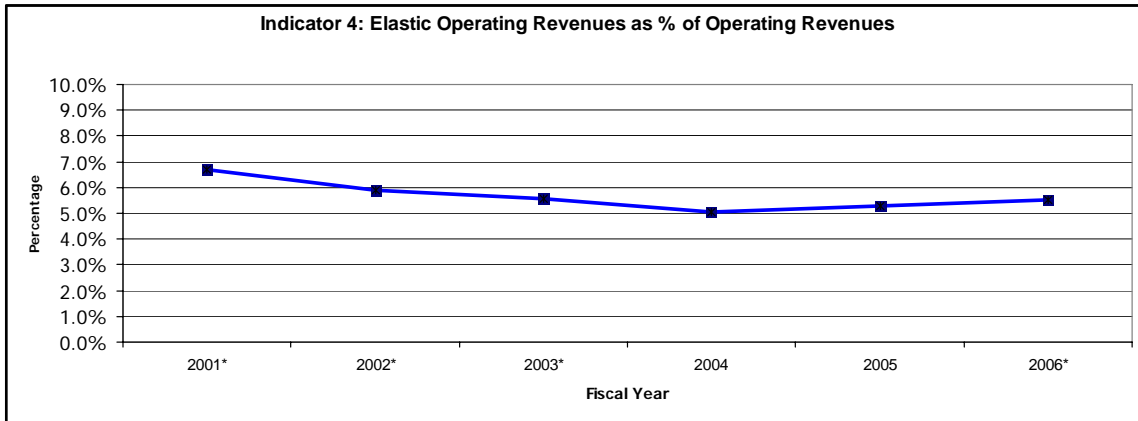


Indicator 3: Chapter 70 School Aid per student. This indicator focuses on the largest component of state aid for Sudbury: the Chapter 70 program. As can be seen, Sudbury received large annual increases in this aid up until FY2002 as our school population continued to grow. Then as the State began to experience financial difficulties, it began to slow down or even decrease this aid even as our enrollments were still very high, meaning the state shifted more of the cost of educating Sudbury students onto the local taxpayers.

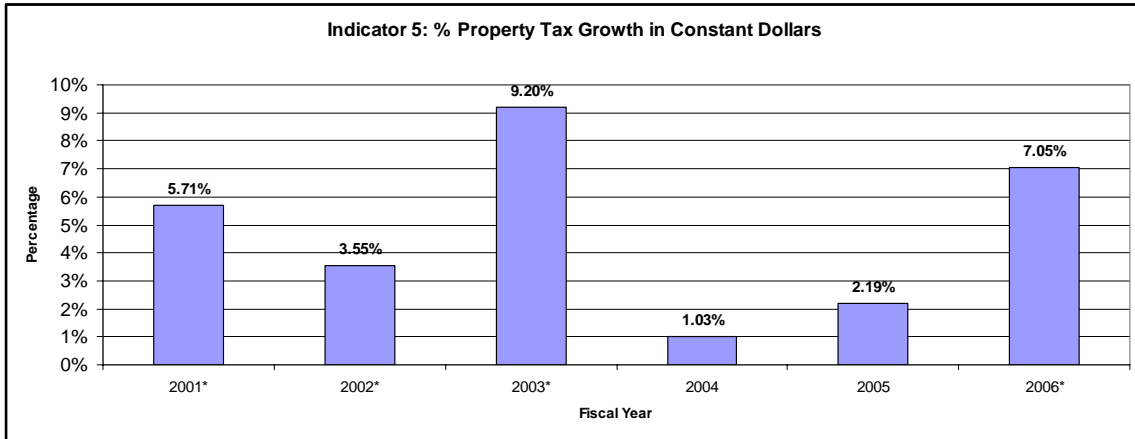
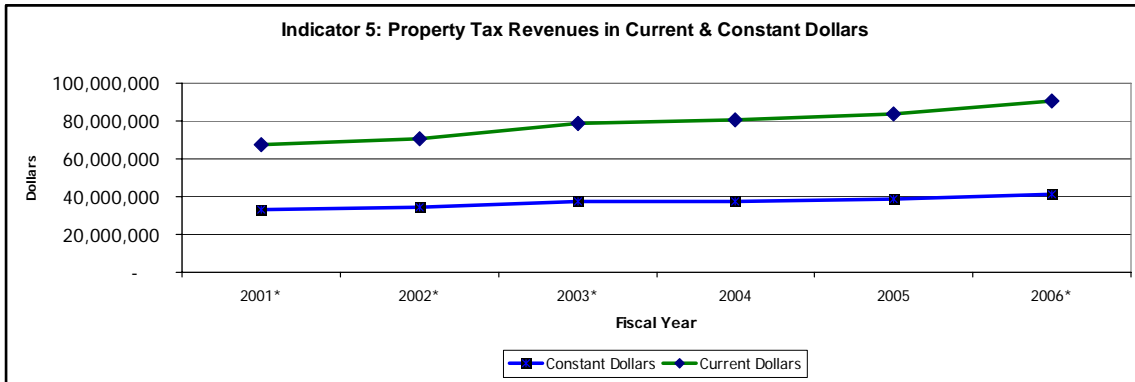




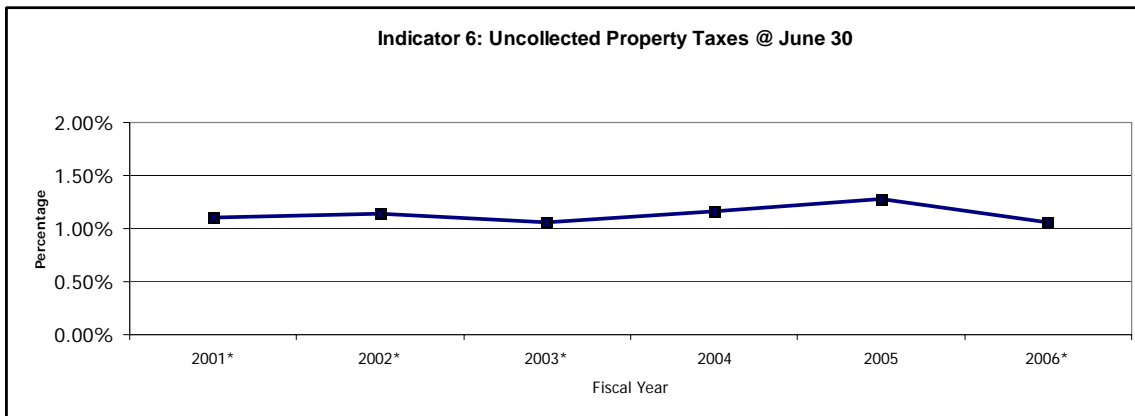
**Indicator 4: Elastic Revenues.** This indicator shows that Sudbury is only now starting to see growth in these revenues. The actual decrease in these revenues since FY01 compounded the difficulties that losses in state aid was already causing. Only in FY06 did we finally see these revenues exceed the FY01 level. If in FY06 elastic revenues were 7.4% of our total operating revenues as they were in FY01, they would totaled \$4.5 million instead of \$3.4 million. This loss, plus the loss in state aid, was made up by increases in the property tax.



**Indicator 5: Property Taxes.** This trend line shows that on a constant dollar basis Sudbury sees annual growth in this revenue source only when there is an operating override. Without overrides, the amount of revenue on a constant dollar basis generated by this revenue source is less than the 2 ½% annually that is commonly assumed with this property tax.

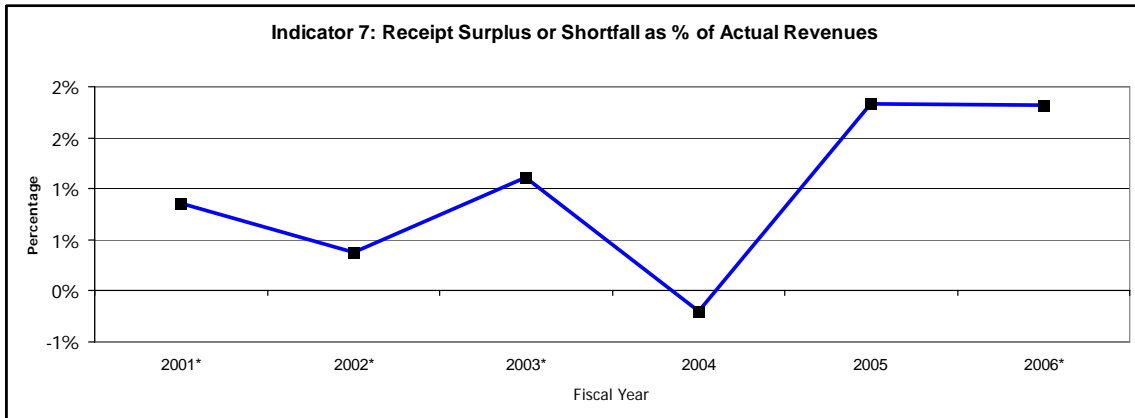


**Indicator 6: Uncollected Property Taxes.** This trend line shows that the Town has consistently collected nearly 99% of taxes owed by the end of the fiscal year, a very healthy trend.

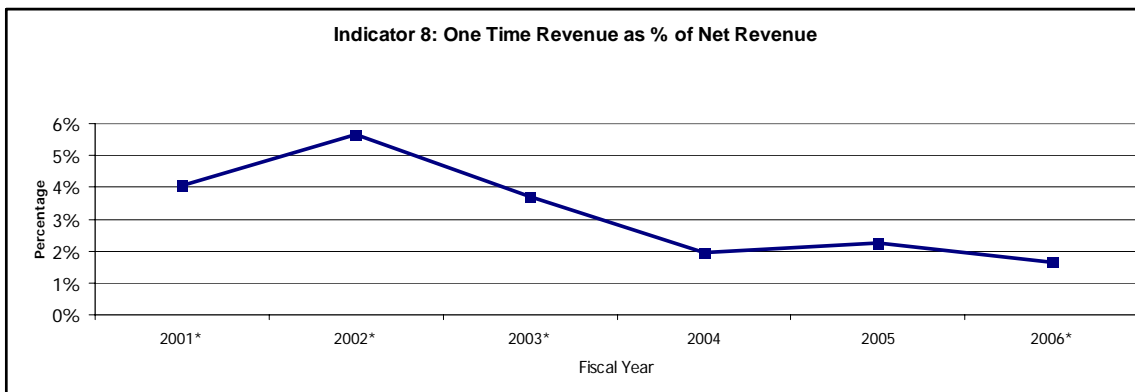


**Indicator 7: Revenue Shortfalls.** This trend line shows that the Town has been consistently conservative in making revenue forecasts, which helped the Town when revenues from state aid and elastic sources began to slow down and then decrease. In FY04 a revenue deficit was

narrowly avoided, and showed the wisdom of careful estimates in areas such as state aid, elastic revenues and one time revenues.



**Indicator 8: One Time Revenues.** This trend line shows that in FY2000 – FY2003 the Town relied on Free Cash to provide significant revenue for funding the budget. These funds were not as available in FY04 – FY06. The Town does establish a set amount of free cash that will be used to fund the budget, and hold the rest for as a rainy day fund for later appropriation.



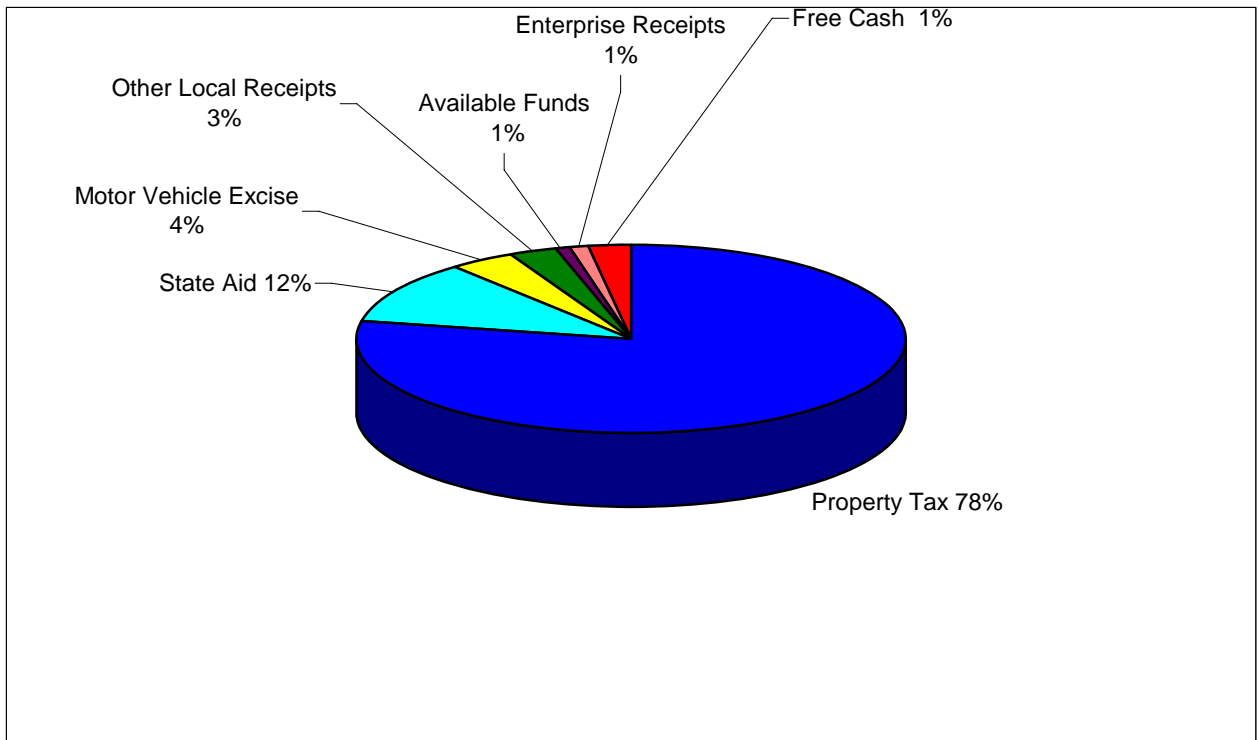
Overall, the indicator analysis of the Town's revenue bases shows on a constant dollar basis (adjusting for inflation) the growth in overall revenues has been steady, but only because of overrides in FY01, FY02, FY03 and FY06. Sudbury has become even more reliant on property taxes over the past six years, as state aid, elastic revenues and one time revenues became smaller portions of our revenue base. Residents showed a willingness to approve a large override for FY06, when both the Selectmen and the Finance Committee agreed that further deterioration in our service levels was not something that should occur without asking voters if they would raise approve an override of Proposition 2 ½ to provide the funds to prevent that from happening. And by all parties working together, an override was avoided in FY07.

The next section describes revenues projections for FY08.

## Revenue Projections for FY08

In this final section of the **Budget Overview** we present a discussion of revenues and fund accounting, discussing both the projections for FY08, the updated projection for FY06 now that the tax rate has been set (revenue totals won't be finalized until the end of the current fiscal year, when we have a final tally of all revenues that have been collected). We offer here six tables showing details of each of the major revenue sources, and present a detailed discussion on each revenue source's authorization, limits and important variables.

### FY08 Revenue Sources



Revenue Source	FY08
Within Levy Property Tax	53,752,102
State Aid	5,624,783
Motor Vehicle Excise	2,849,016
Other Local Receipts	1,993,536
Available Funds	728,608
Enterprise Receipts	760,328
Free Cash	1,900,000
<b>Subtotal, within levy</b>	<b>67,608,373</b>
Excluded Property Taxes	4,304,085
School Construction State Aid	2,816,206
<b>Total Projected Revenues</b>	<b>74,728,664</b>

## Revenues and Fund Accounting

**General Fund.** Nearly all the revenues (99%) used to support the *FY08 Proposed Annual Budget and Financing Plan* are accounted for in the General Fund. General Fund budgeting and accounting is done on a modified accrual basis meaning that revenues are recognized when they become measurable or available (cash basis), while expenditures are accounted for in the accounting period incurred (accrual basis). General Fund Revenues are projected to be \$73,714,728 for FY08.

**Enterprise Fund.** Enterprise Funds are used for activities that are fully financed through user charges. Budgeting for enterprise funds is done on a GAAP (Generally Accepted Accounting Principles) basis. The Town runs two operations on an enterprise fund basis: The Solid Waste Transfer Station and the Atkinson Pool. All direct and indirect costs of the Transfer Station and all direct costs of the Atkinson have been built into the fees charged. Enterprise Fund Revenues are projected to be \$760,328 for FY08.

**Special Revenue Funds.** These are funds that have a specific purpose that is restricted by law. Town Meeting does not appropriate these funds.

**Community Preservation Fund.** Community preservation surcharges are levied annually and at a rate of 3% of residents' real estate tax bills with exemptions for the first \$100,000 of residential property and property owned by qualified persons with low income and seniors (60+) with low or moderate income as defined by Department of Revenue guidelines. These funds are limited to specific types of projects – open space preservation, historical preservation, affordable housing, and recreation – and cannot be used for operating or maintenance purposes. Funds are appropriated by Town Meeting through separate articles, not as part of the Annual Operating or Capital Budget.

## Revenue Summary

	FY07 Projected	FY08 Projected	Dollar Change	Percent Change
Property Tax Levy (net of exclusions)	51,904,490	53,752,102	1,847,611	3.56%
State Aid-Cherry Sheet (net of SBA)	5,863,671	5,624,783	(238,888)	-4.07%
Local Receipts	4,671,559	4,842,552	170,993	3.66%
Free Cash	1,475,243	1,900,000	424,757	28.79%
Available Funds	796,461	728,608	(67,853)	-8.52%
Subtotal: General Operating Fund	64,711,424	66,848,045	2,136,620	3.30%
Enterprise Funds	728,516	760,328	31,812	4.37%
Total Available for Operating Purposes	65,439,940	67,608,373	2,168,432	3.31%
Property Tax Outside Levy (Debt Exclusions)	5,610,947	4,304,085	(1,306,862)	-23.29%
School Construction Reimbursement (SBAB)	2,816,206	2,816,206	-	0.00%
<b>Total Revenue Projection</b>	<b>73,867,093</b>	<b>74,728,664</b>	<b>2,168,432</b>	<b>2.94%</b>

## Property Tax Growth

	FY06	FY07 Projected	FY08 Projected	Dollar Change	Percent Change
Previous Year Levy	45,183,865	50,101,942	51,904,489	1,802,548	3.60%
2.5% over prior levy	1,129,597	1,252,549	1,297,612	45,064	3.60%
New Growth	738,480	550,000	550,000	-	0.00%
Override	3,050,000	-	-	-	0.00%
<b>Total Tax Levy (excluding debt exemptions)</b>	<b>50,101,942</b>	<b>51,904,490</b>	<b>53,752,102</b>	<b>1,847,611</b>	<b>3.56%</b>

### Assumptions:

**Property Tax Levy. Projection: \$53,752,102.** Sudbury's property tax levy is anticipated to increase by \$1,847,611 or 3.60 percent. This is exclusive of excluded debt service.

As provided under Proposition 2 ½, local governments are permitted to increase property taxes 2.5 percent over the previous years' tax levy limit. In addition, a community may increase its property tax levy by what is known as "new growth." New growth reflects an increase in the property tax levy resulting from new residential and commercial construction in the community.

The new growth estimate for FY08 is based on new residential and commercial construction that occurred during calendar year 2006. This estimate of \$550,000 is based on information provided by the Board of Assessors.

## State Aid/Local Aid

	FY06 Actual	FY07 Projected	FY08 Projected	Dollar Change	Percent Change
Dist., reimb., offsets	1,256,200	1,105,193	866,305	(238,888)	-21.62%
Chapter 70 (school aid)	3,502,825	3,676,919	3,676,919	-	0.00%
Lottery Aid	895,816	1,081,559	1,081,559	-	0.00%
<b>Subtotal: General Purpose State Aid</b>	<b>5,654,841</b>	<b>5,863,671</b>	<b>5,624,783</b>	<b>(238,888)</b>	<b>-4.07%</b>
School Construction (SBAB)	2,816,206	2,816,206	2,816,206	-	0.00%
<b>Total State Aid</b>	<b>8,471,047</b>	<b>8,679,877</b>	<b>8,440,989</b>	<b>(238,888)</b>	<b>-2.75%</b>

### Assumptions:

**State Aid:** State aid, which is also referred to as Cherry Sheet aid or local aid, is a function of the State budget. Our first indication of State aid for FY08 will come when Governor Patrick files his FY08 budget with the Legislature in January 2007. This budget, known as "House 2" will include his recommendations for school aid (Chapter 70) and lottery distributions. Governor Patrick has promised to increase State Aid by significant amounts statewide. In order to move

forward with the budgeting process for the Town, we will most likely use the state aid figures in the Governor's budget bill, but for now we are level funding these revenue estimates.

1. **Distributions, Reimbursements and Offsets. Projection: \$866,305.** This category includes various State aid programs such as School Transportation, Charter School Reimbursements, Additional Assistance and Police Career Incentive payments. This is a projected 21.62% loss compared to FY07 in this category. The reason for this drastic decrease however is largely due to the reclassification of the METCO grant for State Cherry Sheet reimbursement.
2. **Chapter 70 Aid. Projection: \$3,676,919.** Chapter 70 assistance is Sudbury's largest category of State aid. In previous years Chapter 70, also known as educational assistance, has been based on a formula which includes a variety of enrollment and community factors. Because Sudbury's educational spending exceeds the State's minimum requirements, Chapter 70 aid increases have been limited to per pupil minimum aid amounts in recent years. Discussion continues at the state level regarding creation of a new funding formula. This line item has been level-funded showing no increase over FY07.
3. **Lottery Aid. Projection: \$1,081,559.** This line item has been level-funded showing no increase over FY07.
4. **School Construction. Projection: \$2,816,206.** This aid is a function of reimbursements for the Sudbury Public School construction and renovation projects. The FY08 projection assumes 100% funding for 4 projects- Nixon #3564, Curtis #2778, Haynes #3779, and Loring #3800. These amounts, however, must be directly used to reduce the amount of the Proposition 2 ½ debt exclusion for these projects and, therefore, are not available for appropriation by Town Meeting.

## Local Receipts

	FY06 Actual	FY07 Projected	FY08 Projected	Dollar Change	Percent Change
Motor Vehicle Excise	2,965,914	2,791,912	2,849,016	57,104	2.05%
Other Excise	52,051	66,000	52,051	(13,949)	-21.13%
Penalties & Interest	336,788	260,000	283,100	23,100	8.88%
PILOT	65,409	90,000	65,409	(24,591)	-27.32%
Fees	127,433	125,000	122,787	(2,213)	-1.77%
Rentals	137,604	170,000	137,604	(32,396)	-19.06%
Departmental Revenues	64,661	72,000	56,710	(15,290)	-21.24%
Licenses & Permits	651,619	590,869	609,235	18,366	3.11%
Fines & Forfeits	140,685	100,000	113,557	13,557	13.56%
Investment Income	468,676	200,000	303,084	103,084	51.54%
Chapter 203	58,141	60,000	60,000	-	0.00%
Melone Gravel Sales	100,000	100,000	100,000	-	0.00%
Miscellaneous	416,611	45,778	89,999	44,221	96.60%
<b>Total Local Receipts</b>	<b>5,585,592</b>	<b>4,671,559</b>	<b>4,842,552</b>	<b>170,993</b>	<b>3.66%</b>

### Assumptions:

Local Receipts are those fees and charges which may be imposed by a municipality. Massachusetts General Law Chapter 40 Section 22(f) provides that *“any municipal board or officer empowered to issue a license, permit, certificate or to render a service to perform work for a person or class of persons may, from time to time, fix reasonable fees...”* This is a local acceptance statute which was approved at the 1992 Annual Town Meeting. Overall, local receipts have started a slow recovery over the past two years. Most of these revenues are very sensitive to the economy, and we hope we will continue to see a rebound as the year-to-date figures indicate for FY07. Until then, expectations for this revenue source remain cautiously optimistic and we are projecting receipts for FY08 to be equivalent to the actual receipts for FY05.

- 1. Motor vehicle excise. Projection: \$2,849,016.** The projection represents a 2.05% increase over the FY07 estimate. This assumption will be revisited when the first commitment of calendar year 2007 is received from the Registry of Motor Vehicles, which should be around March 1, 2007.
- 2. Other excise. Projection: \$52,051.** This revenue comes from hotel/motel taxes. This projection is based on actual receipts over the past 2 years and on year-to-date information for FY07.
- 3. Penalties and interest. Projection: \$283,100.** The projection represents an increase over the FY06 actual receipts and a slight increase substantial increase over the FY07 projection. More delinquent taxpayers have been able to begin to pay their overdue taxes and the interest and penalties that have accrued. This is represented in the increased receipts in this area that we have seen. As the economy improves and more people are able to pay their taxes on time before interest and penalties accrue, these receipts will likely level off.
- 4. Payment in lieu of taxes (PILOT). Projection: \$65,409.** This revenue is limited to the three accounts with which the Town has agreements for PILOT (Wayside Inn, US Fish and Wildlife Service, Sudbury Public Housing Authority). Based on the past 3 year's receipts, this is a realistic projection.



5. **Fees. Projection: \$122,787.** Fees include charges for application, tax administration, municipal lien certificates, tax redemptions, and administration fees for police detail. This projection reflects a slight decrease over the actual receipts in FY06. In FY07 we have not seen an increase over the same time last year.
6. **Rentals. Projection: \$170,000.** We have projected receipts in this area will be equivalent to FY06. The major fee in this category is for cell tower leases. Town staff has worked diligently to obtain lease agreements for cell towers on town owned land.
7. **Departmental Revenues. Projection: \$137,604.** These are small amounts taken in by departments for such things as photocopy charges, sale of voter lists, etc. The projection is based on FY06 collections continuing on target to date.
8. **Licenses and permits. Projection: \$609,235.** These include building permits, which represents the largest portion of this category and charges for licenses. This projection represents a 3.11% increase over projected revenues for FY07.
9. **Fines and forfeits. Projection: \$113,557.** Fines include charges for false alarms, parking tickets, court fees, and for over due library materials. We have used a larger projection from FY07 based on recent trends.
10. **Investment income. Projection \$303,084.** The projection represents a substantially large increase over projected receipts for FY07. Indications are that there will be a moderate decrease for our actual investment returns in FY06. Rates remain low, but average daily balances are growing due to increased collections.

### Use of Reserves, Free Cash and Available Funds

	FY06 Actual	FY07 Projected	FY08 Projected	Dollar Change	Percent Change
Retirement Trust Fund	25,000	25,000	25,000	-	0.00%
Abatement/Overlay Surplus	543,450	511,119	450,000	(61,119)	-11.96%
Town Meeting Articles - Remaining Balances	23,000	-	-	-	0.00%
Cops Fast Grant	-	30,000	23,266	(6,734)	-22.45%
Ambulance Reserve	210,189	230,342	230,342	-	0.00%
Subtotal: Available Funds	801,639	796,461	728,608	(67,853)	-8.52%
Free Cash	800,000	1,475,243	1,900,000	424,757	28.79%
<b>Total Free Cash &amp; Available Funds</b>	<b>1,601,639</b>	<b>2,271,704</b>	<b>2,628,608</b>	<b>350,170</b>	<b>15.41%</b>

### Assumptions:

1. **Free Cash Projection: \$1,900,000.** Free Cash is certified by the Department of Revenue. Free Cash (undesignated fund balance) is largely a function of prior year revenue collections in excess of estimates and prior year expenditures less than appropriations.
2. **Abatement/ Overlay Surplus Projection: \$450,000.** A reserve for property tax abatements and exemptions is created each year in the Overlay account. Overlay Surplus becomes available when it is determined that all claims for abatements and exemptions of a specific fiscal year have been resolved. Per State statute, this amount must be formally voted by the Board of Assessors before it is available for appropriation.

3. **Ambulance Reserve for Appropriation Projection: \$230,342.** Fees are collected for use of the Town's ambulances. These fees are set aside in a separate account to offset future ambulance and related expenses. In FY08 this amount will be used to purchase ambulance supplies, equipment, and to fund EMT stipends.

**Enterprise Funds: Pool Enterprise**

	FY07	FY08	Dollar	Percent
Pool Enterprise	Projected	Projected	Change	Change
Revenue	430,000	440,000	10,000	2.3%
Retained Earnings used	6,713	17,842	11,129	165.8%
Subsidy-Taxation	48,615	62,198	13,583	27.9%
<b>(Expenses)</b>	<b>(485,328)</b>	<b>(520,040)</b>	<b>(34,712)</b>	<b>7.2%</b>
<b>Total Pool Enterprise</b>	<b>-</b>	<b>-</b>	<b>-</b>	

**Revenue Projection: \$440,000.** All receipts for pool rentals and programming go into the enterprise fund.

**Retained Earnings used: Projection: \$17,842.** Any revenue in excess of expenses from the prior year is recorded as retained earnings. Once certified, retained earnings are available to use to help fund the budget.

**Subsidy-taxation: Projection: \$62,198.** As has been the practice in recent years, the pool is expected to cover all of its direct costs, and the cost of the benefits for the employees is charged to the tax levy. The subsidy thus equals the costs of the benefits.

**Enterprise Funds: Transfer Station Enterprise**

	FY07	FY08	Dollar	Percent
Transfer Station	Projected	Projected	Change	Change
Revenue	291,803	302,486	10,683	3.7%
Retained Earnings used	-	-	-	0.0%
Subsidy	-	-	-	0.0%
<b>(Expenses)</b>	<b>(291,803)</b>	<b>(302,486)</b>	<b>(10,683)</b>	<b>3.7%</b>
<b>Total Transfer Station Enterprise</b>	<b>-</b>	<b>-</b>	<b>-</b>	

**Revenue Projection: \$302,486.** All receipts for transfer station fees go into the enterprise fund. Receipts are projected to increase 3.7% increase.

**Retained Earnings used Projection: \$0.** Any revenue in excess of expenses from the prior year is recorded as retained earnings. Once certified, retained earnings are available to use to help fund the budget.

**Subsidy Projection: \$0.** None is needed.

## **Projected Changes in Fund Balance in the General Fund**

The general fund balance is projected to be the same or grow slightly at the end of FY08. Conservative revenue projection combined with strict adherence to the appropriations of Town Meeting insures that the fund balance of the general fund does not unintentionally decrease from year to year. The fund balance of the Town's general fund increased FY06, per the Town's FY06 financial statements.

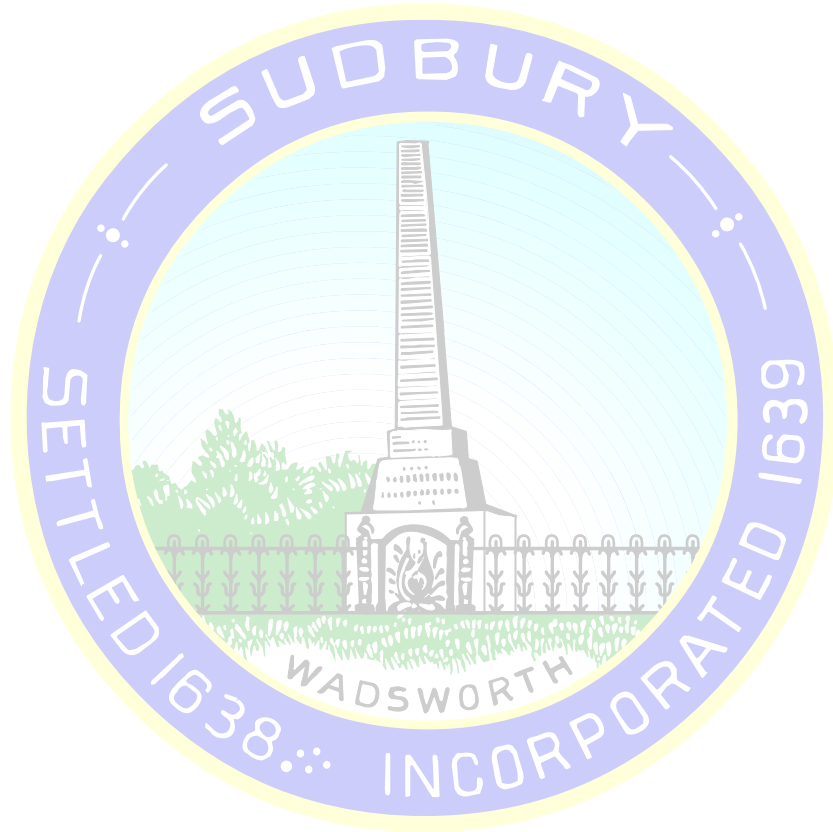
As stated earlier, the Community Preservation Fund is reserved for projects in four limited areas, and amounts collected in this fund are projected to continue to accumulate as the Town prepares to purchase sizeable parcels of land as they become available.

## **Audit Financials for FY06 to be inserted upon audit completion**



# Section Four

## TOWN OPERATING DEPARTMENTS



# Town Manager's FY08 Recommended Budget for Town Operating Departments

This ***FY08 Recommended Budget for Town Operating Departments*** that I am recommending for approval by the Finance Committee is a level of funding that should ensure the same level of public safety, protection of public assets, and protection of the quality of life that the FY07 budget affords, as well as provides slight increase in key service areas to keep pace with the demands of population growth or new technology. I also present in this section an ***FY08 Level Services Budget for Town Operating Departments***, even though the Finance Committee did not request such a budget scenario, as it's important to understand that any budget funding below this amount constitutes a reduction in services.

Below is a summary of the significant highlights of the ***Level Services*** budget, both compared to FY07 and as they relate to the challenges facing the Town, followed by an identification of what is added to get to the ***Recommended Budget***. For further information, a great deal of detail, both narrative and numerical, is found in each of the departmental budget pages which follow.

1. **Cost of Living Adjustment:**
  - a. **A COLA of 3.0% has been made for Town employees not covered by a contract or collective bargaining agreements.** Wage adjustments for these employees are not arrived at by collective bargaining but are determined at the discretion of the Town Manager. This 3.0% is a minimal wage adjustment that when added to the FY07 adjustment averages to 2.25% over the two year period.
  - b. **No wage adjustment is shown for any of the Town's collective bargaining groups, as all contracts are currently in negotiation.** Some funds for settlement of contracts for these employees are requested in the salary contingency line item; if the final negotiated increases exceed these amounts after Town Meeting adjourns, then a special town meeting will need to be held to appropriate those funds.
2. **Critical Level Service Staffing**
  - a. A part-time position (30 hours per week) has been created to be shared between the Board of Health and the Conservation Commission offices. Both these offices have NO OTHER professional staff besides the department manager. This creates a level of workload demand on these two professionals that has become nearly impossible to carry, leaves the Town open to a crisis situation if either of these professionals was suddenly unable to do their jobs, and sustains a risk for the Town that priority work will not get performed by an important deadline. This added position is designed to be an entry level analyst. The Town will most likely have to pay for added training and credentialing for this person so that they can assume some of the permit related work of this office.
  - b. A part-time position (30 hours per week) has been restored to be shared between the Personnel/Assistant Town Manager's Office and the Finance Director/Treasurer-Collector's Office. Both these offices have NO OTHER professional staff besides the department manager. This creates a level of workload demand on these two professionals that has become nearly impossible to carry, leaves the Town open to a crisis situation if either of these professionals was suddenly unable to do their jobs, and sustains a risk for the Town that priority work will not get performed by an important deadline. This added position is designed to be an entry level analyst with education and/or training in management and personnel.
3. **DPW vehicle replacement, repair and maintenance remains a problem.** The Town continues to rely on lease purchases for replacing DPW fleet vehicles, and faces a backlog of needs even with such leasing. The Town has not been able to outright purchase vehicles for several years now. We need to be able to move away from this pattern and start allocating a recurring sum of money for vehicle replacement as an operating cost of this department.

Related to the aging DPW fleet is the cost of repairs and maintenance, and the amount budgeted for FY07 has already been depleted before the year is half over. This amount has been increased by \$47,550 in the *Level Service Budget*, and an extra \$25,000 has been added in the *Recommended Budget*.

4. **Utilities Changes.** The Town was protected from FY07 utility shock due to the long term contracts we had locked in several years ago but those have lapsed now. The Town's contract for electricity expired midway through FY07, and now we are paying nearly double the rate as we have enjoyed for the past several years. We have budgeted over \$106,140 more for utilities costs for FY08.
5. **Gasoline Costs.** Additionally, gasoline costs have increased. In the past all gasoline costs were covered out of the DPW budget. Beginning in FY07 I moved to the Police and Fire Departments the costs of gasoline for their vehicles. This has helped them monitor how their department staff uses this commodity. DPW covers the gasoline used by all other town vehicles, including many not used by that department. We have budgeted an additional \$45,569 for gasoline costs over the FY07 appropriation.
6. **Increase in Contracted Services.** The Town relies on many contracted services to fulfill our mission. The cost of these contracts continues to rise. We can't do without these services. They range from the maintenance costs of our financial software, audit services, nursing services, mosquito control, maintenance of public safety communications equipment, etc. All contracts for mission critical services have been funded at the level called for in the contract.
7. **The Reserve Fund budget is the same as FY07.** My ability as Town Manager to move modest amounts of funds within functions has meant that there has been a reduced need to ask for transfers from the Reserve Fund compared to years ago. Nevertheless, the \$145,000 requested is as low as this fund safely can go without potentially jeopardizing critical Town operations. Please see the detailed explanation in this budget narrative.

There are nine items that I have presented in the *Recommended Budget* but not in the *Level Services Budget*.

1. Restoring the Goodnow Library to a budget level that allows for additional weekend/evening hours of operation, adds hours to adjust for the increased demand on staff from the high utilization of the Library, and strengthens the collections of the Library. Together, funding these requests would cost about \$88,760 over the Level Services budget.
2. Creating a GIS Administrator position in the Information Systems Department. The Town has been working on developing a GIS implementation program for several years, and has reached the stage where a dedicated staff person and specialized equipment, software and data are needed to move forward. The estimated salary cost is approximately \$57,000. The equipment and software request is contained in the Capital Budget.
3. Creating a new staff firefighter position in the Fire Department. This position would take over much of the inspectional work from the Chief and the Assistant Chief. It is hoped this position would enable the Department to be able to reduce overtime costs by assigning this person to line vacancies during the day. The net cost of this proposal is approximately \$15,000 in the Fire Department budget, plus the cost of benefits.
4. Adding \$25,000 to the Vehicle Maintenance line beyond what is calculated by the DPW Director to be Level Services. The DPW's Director's request is a bare minimum to keep the fleet of Town vehicles repaired and running and providing the appropriate amount of preventative maintenance, tire replacements, etc.
5. Changing the funding for the Park & Recreation Department's Program Coordinator, adding 15 more hours to the amount this position is funded through the levy. The cost of this enhancement is just under \$20,000. This change is recommended because this position is responsible for more activities than just those funded by user fees.
6. Adding \$5,500 to the Technology Budget so that maintenance contracts on the Town's mission critical switches, routers and firewall can be purchased. The contracts cover support, upgrades and replacements within 24 hours, so the Town can reduce downtime. These contracts will protect equipment valued at \$39,000.

7. Adding five hours to the Council on Aging Van Driver position. The COA van provides a transportation resource for both seniors and those with disabilities younger than 60. The cost of this addition is \$3,620.
8. Adding \$10,000 to the Trees & Cemeteries division for planting of shade trees. This request was made at the request of the Historic Districts Commission, the Historical Commission, the Permanent Landscape Committee, and the Design Review Committee. They have noted that the Town has had to take down shade trees due to public safety concerns, but it would be good if the Town could plant new trees to replace those removed. These funds are recommended to begin accomplishing that goal.
9. Adding \$18,570 to supplement the current contract for periodic landscaping maintenance so that certain Town buildings – the Goodnow Library, Fire Station, Police Station, Town Hall, etc. would get twice a year intensive cleaning and trimming. Similar attention already given to the school grounds has hugely improved their appearance. This line item increase would allow the same level of attention to the Town buildings.

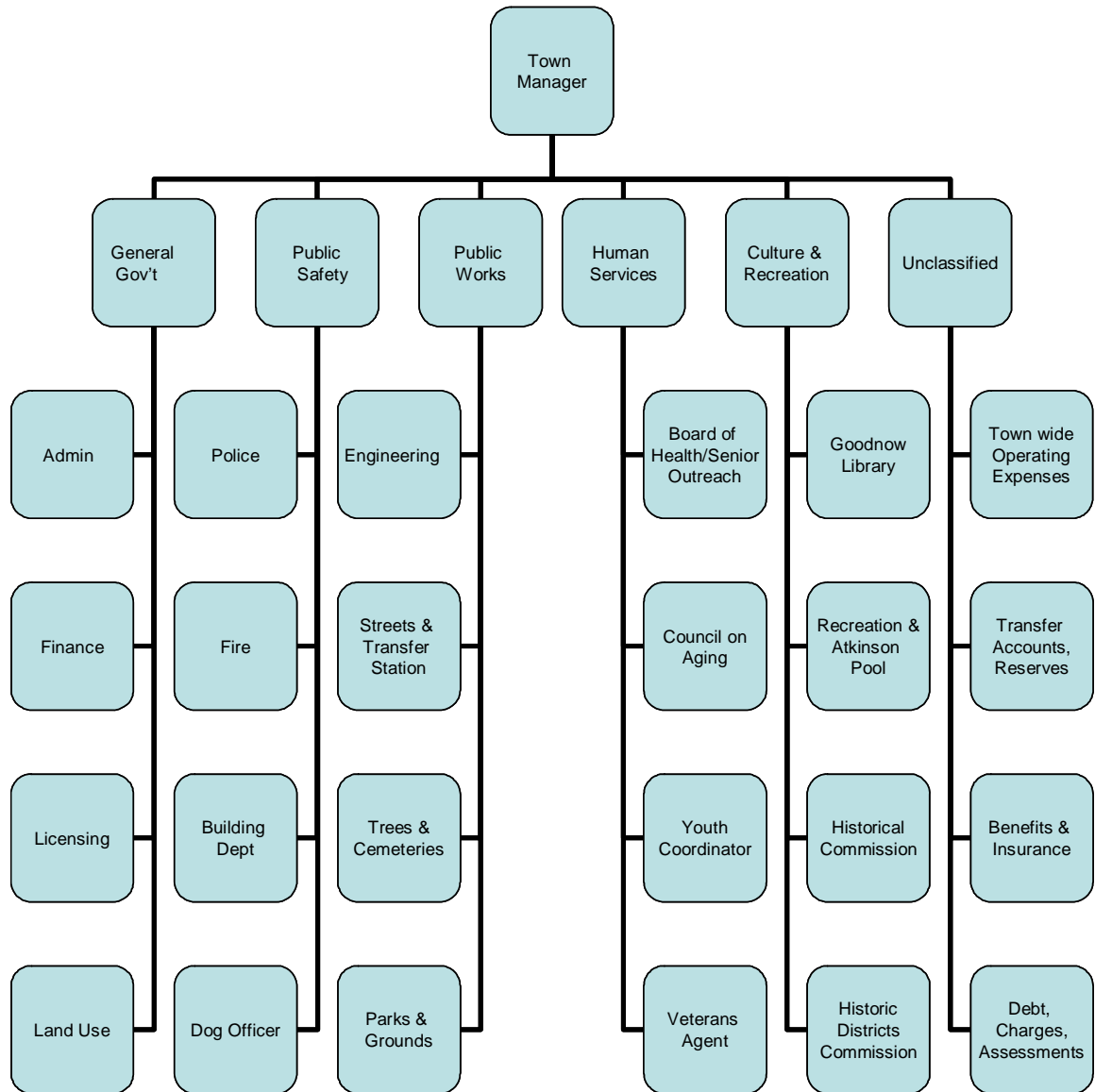


## Summary

### FY08 Town Manager's Recommended Budget Request for Town Operating Departments

	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
General Government	2,091,735	2,219,104	2,281,312	2,152,403	2,281,312
Public Safety	6,091,379	6,265,857	6,294,007	6,206,229	6,286,907
Public Works	3,068,845	3,343,523	3,391,953	3,283,009	3,391,953
Human Services	558,369	592,893	596,513	575,240	596,513
Culture & Recreation	1,027,672	1,058,648	1,214,107	1,058,647	1,167,322
Unclassified/Transfers	421,819	452,274	452,274	451,274	452,274
<b>Total Town Mgr Services</b>	<b>13,259,819</b>	<b>13,932,298</b>	<b>14,230,165</b>	<b>13,726,802</b>	<b>14,176,280</b>
Increase over FY07		5.07%	7.32%	3.52%	6.91%

# Budget Accounts under the Direction of the Town Manager



# GENERAL GOVERNMENT SERVICES



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>GENERAL GOVERNMENT</b>						
Selectmen/Town Manager	288,187	273,547	293,257	293,257	289,257	293,257
ATM/Personnel	123,136	122,422	151,366	151,366	133,913	151,366
Law	155,694	162,586	164,959	164,959	164,959	164,959
Finance Committee	1,835	1,959	2,007	2,007	2,007	2,007
Accounting	276,538	271,656	261,900	261,900	261,400	261,900
Assessors	244,593	251,813	258,615	258,615	258,615	258,615
Treasurer/Collector	222,798	248,436	278,950	278,950	261,797	278,950
Information Systems	277,386	296,275	304,703	366,911	304,703	366,911
Document Preservation	1,000	1,500	1,750	1,750	1,600	1,750
Town Mgr Clerk & Registrars	210,526	223,180	223,690	223,690	223,690	223,690
Conservation	78,514	80,148	98,221	98,220	81,068	98,220
Planning Board	105,329	132,021	146,762	146,762	142,470	146,762
Board of Appeals	25,690	26,192	32,922	32,922	26,922	32,922
<b>Total General Government</b>	<b>2,011,226</b>	<b>2,091,735</b>	<b>2,219,104</b>	<b>2,281,312</b>	<b>2,152,403</b>	<b>2,281,312</b>

## **GENERAL GOVERNMENT: Selectmen/Town Manager**

### **MISSION OF THE OFFICE**

The Board of Selectmen and Town Manager provide executive leadership for the Town of Sudbury. Together, we pursue collaborative process and ethical and professional procedures to insure that Town resources are directed to providing the best services possible to protect public safety, public assets and a special quality of life in Sudbury. This office supports the Board and the Town Manager as they work toward this mission.

### **DESCRIPTION OF SERVICES**

The Board of Selectmen is the executive branch of the Town government. The Board consists of three members, each elected for a three-year term. They serve without compensation. The Selectmen act as the primary policy-making body for the Town. They provide oversight for matters in litigation, act as the licensing authority for a wide variety of licenses, conduct site plan reviews, and enact rules and regulations for such matters as traffic control, and serve, along with the Town Treasurer, as Trustees of Town Trusts. The Town Manager is appointed by the Board of Selectmen, and is responsible for the management of all Town departments. The Town Manager is the appointing and contracting authority for all departments except the schools and the health department, and is responsible for overseeing all budgetary, financial and personnel administration activities of the Town. This includes preparing the annual budget, appointing all new staff and setting compensation, formulating and implementing personnel policies, and negotiating all contracts with the Town's union employees. Administrative staff in the office serves as liaison between the public and the Board, handles all telephone calls, visitors and correspondence directed to the office, and maintain all records of Board of Selectmen's meetings. The office staff prepare the warrants for all annual and special town meetings, election notices for all elections, and coordinates the Town's annual report. They maintain records of all committee and board appointments and resignations. They maintain the Selectmen's section of the Town's web site.

### **STAFFING**

Staff in the Selectmen/Town Manager's office includes the Town Manager, the Administrative Assistant to the Board, an office supervisor, a part-time recording secretary and hours for part-time assistance as needed at peak work times. Additionally, some clerical hours are provided by seniors working on the Tax Work-Off program, in exchange for a reduction in their property tax bill.

### **FY08/07 GOALS AND INITIATIVES**

- Complete the Town's preparations for emergencies, including pandemic planning, continuity of operations and disaster recovery
- Develop a detailed 5 year Capital Plan with financing options
- Bring the Police Station article to Town Meeting
- Update Cemetery rules and regulations
- Begin the work of the Housing Trust
- Begin the work of a Traffic Safety Coordinating Committee
- Begin the work of a new Solid Waste Options Committee
- Resolve the legal efforts to end the pollution of the Hop Brook pond system
- Examine ways to continue the No Place for Hate concept
- Develop a long-range plan to provide for "catch-up" funding for DPW heavy equipment

### **FY07/06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Held the 7<sup>th</sup> Annual Financial Summit
- Updated the long range financial forecast and outlook for the Town

- Adopted Budget and Financial Management Policies for the Town
- Created a committee to plan for restoring and improving the Town Centre. The committee developed and issued an RFP for engineering services to assist with process
- Created a new Ponds and Waterways Committee
- Continue legal efforts to end the pollution of the Hop Brook ponds
- Developed an overall Energy Management Program for the Town
- Developed the C.A.R.E Program – Cost Avoidance and Revenue Enhancement Efforts by Town staff (See Appendix 5 of this budget document for a copy of the program)
- Developed improved communication efforts including a new email newsletter from the Town Manager, and enhanced use of the local access cable channel and the Town's web site.
- Obtained commitment from Emerson Hospital to continue to provide Advanced Life Support services in Sudbury

## **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget is the same as the Level Services Budget. Thus, this budget maintains the same personnel and covers the same basic expenses of running the office. This budget contains sufficient funds for a 3.0% cost of living adjustment for the employees of this office. Additionally this budget includes funds for the membership costs for the Town to move from the Metro West Growth Management Committee sub-regional group to the MAGIC sub-regional planning group and funding for participation in several regional groups such as SUASCO for compliance with storm water management requirements and MAGIC for an all hazards identification and mitigation project. Additionally, the part-time economic development specialist position, which was originally cut in FY04, is still not restored under this budget.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>SELECTMEN/TOWN MANAGER</b>						
Town Manager	129,197	133,092	140,997	140,997	140,997	140,997
Administration	54,866	50,838	55,780	55,780	55,780	55,780
Overtime	1,660	2,000	2,000	2,000	2,000	2,000
Clerical	61,202	45,517	48,431	48,431	48,431	48,431
Executive Incentive Program	9,250	11,250	13,000	13,000	12,500	13,000
Non-accountable Travel	-	3,825	4,500	4,500	4,500	4,500
Sick Leave Buy Back	1,262	-	-	-	-	-
<b>Sub Total: Personal Services</b>	<b>257,437</b>	<b>246,522</b>	<b>264,707</b>	<b>264,707</b>	<b>264,207</b>	<b>264,707</b>
General Expense	16,500	16,500	17,500	17,500	16,500	17,500
Maintenance	-	750	750	750	750	750
Travel	4,000	275	300	300	300	300
Out of State Travel	4,500	4,500	5,000	5,000	4,500	5,000
Contracted Services	5,000	5,000	5,000	5,000	3,000	5,000
Equipment	750	-	-	-	-	-
<b>Sub Total: Expenses</b>	<b>30,750</b>	<b>27,025</b>	<b>28,550</b>	<b>28,550</b>	<b>25,050</b>	<b>28,550</b>
<b>Total: Selectmen</b>	<b>288,187</b>	<b>273,547</b>	<b>293,257</b>	<b>293,257</b>	<b>289,257</b>	<b>293,257</b>

## **GENERAL GOVERNMENT: Assistant Town Manager/Personnel Director**

### **MISSION OF THE OFFICE**

To support the Town Manager in the most effective administration of Town government by employing personnel practices and policies which promote and sustain a high performance Town organization through hiring, developing and retaining high caliber employees.

### **DESCRIPTION OF SERVICES**

The Assistant Town Manager/Personnel Director is responsible for personnel, risk and benefit management for over 700 employees and 200 retirees of the Town and the Sudbury Public Schools. Specific responsibilities include:

- Compliance with Labor Laws & Regulations
- Personnel Policies and Procedures
- Classification and Compensation Plans
- Personnel Records and Data
- Employee Insurance Benefits
- Workers' Compensation Administration
- Property and Liability Insurance Administration
- Collective Bargaining
- Recruitment and Hiring
- Training
- Performance Evaluation Programs
- Supervisor Support
- Employee Relations and Communications
- Employee Recognition

### **STAFFING**

Staffing consists of the Assistant Town Manager and a part-time Personnel Assistant/Benefits Coordinator. In addition, a small amount is allocated for limited hours of clerical assistance as needed.

### **FY08 GOALS AND INITIATIVES**

- Finalize the update and revisions to the employee personnel handbook
- Compile an administrative policy handbook containing and updating all the administrative (i.e. non personnel) policies of the Town.
- Insure that the Town is in compliance with GASB reporting requirements on the financial liability created by the Other Post Employment Benefits (OPEB) rule
- Conduct analysis of the Town's alternatives for containing escalating costs of health insurance
- Work with health insurance carriers to insure continued compliance with Medicare D
- Reduce time and improve process for hiring of town employees
- Work with Finance Department to successfully implement the new job pay MUNIS module
- Assume senior level leadership and oversight responsibilities for all departments in the Cultural and Recreational functional areas.

- Develop plans to increase training and professional development opportunities for Town staff to meet both certification requirements and best practices knowledge of staff.
- Participate as part of the Town Manager's Senior Management Team in regular discussions on issues involving multi-departmental collaboration and/or strategic planning.

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Produce for the Town Manager's approval a new personnel handbook
- Review and update Town procedures and options for employees facing long-term illnesses.
- Working with the Police Chief and other town officials, develop a response plan for any hate incidents that may occur in Sudbury
- Develop and oversee a process for recruitment and selection of a new Town Clerk, Town Accountant, Assistant Building Inspector and Office Supervisors for the Town Manager/Board of Selectmen's Office and the Fire Department.
- Complete a classification and compensation study for nonunion positions of employment.
- Oversaw the recruitment, assessment, and selection of a new Assistant Fire Chief, a new Assistant Library Director, office staff within several departmental offices, and a new Teen Center Director.
- Working with the police and fire chiefs, recruited several new police officers and firefighters through entry level examinations or interdepartmental transfers to fill vacancies caused by retirements and transfers. Also recruited new dispatchers in both departments.
- Continued the recently reestablished employee safety committee and worked with the Town's property and liability and worker's compensation insurance carrier to secure the most cost-effective and comprehensive coverage available.
- Updated the Town's health insurance policies and worked with our health care consultant and with representatives of our health insurance carriers to comply with new federal and state mandates.
- Continue with the supervisory training program and expand training opportunities to other Town employee groups, particularly school personnel.
- Arranged for employee wellness initiatives and promoted increased employee awareness of the Town's Employee Assistance Program.
- Continued to work with human resources consultants, professional organizations and colleagues in other municipalities to obtain comparable salary and benefit data and stay current with legal developments relating to personnel and employment law.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Personnel Action Forms Processed</b>	<b>480</b>	<b>304</b>
<b>Employment Applications received</b>	<b>212</b>	<b>227</b>
<b>Positions Filled</b>	<b>37</b>	<b>43</b>
<b>Average applications per vacancy</b>	<b>15</b>	<b>14</b>
<b>Number of employees covered by Town Health Insurance</b>	<b>463</b>	<b>484</b>
<b>Number of retirees covered by Town Health Insurance</b>	<b>230</b>	<b>248</b>



## **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Level Services Budget and Recommended Budget are the same; both include funds for restoration of a part-time shared budget/personnel analyst position to assist the Assistant Town Manager/Personnel Director with all the personnel and benefits management responsibilities he is charged with. This is not a new initiative, because up to FY04, the Town had a part-time personnel position which was eliminated due to budget cuts, and this position has never been restored. This budget restores that position, and changes the nature of the job so that it assists both the Assistant Town Manager/ Personnel Director AND the Finance Director/Treasurer-Collector. Each high level manager would receive about 15 hours per week assistance with analytical tasks. Currently, each of these two managers spend far too much of their time on tasks that could be handled by someone at a lower grade, and higher level tasks get postponed or finished by deadlines but in a hurried manner.

Funds to maintain the same personnel and cover basic, unavoidable expenses of the office are included. The amount requested for office expenses is the same as for FY07. Funds for contractual services are used to hire specialized consultants for assistance with various personnel matters that come up during the year, and for the cost of recruiting and advertising when hiring employees. Funds for professional development are used for this office and for other department heads, supervisors and employees for relevant seminars, workshops and courses.

This budget maintains the austere level for recruiting and training and professional development that has been carried for the last three years. The minimal funding for professional development seriously undermines our commitment to training our supervisory staff and our employees, and the Selectmen's guiding value of protecting and enhancing the professionalism of the town's staff cannot be fully achieved.

NOTE: Although this department does not specifically generate revenue, one of its important responsibilities is to closely monitor all employee benefit and insurance programs to insure that costs and expenditures under these programs are accurate and controlled. Working closely with insurance providers, in excess of \$100,000 has been realized through recoveries and savings.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ASSISTANT TOWN MGR/PERSONNEL</b>						
Assistant Town Manager	81,170	82,388	92,702	92,702	92,702	92,702
Benefits Coordinator	-	31,684	28,778	28,778	28,778	28,778
Budget/Personnel Analyst			17,153	17,153		17,153
Clerical	31,216		4,083	4,083	4,083	4,083
<b>Sub Total: Personal Services</b>	<b>112,386</b>	<b>114,072</b>	<b>142,716</b>	<b>142,716</b>	<b>125,563</b>	<b>142,716</b>
General Expense	2,000	2,000	2,250	2,250	2,000	2,250
Travel	400	400	400	400	400	400
Contracted Services	7,400	4,000	4,000	4,000	4,000	4,000
Employee Profess. Develop.	950	1,950	2,000	2,000	1,950	2,000
<b>Sub Total: Expenses</b>	<b>10,750</b>	<b>8,350</b>	<b>8,650</b>	<b>8,650</b>	<b>8,350</b>	<b>8,650</b>
<b>Total: ATM/Personnel</b>	<b>123,136</b>	<b>122,422</b>	<b>151,366</b>	<b>151,366</b>	<b>133,913</b>	<b>151,366</b>

**MISSION OF THE OFFICE**

To support the Board of Selectmen, the Town Manager and the Town's departments and committees by providing legal advice and activities which sustain a Town organization that always acts ethically and professionally and avoids unnecessary and costly consequences.

**DESCRIPTION OF SERVICES**

The Town Counsel's office performs an intermediary function by providing legal opinions upon request from Town Departments. These requests involve issues such as conflicts of interest, interpretation and understanding of various rules, regulations, procedures, and state law and statutes in connection with town programs and projects. The Town Counsel's office also provides legal review and drafting services for town acts, articles and bylaws, contracts and lease agreements, as well as the preparation of documents and filing, and representing the Town in all court actions.

**STAFFING**

Personnel under this budget include a part-time Town Counsel, who is a contracted employee to the Town, a part-time legal assistant and one part-time clerk, who are employees of the town, and "job-share" this position, neither requiring benefits. The Town Counsel is appointed by the Board of Selectmen, but supervised by the Town Manager. Other office staff is appointed by the Town Manager.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

It is difficult to anticipate litigation matters. The anticipated costs of hourly legal representation above and beyond the Town Counsel's retainer will probably be greater than this budget allows for. Litigation to defend the decisions of the various boards can be expensive and difficult to predict. And we anticipate that the Selectmen's intention to continue to protect the best interests of Sudbury in the matter of the Marlboro Easterly Wastewater Treatment Plan permitting will continue into FY08. The Board of Selectmen will seek a reserve fund transfer to supplement this budget if any of potentially costly legal matters cannot be resolved within the budget. Additionally collective bargaining is a time consuming process that involves detailed knowledge of labor law at both the federal and state level, and specialized counsel is invaluable for these efforts.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>LAW</b>						
Town Counsel	39,423	40,014	41,214	41,214	41,214	41,214
Clerical	35,728	36,264	37,352	37,352	37,352	37,352
<b>Sub Total: Personal Services</b>	<b>75,151</b>	<b>76,278</b>	<b>78,566</b>	<b>78,566</b>	<b>78,566</b>	<b>78,566</b>
General Expense	5,700	5,890	5,975	5,975	5,975	5,975
Legal Expense	74,843	80,418	80,418	80,418	80,418	80,418
<b>Sub Total: Expenses</b>	<b>80,543</b>	<b>86,308</b>	<b>86,393</b>	<b>86,393</b>	<b>86,393</b>	<b>86,393</b>
<b>Total: Law</b>	<b>155,694</b>	<b>162,586</b>	<b>164,959</b>	<b>164,959</b>	<b>164,959</b>	<b>164,959</b>

**GENERAL GOVERNMENT: Finance Department - Finance Committee**

**MISSION OF THE COMMITTEE**

The Mission of the Finance Committee is to advise Town Meeting on all budgetary and financial matters that come before Town Meeting, and to consider requests from the Town Manager for allocations from the Reserve Fund.

**DESCRIPTION OF SERVICES**

The Finance Committee is comprised of nine members appointed by the Town Moderator. Approximately nine months before the April Annual Town Meeting, the FinCom issues guidelines for development of the operating budget requests from the various cost centers, based upon revenue expectations and information needs of the FinCom. During the year, members of the FinCom serve as liaisons to the cost centers and attend monthly planning meetings with them. During January and early February of each year, the FinCom conducts detailed budget hearings, leading to a recommended budget that is balanced within the limits of Proposition 2 ½. The Finance Committee may also recommend a budget that exceeds these limits, requiring a Proposition 2 ½ override question be placed on a ballot at the annual or a special election if approved by the Board of Selectmen and Town Meeting

The Reserve Fund is considered part of the budget that is allocated to the Town Operating Departments and provides the Town with the flexibility to address unexpected or emergency costs that arise during the fiscal year.

**STAFFING**

The only staff for this committee is a part-time recording secretary.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>FINANCE COMMITTEE</b>						
Clerical	1,585	1,609	1,657	1,657	1,657	1,657
<b>Sub Total: Personal Services</b>	<b>1,585</b>	<b>1,609</b>	<b>1,657</b>	<b>1,657</b>	<b>1,657</b>	<b>1,657</b>
General Expense	250	350	350	350	350	350
<b>Sub Total: Expenses</b>	<b>250</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>350</b>
<b>Total: Finance Committee</b>	<b>1,835</b>	<b>1,959</b>	<b>2,007</b>	<b>2,007</b>	<b>2,007</b>	<b>2,007</b>

**MISSION OF THE OFFICE**

The Mission of the Town Accountant's Office is to protect the Town's financial interests and ensure that Town resources are expended and received according to local bylaws, General Laws of the Commonwealth and sound accounting practices. Charged with maintaining and examining all financial records, the Accounting Office provides Town officials and the public accurate information to facilitate the effective management of the Town.

**DESCRIPTION OF SERVICES**

The Town Accountant's Office maintains all the financial records for the Town. Payroll for all town and school employees and accounts payable for all departments are processed through this office. In processing these transactions, the Town Accountant by statute, examines and approves all financial transactions verifying compliance with local and state law, establishes procedures and implements sound business practices and maintains a general ledger. The office monitors all budgets and provides a monthly budget statement to all departments and boards. It also is responsible for maintenance of the financial software used by the Town, and the filing of all reports to the Department of Revenue and various governmental agencies.

**STAFFING**

The Accounting division of the Finance Department consists of the Town Accountant, the Assistant Town Accountant and two clerical positions.

**FY08 GOALS AND INITIATIVES**

- Address all outstanding issues from Annual Audit for period ending June 30, 2007 and finalize the requirements of GASB 34 by bringing Infrastructure on to the Financial Statements
- Oversee more use of current MUNIS accounts payable functionality, including decentralizing entry of vendor bills by selected departments
- Oversee more use of current MUNIS general billing functionality by tracking miscellaneous billing such as "paid detail" and COBRA collections
- Oversee training and use of MUNIS payroll module for tracking compensated leave
- Prepare for the implementation of GASB 45 by recognizing post-employment benefits

**FY07 MAJOR INITIATIVES**

- Implement the new MUNIS payroll/personnel module, an approved capital project of the 2006 Town Meeting
- Work with the Treasurer/Collector office on implementation of the new MUNIS tax billing and collection software, an approved capital project of the 2006 Town Meeting

**FY06 MAJOR ACCOMPLISHMENTS**

- Completed change of access to Treasurer's vault room and related office renovations

- Increased the use of the current MUNIS Budget module functionality by working with the Town Manager to use module during budget preparation
- When the Town Accountant was also the Finance Director, accomplished the following:
  - o Streamlined forms used for information gathering from departments in preparation of FY07 budget
  - o Prepared report and analysis for FY06 Financial Summit, including updating Financial Trend Monitoring Report of Town's Financial Condition
  - o Provided staff support to the Finance Committee and Town Manager for preparation of the FY07 budget
  - o Provided staff support to the Capital Improvement Planning Committee for preparation of the FY07 capital budget

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>	<b>% Change</b>
<b>Invoices Paid</b>	<b>15,430</b>	<b>16,023</b>	<b>3.7%</b>
<b>Payroll Checks Processed</b>	<b>17,525</b>	<b>18,237</b>	<b>3.9%</b>
<b>W-2's Processed</b>	<b>1,009</b>	<b>1,023</b>	<b>1.4%</b>
<b>Total General Fund Dollars Expended</b>	<b>\$62,840,260</b>	<b>\$68,606,163</b>	<b>8.4%</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

The Town Accountant is no longer the Finance Director. With the retirement of the prior Town Accountant, it is now the Treasurer-Collector who is doing double duty as the Finance Director. The Level Services Budget for FY08 takes into consideration the cost of the contract for audit services has increased by \$7,000 and computer support has increased by \$4,000.

This is a critical budget. The financial recordkeeping and payroll responsibilities of this office, with all the state and federal mandates that must be complied with, mean that increasing costs in this budget must be funded, and offsetting cuts identified elsewhere. The Town Manager's Recommended Budget is as lean as can safely be crafted without the risk of unacceptable costly errors and penalties. And it should be noted this office provides required services to both the Sudbury Public Schools as well as the Town departments. Actually, in terms of percentage of payroll processed, vouchers processed, tax filings, retirement board contributions, voluntary deductions remitted to various vendors, etc. the larger percentage of activities of this office is attributable to meeting the financial needs of the Sudbury Public Schools and their employees.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ACCOUNTING</b>						
Town Accountant	82,426	73,215	62,089	62,089	62,089	62,089
Asst to FD Stipend	2,500	327	-	-	-	-
Clerical	123,785	128,424	119,038	119,038	119,038	119,038
Sick Leave Buy Back	3,096	3,218	1,511	1,511	1,511	1,511
Overtime	1,061	1,077	2,060	2,060	2,060	2,060
<b>Sub Total: Personal Services</b>	<b>212,868</b>	<b>206,261</b>	<b>184,698</b>	<b>184,698</b>	<b>184,698</b>	<b>184,698</b>
General Expense	7,900	7,900	7,900	7,900	7,500	7,900
Computer	21,000	21,000	25,202	25,202	25,202	25,202
Maintenance	2,020	2,020	2,400	2,400	2,400	2,400
Travel	1,250	1,475	1,700	1,700	1,600	1,700
Contracted Services	31,500	33,000	40,000	40,000	40,000	40,000
<b>Sub Total: Expenses</b>	<b>63,670</b>	<b>65,395</b>	<b>77,202</b>	<b>77,202</b>	<b>76,702</b>	<b>77,202</b>
<b>Total: Accounting</b>	<b>276,538</b>	<b>271,656</b>	<b>261,900</b>	<b>261,900</b>	<b>261,400</b>	<b>261,900</b>



### **MISSION OF THE OFFICE**

To ensure an equitable share of the tax burden to all taxable real and personal property entities, by regular review and analysis.

### **DESCRIPTION OF SERVICES**

The Assessors Office is responsible for assessing property taxes, the major revenue source for the town. To accomplish this all real and personal property is valued as of January 1st of each year. The valuations are used to fairly allocate the taxes necessary to fund the Town's annual budget. We calculate the annual new growth increase in the levy limit. New growth is an additional amount based on the assessed value of new construction and other growth in the tax base not related to any revaluation program. The Assessors' set the annual tax levy and rate(s) for the year. We prepare the annual tax roll, and commit the list to the Tax Collector with a warrant to collect the taxes. We administer the tax exemption/deferral program and act on abatement and exemption applications, including the Community Preservation Surcharge exemptions. A reserve fund is allocated annually (Overlay Account) to fund anticipated property tax abatements and exemptions. We are responsible for assessing and administer excise taxes. In keeping with the "Financial Team Approach" of service, to share information and resources the Assessing Department provides data reports to numerous Town Departments.

### **STAFFING**

The personnel in this office include the Director of Assessing, an Assistant Assessor, one full-time clerical position and one full time and one part-time data collectors. All staff in this office is appointed by the Town Manager.

### **FY08 GOALS AND INITIATIVES**

- Analysis and if warranted, revaluation of all residential, commercial, industrial properties, vacant and improved, special use, i.e. Chapter discounts, Personal Property and Mixed Use.
- Commence new 10 year re-inspection program.
- Maintain personal exemption programs;
- Inspect and value Chapter 203 accounts.
- Inspection and valuation of major new condominium complexes (over 100).

### **FY 07 MAJOR INITIATIVES AND FY06 ACCOMPLISHMENTS**

- Complete full revaluation of all residential, commercial, industrial properties, vacant and improved, special use, i.e. Chapter discounts, Personal Property and Mixed Use.
- Finalize the 10 year re-inspection program.
- Implement and maintain personal exemption programs;
- Produced local cable TV program explaining exemption programs,
- Inspect and value Chapter 203 accounts.
- Redefine parcel-id's for engineering and GIS

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY05	FY06	% Change
Real & Personal Property values maintained	6,721	6,840	1.8%
Property re-inspections completed	553	619	11.9%
Permits, valued, measured and listed	355	565	59.2%
Excise committed and maintained	17,722	17,911	1.1%
All Exemptions/Deferrals Processed	535	561	4.8%
Revaluation Performed	Full	Full	

## BUDGET ISSUES

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

This budget must be retained as any reductions could have a significant impact on the ability of the Town to issue timely and correct tax bills. And it is critical for all cost centers that the Town issue all tax bills on time, so that the Town's cash flow is not jeopardized at any time. The State requires assessing offices to periodically inspect all real properties over a ten year period. The inspections are conducted on a cyclical basis, and are ongoing. Furthermore, the Assessors are mandated to review and update values annually. Associated costs include the production of a myriad of analytical reports, discovery of all business personal property accounts, field review of all properties, inspection of sold properties, production of 6,800+ new property cards, and all other related requirements.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ASSESSORS</b>						
Assessor	70,838	72,427	72,777	72,777	72,777	72,777
Clerical	139,392	144,506	150,924	150,924	150,924	150,924
Stipend	-	1,000	1,000	1,000	1,000	1,000
Sick Buy Back	1,113	1,130	1,164	1,164	1,164	1,164
<b>Sub Total: Personal Services</b>	<b>211,343</b>	<b>219,063</b>	<b>225,865</b>	<b>225,865</b>	<b>225,865</b>	<b>225,865</b>
General Expense	11,750	11,750	11,750	11,750	11,750	11,750
Tuition	1,500	1,000	1,000	1,000	1,000	1,000
Contracted Services	20,000	20,000	20,000	20,000	20,000	20,000
<b>Sub Total: Expenses</b>	<b>33,250</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>
<b>Total: Assessor</b>	<b>244,593</b>	<b>251,813</b>	<b>258,615</b>	<b>258,615</b>	<b>258,615</b>	<b>258,615</b>

**MISSION OF THE OFFICE**

To provide collection, deposit, investment and financial reporting for all funds due to the Town in an efficient and effective manner. To provide all financial custodial services for the Town in compliance with all State and local regulations; in a manner that best meets the needs of the individual taxpayer and the community, as a whole.

**DESCRIPTION OF SERVICES**

The Treasurer/Collector office issues over 35,000 bills each fiscal year, including real estate and personal property taxes (quarterly), and motor vehicle excise tax (annually). The office pursues timely collection of all bills and maintains a collection rate of nearly 99% of all property tax bills. The Treasurer/Collector establishes and maintains Tax Title accounts on all significantly delinquent real estate tax accounts. In the area of Treasury management, the Treasurer's office is responsible for the receipt, investment and disbursement of all town funds. Staff manages all town bank accounts, conducts both short term and long term borrowing for the Town and invests all available funds to produce investment income. The Treasurer is a Trustee of Town Trusts, and invests and reports on all Trust Fund Activities. The Investment Advisory Committee assists in recommending investment priorities for the Trust funds.

The Treasurer-Collector also serves as the Town's Finance Director/Budget Director. As such, she prepares the Town's annual operating budget and the financial section of the Annual Warrant, the Town's Annual Capital Budget and Five Year Capital Improvement Plan, and conducts all analysis and documentation for the Town's Annual Financial Summit. She receives no assigned staff assistance with all these additional responsibilities.

**STAFFING**

For FY08, the department includes the Treasurer/Collector, the Assistant Treasurer/Collector, 2 full-time clerks and a ½ time clerical position. Additionally, some clerical hours are provided by a senior who is earning a reduction in her property tax bills through the Town's Tax Work-Off Program. The Treasurer/Collector serves as the Town's Finance Director.

**FY08 GOALS AND INITIATIVES**

- Complete all tax bill cycles within new software system.
- Obtain new lockbox vendor; consider new online tax payment system(s), for taxpayer convenience.
- Maintain tax title receivables below \$500,000 or less than 1% of the current year's gross tax levy.
- Finish reconciling application escrow accounts; identify and release excess escrow income to general funds use.

**FY06/07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Will complete implementation of new tax software system to fully-integrated MUNIS base modules. Live date May 07.
- Completed Low-Value Land Petition for the DOR. Town stands to foreclose/claim 29 odd parcels, some of which may be sold at public auction to recoup lost tax revenues dating back as far as the mid-1970's.

- Have initiated several larger value foreclosure proceedings in Land Court. The Town anticipates collecting on all foreclosure cases by default or payment in full.
- Took necessary steps to release some tailings to general funds in October 2006 in upwards of \$40,000. Also reduced the number of recent tailings significantly through active search/reconciliation.
- Completed reconciling performance bond escrow accounts; plans to release more than \$60,000 in excess/defaulted escrow income to general funds this year.

**PERFORMANCE/WORKLOAD INDICATORS**

Generally speaking, since all taxes levied must be collected measurement goals revolve around time outstanding/cycle. Shortening the collection cycle improves the likelihood of collection, cash flow and accuracy in budgeting/forecasting.

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Average elapse time to tax title</b>	<b>3 months</b>	<b>&lt;3 months</b>
<b>Delinquent tax balance over \$10K</b>	<b>14 parcels</b>	<b>11 parcels</b>
<b>Tax titles outstanding</b>	<b>124 parcels</b>	<b>70 parcels</b>
<b>Remaining bills turned over to Deputy for collection</b>	<b>749</b>	<b>705</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None for this office

The Town Manager’s Level Services Budget and Recommended Budget are the same; both include funds for creation of a part-time shared budget/personnel analyst position to assist the Assistant Town Manager/Personnel Director with all the personnel and benefits management responsibilities he is charged with. This is not a new initiative, because up to FY04, the Town had a part-time personnel position which was eliminated due to budget cuts, and this position has never been restored. This budget restores that position, and changes the nature of the job so that it assists both the Assistant Town Manager/ Personnel Director AND the Finance Director/Treasurer-Collector. Each high level manager would receive about 15 hours per week assistance with analytical tasks. Currently, each of these two managers spend far too much of their time on tasks that could be handled by someone at a lower grade, and higher level tasks get postponed or finished by deadlines but in a hurried manner.

The Town Manager’s Recommended Budget and Level Services Budget contain funds to maintain the basic, unavoidable expenses of the office, and step increases for the staff, most of who have worked for this department for less than three years and thus are on the lower steps of their respective pay grids, and a small increase in the travel line. Both the Treasurer/Collector and Assistant Treasurer/Collector need to attend courses to obtain their certification and this account was underfunded in the FY07. The addition of \$2,500 has been made in FY08 to reflect the shift in duties of Finance Director from Accounting to the Treasurer/Collector’s office. Approximately \$5K has been cut in operating expenses in FY08 to reflect lower tax collection costs, office supplies and general equipment costs.

This office collects all payments and maintains all bank accounts. Any reductions in staff or shortcuts to procedures that insure the timeliness and safeguarding of Town funds

would only reduce the revenue available to the Town as a consequence by lessening opportunities for investment income.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TREASURER/COLLECTOR</b>						
Fin. Director/Treasurer-Collector	60,038	77,496	86,654	86,654	86,654	86,654
Clerical	118,760	121,267	129,968	129,968	129,968	129,968
Budget/Personnel Analyst			17,153	17,153	-	17,153
Stipends	-	2,173	2,500	2,500	2,500	2,500
<b>Sub Total: Personal Services</b>	<b>178,798</b>	<b>200,936</b>	<b>236,275</b>	<b>236,275</b>	<b>219,122</b>	<b>236,275</b>
General Expense	24,500	24,050	12,425	12,425	12,425	12,425
Maintenance	8,750	8,750	8,750	8,750	8,750	8,750
Travel	750	1,200	1,500	1,500	1,500	1,500
Tax Collection	10,000	10,000	20,000	20,000	20,000	20,000
Tax Title Expense	-	3,500	-	-	-	-
<b>Sub Total: Expenses</b>	<b>44,000</b>	<b>47,500</b>	<b>42,675</b>	<b>42,675</b>	<b>42,675</b>	<b>42,675</b>
<b>Total: Treasurer-Collector</b>	<b>222,798</b>	<b>248,436</b>	<b>278,950</b>	<b>278,950</b>	<b>261,797</b>	<b>278,950</b>

**MISSION OF THE OFFICE**

The mission of the Information Systems Office is to increase productivity by streamlining the flow of information through the Town's internal and external network, and providing technical support and training to all Town offices.

**DESCRIPTION OF SERVICES**

The information systems division of the Finance Department is responsible for purchasing, implementing, administering, and maintaining the Town's Microsoft 2003 Active Directory network infrastructure, which includes all network and wireless connectivity, users, servers, computers, software, backup and security. All of the Town's Telecommunications are managed by the IT Department, including: all telephone systems, email, cellular technology, fax operations, pagers and cable television. The IT Department provides computer training, software support, system maintenance and repairs. The software support includes all major data systems, linking the various data stores within the Town network. Examples of some of these applications are the tax collection, accounting, and assessing software used by the Finance Department, the Police dispatch and incident tracking system, as well as the development of Sudbury's GIS program.

The expansion and management of the Town Website is an integral component of the IT Department. The dissemination and posting of information is essential in providing current news, documents and other matters of public interest, in a timely convenient fashion, thus lessening the need to contact departments directly. The department is also responsible for the management of the Town's electronic documents, providing the capability to archive documents securely while offering efficient access when needed. The IT Department added VPN's (virtual private networks) which provide staff and software vendor's access to the Town's network from offsite locations, expanding the work environment outside the confines of the office.

**STAFFING**

Staff in the Information Systems Office includes the Technology Director and a Technology Assistant, with some summer help and a consultant to work on the Town's website.

**FY08 GOALS AND INITIATIVES**

- Distribute new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Upgrade computer software on all computers to latest versions available (ongoing)
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Continue to update the Town Website adding new features and capabilities (ongoing)
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Upgrade Patriot Properties Assessing Software to an SQL 2005 compatible version moving it from Server06 to new ServerSQL. All client software must be upgraded and reconfigured to connect to the new server
- Upgrade the Local Area Network (LAN) at the Fire Station by adding new Gigabit core switch. Establishing VLANs on the network which will segment network traffic thus

- improving the overall network performance. The Fiber WAN connection from the Fire to the Flynn building will also be upgrade to Gigabit speed.
- Replaced email server (Exchange) and upgraded email software to Exchange 2007 on the new server.
  - Establish telecom gateways connecting existing phone systems at the Police and the DPW buildings to our newly established VOIP network. This will allow extension dialing between DPW, Police, Fairbank and the Flynn building, thus utilizing the data network for intra-building calling and reducing the need for Centrex lines.
  - Work with the GIS Administrator / GIS Consultant to implement the FY08 initiatives in Sudbury's GIS plan.
  - Establish network connection at the Parks and Ground department using the existing Fire Alarm wire. The 10 Mb network connections would be established with a SHDSL modem at Park and Grounds and at the Town Hall.
  - Deploy and implement Secure wireless private access points for Town Staff at the Fire Station.
  - Add centralized management capabilities to our Wireless network. Segment Access Points so that secure Public and Private wireless access can coexist within the same access points.

#### **FY07 GOALS AND INITIATIVES**

- Distribute new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Upgrade computer software on all computers to latest versions available (ongoing)
- Keep troubleshooting records which will be incorporated into the Town Intranet as part of a computer help desk.
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Continue to update the Town Website adding new features and capabilities (ongoing)
- Gather information from our software vendors about adding Online Transaction capability to our website and then implement the solution.
- Gather Information about URL Filtering options, which would allow the Town to manage employee internet access. Creating reports which analyze how employees are using the Internet and identify activity that is degrading network performance. Should provide reports such as daily/weekly/monthly/yearly traffic, most blocked URLs, most active users, and individual use.
- Upgrade Filemaker Pro Server to 8.0 moving it from Server06 to the new ServerSQL. Requires that all databases be converted to the new version and the client software be upgraded to 8.0.
- Upgrade Patriot Properties Assessing Software from SQL 7.0 to SQL 2000 reconfiguring the databases and software on Server 06.. All client software must be upgraded and reconfigured to connect to Server06 running SQL 2000
- Upgrade Sudbury Historical Archives to new SQL content version and move the database from Server06 to new ServerSQL. Clients at the Goodnow Library and IT departments will need their software upgraded and reconfigured.
- Implement a VOIP (Voice-Over-Internet-Protocol) telephone system in both the Flynn and Fairbank buildings.
- Implement an archiving software system at the Police, Assessing and Town Clerk departments which scans, stores and retrieves departments paper and electronic documents from a centralize database server.
- Purchase and implement an enterprise-wide permitting software solution to be utilized by any department or committee responsible for the issuing of permits or licenses.

- Upgrade the Local Area Network (LAN) at the DPW by adding new Gigabit core switch. Establishing VLANs on the network which will segment network traffic thus improving the overall network performance. The Fiber WAN connection from the DPW to the Flynn building will also be upgrade to Gigabit speed.
- Gather information about the offsite data collection needs of each department.
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Implement public and vendor internet access in the town buildings through the cable modem located at the library
- Replace Webshield e250 gateway content filtering server with McAfee Secure Internet Gateway 3200 appliance. New equipment scans web and email traffic for Viruses and SPAM
- Replace Elron Windows NT Firewall and Cisco PIX 501 VPN/Firewall security appliance with a Cisco ASA5520 security appliance. Replicate Elron Firewall and Cisco PIX 501 configurations onto the ASA5520 device. Establish new external internet IP's for Email, Tax, VPN, DNS and Filemaker and reconfigure external Primary and Secondary DNS servers to match new IP schemes.
- Created Filemaker Database to track people who have medical conditions and/or special circumstances which require that they be called to check on their well being. The Emergency Call List database will be shared through Filemaker 8.0 Server and accessed by the Police, Fire and Senior Center. The information will be entered by Senior Center staff and the Fire and Police will use it to lookup emergency information such as relatives, friends, neighbors, Primary Doctors, Medical Conditions and Special Circumstances. Police/Fire will also be able to enter emergency incidents into the person's data file.
- Implement web component module of the Patriot Properties Assessing software.
- Build a main GIS data depository in Personal Geodatabase format for town wide data sharing (with all MassGIS layers and existing GIS layers maintained by the Engineering)
- Work with the GIS Consultant to implement the FY07 initiatives in Sudbury's GIS plan.

#### **FY05/FY06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Upgraded all Windows NT 4.0 servers to Windows 2000 / 2003 and implemented Active Directory services on the Town's data network.
- Distributed new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Created Filemaker Database to track Fire Department Residential Burning Permits. Residents have the ability to go website to register on a day they plan to burn. They can also call in to an automated line in which they can enter their permit number and register to burn. Both of these methods integrate with the permit database, sending the data to the server and updating the residential record.
- Replaced SQL Server (Server06) and upgraded our database software to SQL 2005.
- Upgraded Website database to SQL 2005 and move it from Server06 to ServerSQL.
- Upgraded computer software on all computers to latest versions available (ongoing)
- Replaced email server (Server02) and upgraded email software to Exchange 2003 on new server.
- Replaced PAMET NT Server (PAMET) with new Windows 2003 server with SQL 2000 installed. Upgraded the PAMET Police databases to SQL 2000 then transferred data to new server and reconfigured client software.
- Added RBL (Realtime Blackhole List) service to Webshield e250 to block known SPAM IP's and domains.



- Added spam and virus filtering to our internet gateway by adding a McAfee E250 Web filtering appliance and also installed McAfee Exchange Group Shield Antivirus software on our email server.
- Purchase an archiving software system at the Police, Assessing and Town Clerk departments which scans, stores and retrieves departments paper and electronic documents from a centralize database server.
- Purchase a VOIP (Voice-Over-Internet-Protocol) telephone system in both the Flynn and Fairbank buildings.
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Developed and implemented Marriage Licensing database for the Town Clerk.
- Added redundant internet connections to the Town's Network by installing and configuring Radware LinkProof device. This device load balances our client internet connections utilizing all three available internet sources (School T1 line; Minuteman T1 Line; and Library Cable Modem). If an internet line goes down the clients are redirected to the remaining functioning internet connections thus eliminating downtime.
- Implemented wireless networking in the library for patrons who want to bring laptops into the library and utilize the library's internet connection.
- Added a new generator to the Flynn Building which will power all networking and telecommunications equipment during a power failure
- Work together with GIS Consultant to create a comprehensive 5-year GIS Implementation Plan for the town.
- Secure wireless private access points installed and implemented for Town Staff in the Flynn, Town Hall, Library, DPW and Fairbank buildings
- Continue to update the Town Website adding new features and capabilities (ongoing)

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY04	FY05	FY06
<b>Staff Computers</b>	<b>194</b>	<b>221</b>	<b>221</b>
<b>Computer User Accounts</b>	<b>199</b>	<b>219</b>	<b>229</b>
<b>Email Accounts / Email Distribution Groups</b>	<b>338 / 66</b>	<b>1018 / 119</b>	<b>1551/112</b>
<b>New Hires - Town</b>	<b>94</b>	<b>87</b>	<b>64</b>
<b>VPN Users</b>	<b>7</b>	<b>24</b>	<b>31</b>
<b>Total Website Hits Per Year</b>	<b>1,710,564</b>	<b>2,763,486</b>	<b>4,127,667</b>

## BUDGET ISSUES

New Budget Initiatives for FY08 The Town Manager's Recommended Budget has two new initiatives for FY08. First, money is allocated for the purchase of CISCO SmartNET 8x5xNBD maintenance contracts on the Town's mission critical switches, routers and firewall. The Town does not have backup equipment it can use in the event of failure. The SmartNET will give the town the ability to quickly replace the defective equipment. Second, the Recommended Budget includes funds for the hiring of a GIS Administrator. The Town has been preparing for roll out of GIS for several years, but it is essential if we are to achieve Sudbury's goal of establishing an integrated, easy to use, multi-departmental enterprise GIS

system, that a new position be created to assist with the development and implementation of the GIS Town wide system.

Otherwise, the Town Manager Recommended Budget and Level Services Budget are the same. Both include funds to maintain the same personnel and basic expenses of keeping up with a large inventory of hardware and software to support numerous Town departments.

This department has become critical to the continued operation of all other departments and missions of the Town and cuts to the Town Manager's Recommended Budget should be avoided. This department is struggling with an increasing workload and has no real clerical support.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>INFORMATION SYSTEMS</b>						
Technology Administrator	73,464	75,116	75,316	75,316	75,316	75,316
Non-clerical	44,403	54,021	58,036	58,036	58,036	58,036
GIS Administrator	-	-	-	56,709	-	56,709
Sick Leave Buy Back	1,714	1,727	1,731	1,731	1,731	1,731
Summer Help	7,510	10,016	10,724	10,724	10,724	10,724
<b>Sub Total: Personal Services</b>	<b>127,091</b>	<b>140,880</b>	<b>145,808</b>	<b>202,516</b>	<b>145,808</b>	<b>202,516</b>
General Expense	5,000	5,000	5,000	5,000	5,000	5,000
Software	35,045	40,045	42,845	42,845	42,845	42,845
Maintenance	10,000	10,000	10,000	10,000	10,000	10,000
Travel	1,000	1,100	1,100	1,100	1,100	1,100
Contracted Services	18,400	18,400	19,100	24,600	19,100	24,600
Equipment	50,000	50,000	50,000	50,000	50,000	50,000
Professional Development	4,350	4,350	4,350	4,350	4,350	4,350
WAN/Telephone Connections	11,500	11,500	11,500	11,500	11,500	11,500
Network	5,000	5,000	5,000	5,000	5,000	5,000
Internet	10,000	10,000	10,000	10,000	10,000	10,000
<b>Sub Total: Expenses</b>	<b>150,295</b>	<b>155,395</b>	<b>158,895</b>	<b>164,395</b>	<b>158,895</b>	<b>164,395</b>
<b>Total: Information Systems</b>	<b>277,386</b>	<b>296,275</b>	<b>304,703</b>	<b>366,911</b>	<b>304,703</b>	<b>366,911</b>

**GENERAL GOVERNMENT: Committee for Preservation of Town Documents**

**MISSION OF THE OFFICE**

This committee was created to insure that documents are properly archived and preserved.

**DESCRIPTION OF SERVICES**

The Committee for the Preservation of Town Documents is responsible for preserving and microfilming current and ancient Town documents.

**STAFFING**

There is no staff associated with this budget, as the committee has successfully relied on volunteers within the committee for handling work needs. The Town Clerk's office also works with this committee as needed.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

This budget has been increased by \$250, due to the increased cost of archiving town documents.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>COMMITTEE FOR PRESERVATION AND MANAGEMENT OF DOCUMENTS</b>						
General Expenses	1,000	1,500	1,750	1,750	1,600	1,750
<b>Sub Total: Expenses</b>	<b>1,000</b>	<b>1,500</b>	<b>1,750</b>	<b>1,750</b>	<b>1,600</b>	<b>1,750</b>
<b>Total: Doc. Preservation</b>	<b>1,000</b>	<b>1,500</b>	<b>1,750</b>	<b>1,750</b>	<b>1,600</b>	<b>1,750</b>

## **GENERAL GOVERNMENT: Town Clerk and Registrars**

### **MISSION OF THE OFFICE**

The mission of the Town Clerk's Office is to safeguard the vital records and elections process of the Town through the use of professional administrative practices, in order to preserve the Town's vital and historical records and the integrity in elections.

### **DESCRIPTION OF SERVICES**

State law provides that the Town Clerk is the official keeper of the Town Seal and the Town's Oath Book. The Town Clerk oversees and ensures all statutory and by-law required functions are correctly and efficiently performed. In conjunction with the Board of Selectmen's Administrative Assistant, Town Moderator and Town Counsel the Town Clerk insures well run Town Meetings and submits general bylaw and zoning bylaw amendments at the close of Town Meeting to the Attorney General for approval. She records and certifies all official actions of the Town, including Town Meeting legislation and appropriations, Planning, Zoning Board and Board of Appeals decisions and signs all notes for borrowing. The Town Clerk serves as chief election official; oversees polling places, election officers, and the general conduct of all elections; directs preparation of ballots, polling places, voting equipment, voting lists, administers campaign finance laws, certifies nomination papers and initiative petitions and serves on the local Board of Registrars. The Town Clerk's Office conducts the annual town census, prepares the street list of residents and furnishes the jury list to the Office of the Jury Commissioner. The Town Clerk and some members of her staff also are Notaries Public and have the authority to notarize documents signed in their presence. The Town Clerk serves as the custodian of Town records and official documents. She is responsible for the maintenance, preservation and disposition of all Town records. She is required by State Law to ensure that Town records are readily available for public inspection.

### **STAFFING**

Staffing includes a Town Clerk, an Assistant Town Clerk, one full-time Census and Documentation Coordinator, and two part-time clerical positions. The Town Clerk, along with the Board of Registrars, oversees all elections held in Sudbury, and her office includes the salaries for part-time poll workers and police details associated with elections.

### **FY08 GOALS AND INITIATIVES**

- Continue to implement Help America Vote Act
- Run flawless elections; train 75 election workers up to speed regarding HAVA and new elections procedures.
- To work with IT to implement the Electronic Unified Archiving Solution software that will manage Town's documents and records, to provide the ability to archive documents securely, while providing efficient access
- Town Clerk will attend conservation and preservation of documents workshops
- Work with the Community Preservation Committee to request monies regarding preserving old vital records, documents and ledgers.
- To inventory basement storage of records that have not been inventoried and indexed.
- Continue to make the Town Clerk website even more user-friendly and provide additional information and links to services and voting procedures.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continued to more fully utilize the storage area in the Town Hall to house old records.

- Expanded computerized office procedures for future reference and ease of processing.
- Implemented cost saving renovations that extended the function of current filing cabinets and storage instead of purchasing new equipment at significant savings to the Town.
- Expanded the information available on the Town Clerk website and improved accessibility to information and documents.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Certified Vital Records and Burial Permit Issued:</b>	<b>1,352</b>	<b>1,242</b>
<b>Business Certificates Issued</b>	<b>175</b>	<b>154</b>
<b>Generated and Mailed Yearly Census</b>	<b>6,062</b>	<b>6,110</b>
<b>Returned and processed</b>	<b>90.25%</b>	<b>95.70%</b>
<b>Number of processed new registered voters</b>	<b>877</b>	<b>541</b>
<b>Official Voter Population</b>	<b>11,028</b>	<b>10,891</b>
<b>Official Population</b>	<b>18,107</b>	<b>18,207</b>
<b>Registered Dogs</b>	<b>2,055</b>	<b>2,098</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses. An additional amount has been included for tuition and travel due to additional course requirements for certification for the Town Clerk. This budget will be adequate if no more than four elections take place in FY08 allowing for a special election if necessary.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN CLERK &amp; REGISTRARS</b>						
Town Clerk	59,139	60,465	51,673	51,673	51,673	51,673
Overtime	800	1,000	1,000	1,000	1,000	1,000
Clerical	116,631	115,576	123,813	123,813	123,813	123,813
Election Workers	8,000	14,000	14,000	14,000	14,000	14,000
Registrars	956	956	956	956	956	956
<b>Sub Total: Personal Services</b>	<b>185,526</b>	<b>191,997</b>	<b>191,442</b>	<b>191,442</b>	<b>191,442</b>	<b>191,442</b>
General Expense	12,180	12,363	12,548	12,548	12,548	12,548
Computer	1,750	1,750	1,750	1,750	1,750	1,750
Maintenance	200	200	200	200	200	200
Travel	670	670	750	750	750	750
Tuition	700	700	1,500	1,500	1,500	1,500
Elections	8,000	14,000	14,000	14,000	14,000	14,000
Equipment	1,500	1,500	1,500	1,500	1,500	1,500
<b>Sub Total: Expenses</b>	<b>25,000</b>	<b>31,183</b>	<b>32,248</b>	<b>32,248</b>	<b>32,248</b>	<b>32,248</b>
<b>Total: Town Clerk &amp; Registrars</b>	<b>210,526</b>	<b>223,180</b>	<b>223,690</b>	<b>223,690</b>	<b>223,690</b>	<b>223,690</b>

## **GENERAL GOVERNMENT: Conservation**

### **MISSION OF THE OFFICE**

The Sudbury Conservation Commission was established in 1962 to protect local natural resources and features and to act as stewards of the Town's conservation properties. One of the Conservation Commission's most important responsibilities is protecting the ecological integrity of Sudbury's wetlands and the surrounding landscape

### **DESCRIPTION OF SERVICES**

The Commission is responsible for implementing and enforcing the Massachusetts Wetlands Protection Act and the Sudbury Wetlands Administration Bylaw. The Conservation Commission manages the Town's nine conservation lands for public enjoyment. These properties and the Sudbury River offer many opportunities for outdoor recreation. One major goal is to increase public awareness and appreciation of the many ways in which our local plants, wildlife, and natural landscape add to the quality of life in our community. As part of educational efforts the Conservation Commission leads public walks, speaks to elementary school science classes, and teaches field workshops for local scout groups. The Conservation Coordinator is responsible for preparing the Open Space and Recreation Plan for the Town, which enables the town to receive state reimbursement for land acquisition projects, and assists in review and negotiations for new land purchases.

### **STAFFING**

Current staffing for the Conservation Commission office includes a full-time Conservation Coordinator, and a part-time clerical position.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Permit applications</b>	<b>78</b>	
<b>Wetland Violations Actions</b>	<b>14</b>	

### **BUDGET ISSUES**

New Budget Initiatives for FY08: None

Both the Town Manager's Level Services and Recommended Budget includes funds for creation of a part-time shared analyst position to assist the Conservation Coordinator with all the responsibilities she is responsible for, up to 15 hours per week, and also assist in the Health Office up to 15 hours per week. Currently, each office has only one professional staff member, and when that person is out of the office or on vacation or out sick, there is no one else who can assist customers with their technical questions or issues. These two managers, (as well as the Assistant Town Manager/Personnel Director and the Finance Director/Treasurer-Collector – see their respective budgets), are the only department heads in the Town who have continued conducting the work of offices by themselves. Towns of similar size and demands have two or even three professional staff members in these offices. This is considered a level services budget item because it will allow these two offices to provide a level of service that has dropped in the past several years below unacceptable levels.

This bare bones staffing pattern has been on the priorities list to address as soon as the Town was able to deal with the staffing problems in the police, fire and DPW departments, which was accomplished in the FY06 and the FY07 budget. Reasons why this situation must be addressed in FY08:

- Currently, each of these two managers spend far too much of their time on tasks that can be handled by someone at a lower grade, and higher level tasks get postponed or worse, finished by deadlines but in a hurried manner.
- In the Health Department, the mandates from state and federal government in areas such as pandemic and hazardous materials planning, development of medical reserve programs and other preparations has become a near full-time job, leaving our current Health Director little time to be in the office or doing soils testing work.
- In the Conservation Office, the number of applications for permits, as well as inquiries from property owners has increased dramatically over recent years. Further the complexity of projects has increased. Land is being developed now that was passed by in earlier years due to the amount of wetland or environmental sensitivity issues.
- In both offices, the incumbents have worked for the Town for many years and are approaching ages where they may decide to retire. The Town needs backup staffing both for when these individuals are out, but also to gain knowledge from the incumbents so that the Town is not left in a lurch if one of the department heads left the Town's employ.

I note that trail maintenance is a public safety issue, and the small amounts allotted for maintenance mean that the Town is not able to keep the trails well maintained for the public when they are walking on conservation land. Nor have we been able to dedicate any funds for creating trails on newly acquired conservation land. While this office has been organizing volunteers to help with trail maintenance efforts, this is a problem that will need to be addressed in the future.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>CONSERVATION</b>						
Conservation Coordinator	61,297	62,676	63,076	63,076	63,076	63,076
Staff Assistant			17,153	17,153	-	17,153
Clerical	10,269	10,421	10,888	10,888	10,888	10,888
Sick Leave Buy Back	1,413	1,441	1,494	1,494	1,494	1,494
<b>Sub Total: Personal Services</b>	<b>72,979</b>	<b>74,538</b>	<b>92,611</b>	<b>92,610</b>	<b>75,458</b>	<b>92,610</b>
General Expense	1,660	1,660	1,660	1,660	1,660	1,660
Clothing	600	300	300	300	300	300
Trail Maintenance	3,000	3,000	3,000	3,000	3,000	3,000
Travel	275	650	650	650	650	650
<b>Sub Total: Expenses</b>	<b>5,535</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>
<b>Total: Conservation</b>	<b>78,514</b>	<b>80,148</b>	<b>98,221</b>	<b>98,220</b>	<b>81,068</b>	<b>98,220</b>



## **GENERAL GOVERNMENT: Planning and Community Development Department**

### **MISSION OF THE DEPARTMENT**

The mission of the department is to provide technical advisory services and coordination of town officials, committees, and commissions on issues involving planning, zoning, land management, development/re-development and affordable housing.

### **DESCRIPTION OF SERVICES**

The department provides staff services on a regular basis, directly to the Planning Board, Zoning Board, Board of Selectmen, Community Preservation Committee, Design Review Board, Community Housing Committee, Historical Commission, and Historic Districts Commission. They also provide services for the Conservation Commission and the Board of Health. The department processes and reviews development applications, coordinates land acquisition projects, and communicates town projects and goals to the public via the website and other media. Additionally, this department assists with budget preparations for the various boards and committees, coordinates data collection and serves as advisors to the Town Manager on all issues relating to land use, planning, zoning and development.

### **STAFFING**

The personnel in the department include a full-time Director of Planning and Community Development, a part-time Assistant Planner (funded partially with CPA funds), a part-time Community Housing Specialist (funded entirely with CPA funds) and a part-time clerical position. The Assistant Planner and Community Housing Specialists positions were added to the department in FY07, as was a recording secretary to attend Planning Board meetings bi-monthly.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Subdivision Applications Filed</b>	<b>1</b>	<b>3</b>
<b>Subdivision Lots Approved</b>	<b>15</b>	<b>13</b>
<b>Senior Development Permit Applications Filed</b>	<b>1</b>	<b>1</b>
<b>Senior Development Units Approved</b>	<b>33</b>	<b>52</b>
<b>Comprehensive Permits Filed</b>	<b>2</b>	<b>1</b>
<b>Comprehensive Permit Units Approved</b>	<b>0</b>	<b>45</b>
<b>Affordable Housing Units Constructed</b>	<b>0</b>	<b>2</b>
<b>Site Plan Applications Reviewed</b>	<b>4</b>	<b>3</b>

### **FY08 GOALS AND INITIATIVES**

- Seek funding to supplement Town funding for office staff, including CPC funding for CPC related projects and increased fees for 40B projects
- Continue Town Center Project process
- Continue Traffic Management process, working with DPW Director and Police Chief
- Work with Housing Trust to develop affordable housing
- Progress on Route 20 wastewater project
- Continue work on major zoning bylaws, i.e., Earth Removal, farm animals, Low Impact Development
- Continue assessing the impacts to Sudbury of the Wayland Town Center project

- Complete RFPs on Melone and Mahoney feasibility
- Update Community Preservation Committee Report

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Hired Assistant Planner and Community Housing Specialist
- Walkway Planning and Prioritization Initiative begun
- Formed Housing Trust
- Created Guidelines for 40B developments
- Became Monitoring Agent for local 40B developments
- Completed the Heritage Landscape Inventory program through MA Department of Conservation and Recreation
- Completed Willis Road walkway
- Coordinated review of major development projects with Conservation Coordinator, Health Director, Public Works Director, Fire Chief and Building Inspector

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget and Level Services Budget are the same for this Department. Both show an increase already incurring for FY07 in required, level services. They are as follows: A night-time recording secretary is required approximately 5 hours per week to attend Planning Board meetings. This increase better reflects the time and effort required for all Planning Board meeting activities. The budget also includes a \$500 increase for general expense. The recent increase in staffing and the overall expansion in department responsibilities have required additional office supplies and fixtures.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PLANNING BOARD &amp; DESIGN REVIEW BOARD</b>						
Town Planner	72,982	80,019	86,371	86,371	86,371	86,371
Assistant Planner	6,000	24,000	23,650	23,650	23,650	23,650
Clerical	23,822	25,127	32,367	32,367	28,075	32,367
Stipend	-	-	1,000	1,000	1,000	1,000
<b>Sub Total: Personal Services</b>	<b>102,804</b>	<b>129,146</b>	<b>143,387</b>	<b>143,387</b>	<b>139,095</b>	<b>143,387</b>
General Expense	2,000	2,000	2,500	2,500	2,500	2,500
Professional Development	400	750	750	750	750	750
Clothing Allowance	125	125	125	125	125	125
<b>Sub Total: Expenses</b>	<b>2,525</b>	<b>2,875</b>	<b>3,375</b>	<b>3,375</b>	<b>3,375</b>	<b>3,375</b>
<b>Total: Planning Board</b>	<b>105,329</b>	<b>132,021</b>	<b>146,762</b>	<b>146,762</b>	<b>142,470</b>	<b>146,762</b>

**GENERAL GOVERNMENT: Board of Appeals**

**MISSION OF BOARD**

The Board of Appeals is a statutory Board provided for by Massachusetts State law as well as Sudbury's own bylaws. In the broadest sense, it exists to grant relief from the Town's Zoning Bylaw when literal enforcement would constitute hardship to the property owner without significant impairment of the public welfare and/or without being substantially more detrimental to the adjoining neighborhoods.

**DESCRIPTION OF SERVICES**

The Board acts as one of Sudbury's special permit granting authorities, hears applications for comprehensive permits under G.L. c.40B and considers applications for relief from the Town's Zoning Bylaw. The ZBA is comprised of five members appointed by the Board of Selectmen. Several associate members are also appointed to serve in place of the regular members as needed. The associate members also serve as full members of the Earth Removal Board.

**STAFFING**

Staff consists of a part-time clerical position.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Total Cases Filed</b>	<b>50</b>	<b>57</b>
<b>Tear down applications filed</b>	<b>10</b>	<b>14</b>
<b>Comprehensive Permit applications filed</b>	<b>2</b>	<b>1</b>
<b>Pre-existing, non-conforming lots or structures</b>	<b>6</b>	<b>9</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

The workload of this office depends on the number of applications filed. The increase in normal permits filed, and number of lengthy projects submitted, such as those associated with a comprehensive permit (40B), has required additional clerical hours. The increased permit processing and associated hearings are estimated to require an additional 5 hours per week or more, than what has been budgeted for FY07. While the Town Manager's Recommended Budget for FY08 requests an additional \$6,000 in wages to cover this increase in hours, the net financial impact may be greatly reduced by permit application fee revenues, should the Town authorize the creation of an Application Fee Revolving Fund (pursuant to Chapter 44, s. 53E ½). Revolving fund revenues in its first year of operation (in FY08) are expected to be \$4,000. Failure to fund this budget line item request, or to establish the aforementioned revolving fund will undoubtedly require a reserve fund transfer to each year to cover shortfalls.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BOARD OF APPEALS</b>						
Clerical	23,840	24,342	31,072	31,072	25,072	31,072
<b>Sub Total: Personal Services</b>	<b>23,840</b>	<b>24,342</b>	<b>31,072</b>	<b>31,072</b>	<b>25,072</b>	<b>31,072</b>
General Expense	1,850	1,850	1,850	1,850	1,850	1,850
<b>Sub Total: Expenses</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>
<b>Total: Board of Appeals</b>	<b>25,690</b>	<b>26,192</b>	<b>32,922</b>	<b>32,922</b>	<b>26,922</b>	<b>32,922</b>
<b>OFFSET Application Revolving</b>	-		4,000	4,000	4,000	4,000
<b>Net Board of Appeals</b>	<b>25,690</b>	<b>26,192</b>	<b>28,922</b>	<b>28,922</b>	<b>22,922</b>	<b>28,922</b>

# PUBLIC SAFETY SERVICES



**Sudbury Fire  
Headquarters**

**Sudbury Police  
Station**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PUBLIC SAFETY</b>						
Police	2,345,053	2,530,756	2,584,379	2,584,379	2,564,379	2,584,379
Fire	2,567,006	2,642,637	2,706,804	2,728,454	2,668,904	2,721,354
Building Department	810,242	906,484	962,190	968,690	962,190	968,690
Dog Officer	11,341	11,502	12,483	12,483	10,755	12,483
<b>Total Public Safety</b>	<b>5,733,642</b>	<b>6,091,379</b>	<b>6,265,857</b>	<b>6,294,007</b>	<b>6,206,229</b>	<b>6,286,907</b>

**MISSION OF THE DEPARTMENT**

The mission of the Sudbury Police Department is to work with all residents of the community to create a positive partnership emphasizing equality, fairness, integrity and professionalism. Our objective is to provide the most responsive and highest quality police services possible by working in a collaborative proactive manner with the community to identify and solve problems, prevent crime, and apprehend offenders in a manner consistent with established State, and local laws.

**DESCRIPTION OF SERVICES**

The Sudbury Police Department provides a complete range of public safety and community-based services including: criminal investigation, motor vehicle law enforcement, preventive patrol and emergency response. The Department provides crime prevention programs, services to youth, D.A.R.E., and the processing of permits including firearms, door to door solicitors', raffles and public assembly.

**STAFFING**

The Sudbury Police Department has a sworn staff of 29 personnel (one chief, two lieutenants, five sergeants, and twenty-one patrol officers) plus four dispatchers and two administrative positions.

**FY07/08 GOALS AND INITIATIVES**

- To totally implement traffic safety program in the community and continue to develop a community relations plan so that residents are aware of how to access the program to ensure their traffic concerns are addressed.
- To complete all aspects of the departments radio frequency re-banding required by the FCC.
- To continue moving forward with the process of the building of the proposed new police station.
- Update aging department radio transmitter and receiver using state grant monies.
- To continue progress on completing the Department Policies and Procedures and the State Accreditation process.
- Continue to participate in the Town's Local Emergency Planning Committee with the goal of attaining certification

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Working with the Town Manager, DPW Director and Town Planner to create an active traffic safety program which is now in its initial stages.
- The Police Station Feasibility Study is completed and the Design phase of the project will be ready to bring to Town Meeting in 2007.
- Worked with the Assistant Town Manager/Personnel Director in progressing towards getting the Sudbury Police Department fully staffed with high quality personnel in all positions.
- Continued progress on the Department Policies and Procedures, with 60% of them completed and instituted and the goal of having them all completed by July, 2007.

- Continued progress on the Accreditation Process, with the goal of receiving Accreditation by July 1, 2007.
- Participated in the Town's Local Emergency Planning Committee, having obtained a provisional certification
- Have improved the quality and quantity of information on Police Department web site.
- Have integrated the School Departments student roster information into the Reverse 911 system and have run successful town wide tests of the system.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
Calls for Service	17,979	18,364*
Arrests	285	253
Response to motor vehicle accidents	706	646
911 Calls Received	2,186	2309

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget is the same as the Level Services Budget as no new budget initiatives are requested this year. In FY07 fuel costs were incorporated into the Police Department's budget from the Department of Public Work's budget. In light of this being the first fiscal year, necessary adjustments have become apparent. In forecasting the total funding necessary for fuel costs we have estimated an additional \$14,000 will be needed to fully fund the account by utilizing the costs from the first three months of FY07. Some of the explanations for increases in the Level Services budget compared to the FY07 budget are as follows:

- Anticipated increases in the state contract pricing for cruiser purchases as well as the decreased trade-in values results in \$5,000 needed to fully fund the account.
- Increases in service agreements for hardware/ software maintenance have resulted in an increase of \$1,800 relative to the Live Scan Fingerprint System. There was also an increase of \$200 a year on the costs of the mobile lap top computers air time (CDMA).
- The Metropolitan Law Enforcement Council membership dues have increased by \$500.
- To help maintain the appropriate communications among officers in an emergency an increase of \$1,500 is needed to purchase Nextel Phones to be placed in the six cruisers that do not have one currently and in addition as a backup to our current radio system during an emergency situation.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>POLICE DEPT</b>						
Police Chief	114,133	115,845	130,265	130,265	130,265	130,265
Lieutenant	164,116	174,341	181,699	181,699	181,699	181,699
Patrol Officers	1,272,628	1,387,233	1,371,058	1,371,058	1,371,058	1,371,058
Night Differential	20,300	20,300	20,300	20,300	20,300	20,300
Overtime	197,583	197,583	217,583	217,583	197,583	217,583
Clerical	91,428	94,654	91,478	91,478	91,478	91,478
Dispatchers	162,266	152,631	160,836	160,836	160,836	160,836
Sick Leave Buy Back	5,500	5,500	5,665	5,665	5,665	5,665
Holiday Pay	14,506	14,506	14,941	14,941	14,941	14,941
Non-accountable Clothing	-	8,942	10,730	10,730	10,730	10,730
Stipend	30,850	31,350	31,350	31,350	31,350	31,350
<b>Sub Total: Personal Services</b>	<b>2,073,310</b>	<b>2,202,885</b>	<b>2,235,905</b>	<b>2,235,905</b>	<b>2,215,905</b>	<b>2,235,905</b>
General Expense	54,818	52,083	54,083	54,083	54,083	54,083
Maintenance	56,015	60,750	62,750	62,750	62,750	62,750
Travel	2,500	2,500	3,000	3,000	3,000	3,000
Uniforms	28,520	20,508	17,790	17,790	17,790	17,790
Tuition	10,000	10,000	10,000	10,000	10,000	10,000
Equipment	7,500	7,500	7,500	7,500	7,500	7,500
Gasoline	-	62,140	75,961	75,961	75,961	75,961
<b>Sub Total: Expenses</b>	<b>159,353</b>	<b>215,481</b>	<b>231,084</b>	<b>231,084</b>	<b>231,084</b>	<b>231,084</b>
Police Cruisers	112,390	112,390	117,390	117,390	117,390	117,390
<b>Sub Total: Capital</b>	<b>112,390</b>	<b>112,390</b>	<b>117,390</b>	<b>117,390</b>	<b>117,390</b>	<b>117,390</b>
<b>Total: Police</b>	<b>2,345,053</b>	<b>2,530,756</b>	<b>2,584,379</b>	<b>2,584,379</b>	<b>2,564,379</b>	<b>2,584,379</b>
<b>OFFSET COP FAST</b>	-	30,000	23,266	23,266	23,266	23,266
<b>Net Police</b>	<b>2,345,053</b>	<b>2,500,756</b>	<b>2,561,113</b>	<b>2,561,113</b>	<b>2,541,113</b>	<b>2,561,113</b>



**PUBLIC SAFETY: Fire Department**

**MISSION OF THE DEPARTMENT**

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

**DESCRIPTION OF SERVICES**

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

**STAFFING**

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

**FY08 GOALS AND INITIATIVES**

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

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

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

**PERFORMANCE/WORKLOAD INDICATORS**

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

## **BUDGET ISSUES**

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

New Budget Initiatives for FY08: The Town Manager's Recommended Budget requests funds to add one position which will help reduce overtime expenditures, keep open all three fire stations and allow for the expenses of providing the same level of fire protection and emergency medical services as is currently provided in FY07. Note that due to the anticipated savings on overtime from adding one more firefighter position, the net on this budget is less than \$15,000, plus there is an increase in the benefits budget for one additional position.

Otherwise, the Town Manager's Recommended Budget and the Level Services Budget are the same. Since energy costs have continued to increase, the budget for gasoline and diesel fuel has been increased, as has the cost of utilities for the three stations operated by the Fire Department. Replacement of the Chief's vehicle occurs under this budget and will result in the release of a retired but good quality emergency response car to another department, relieving budget pressures elsewhere.

The Chief requested that the amount for tuition for courses taken by firefighters has be increased, as departmental personnel have indicated their intention to take courses and the language of the contract requires that funds be available for those courses. However, I plan to ask the Finance Committee to earmark the additional \$7,100 requested for tuition in the Reserve Fund, so that if departmental personnel do not take the courses, these funds can be reallocated to other uses.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>FIRE DEPT</b>						
Fire Chief	97,221	102,675	114,155	114,155	114,155	114,155
Assistant Chief	73,073	73,073	88,039	88,039	88,039	88,039
Firefighters/EMTs	1,624,400	1,631,256	1,617,408	1,665,973	1,617,408	1,665,973
Overtime	350,399	350,399	364,949	330,934	364,949	330,934
Clerical	31,259	33,471	31,372	31,372	31,372	31,372
Dispatchers	113,271	119,351	123,931	123,931	123,931	123,931
Non-accountable Clothing	-	22,000	23,300	23,300	23,300	23,300
Sick Buy Back	3,323	12,060	14,737	14,737	14,737	14,737
<b>Sub Total: Personal Services</b>	<b>2,292,946</b>	<b>2,344,285</b>	<b>2,377,890</b>	<b>2,392,440</b>	<b>2,377,890</b>	<b>2,392,440</b>
General Expense	32,810	34,010	40,985	40,985	40,985	40,985
Maintenance	95,500	61,156	63,000	63,000	63,000	63,000
Alarm Maint.	1,500	3,000	3,000	3,000	3,000	3,000
Travel, In State	500	500	500	500	500	500
Utilities	-	42,880	52,770	52,770	52,770	52,770
Uniforms	38,500	17,800	18,800	18,800	18,800	18,800
Tuition	15,000	15,000	15,000	22,100	22,100	15,000
Contracted Services	19,000	34,000	36,500	36,500	36,500	36,500
Equipment	26,250	26,250	28,750	28,750	28,750	28,750
Gasoline/Diesel Fuel	-	18,756	24,609	24,609	24,609	24,609
<b>Sub Total: Expenses</b>	<b>229,060</b>	<b>253,352</b>	<b>283,914</b>	<b>291,014</b>	<b>291,014</b>	<b>283,914</b>
Capital Items	45,000	45,000	45,000	45,000	-	45,000
<b>Sub Total: Capital Expenses</b>	<b>45,000</b>	<b>45,000</b>	<b>45,000</b>	<b>45,000</b>	<b>-</b>	<b>45,000</b>
<b>Total: Fire</b>	<b>2,567,006</b>	<b>2,642,637</b>	<b>2,706,804</b>	<b>2,728,454</b>	<b>2,668,904</b>	<b>2,721,354</b>
<b>OFFSET Ambulance Fund</b>	<b>210,189</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>
<b>Net Fire</b>	<b>2,356,817</b>	<b>2,412,295</b>	<b>2,476,462</b>	<b>2,498,112</b>	<b>2,438,562</b>	<b>2,491,012</b>

## **PUBLIC SAFETY: Building Department**

### **MISSION OF THE DEPARTMENT**

The mission of the Building Department is to contribute to the protection of the public through the enforcement of building codes and zoning bylaws. The Building Department is also responsible for keeping many Town Buildings safe, clean, healthy and energy-efficient for use by the public and Town employees.

### **DESCRIPTION OF SERVICES**

The Building Department staff enforces State building, electrical, plumbing, gas and mechanical codes, as well as local zoning by-laws and Architectural Access Board Regulations. Many of the functions of the Department are mandated by the Commonwealth of Massachusetts, including enforcement and implementation of the State building code, the State zoning act, the State gas and plumbing codes, and the State architectural access code. Additional local codes and standards must also be enforced. Staff issue permits, inspect construction sites, conduct periodic safety inspections of restaurants, schools, religious institutions, and other places of assembly, and levy fines or prosecute when necessary to obtain code compliance. This office processes 2,000 permits a year, with three to seven inspections per permit.

The Building Maintenance function of this department plans and budgets for the energy needs of Town buildings, secures contracted cleaning services and performs preventative maintenance and minor repairs on Town Buildings including the Town Hall, the Flynn Building, the DPW Building, Loring Parsonage, the Police Station and the Fairbank Community Center. Staff maintains the exterior walkways, including leaf pick up, snow removal, and sanding of these buildings as well. Additionally this department maintains three residential structures owned by the Town: the Haynes Meadow House, the Carding Mill House, and the Frost Farmhouse. Finally, they are responsible for interoffice mail delivery.

### **STAFFING**

This office consists of the Building Inspector, an Assistant Building Inspector, an Electrical Inspector/Supervisor of Buildings, a Plumbing Inspector (part-time), two custodians, a part-time zoning enforcement field agent, and an administrative assistant. In addition to his various inspection and facilities maintenance functions, the Building Inspector also work with the Permanent Building Committee on major projects for repair, renovation and new construction of Town buildings.

### **FY08 GOALS AND INITIATIVES**

- Continue working with Technology Director to purchase and install permit software with funds appropriated by Town Meeting.
- Improve the heating distribution system throughout the Fairbank Community Center.
- Continue the Flynn beautification project, adding fencing to screen the generator and air conditioner on the west side, as well as, paint the building. Continue replacing the single pane glass windows with more energy efficient windows at Flynn.
- Continue to maintain town's three residential structures and work with the Town Manager to determine best use for town owned properties.

- Seek CPC funding for FY09 for hiring consultants to begin design plans for the restoration of Town Hall.
- Continue to address office space issues at Flynn and DPW; find office space for staff in the Planning Office and the Building Department.
- Work with Public Works Director and Planning and Land Use Director to develop a plan for installing parking lot lights in the rear of the Town Hall.
- Obtain rebates from Keyspan for the installation of New Energy savings heating appliances.

#### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Completed construction of a new office for the Finance Director and storage for Accounting, in the Flynn Building.
- Continued the progress of the Flynn beautification with the reconstruction of the rear bulkhead, the replacement of 8 windows in the Flynn basement, installation of an irrigation system along with new professional installed landscaping and re-roofing the pitched roof.
- Completed the replacement of the 34 year old boiler in the Flynn Building by adding a new, more energy efficient boiler.
- Completed the installation of two new boilers and two new hot water heaters at the Fairbank Community Center. New lighting, painting and insulation of the boiler room have also been completed.
- Renovated the Haynes Meadow House in order to go out to bid as a rental property. Currently, the house is rented and the department provides property maintenance and security for tenant.
- Hired a new full time Building Inspector to fill the position formerly held by Jack Hepting.
- Assisted Town Manager in securing favorable electricity and natural gas contracts for the supply of the respective utilities.
- Constructed new storage facility for the Town Clerk's office and assisted with office renovations in the Clerk's office.
- Continued assisting the Permanent Building Committee in their efforts to solve the indoor air quality problem at the new DPW building.
- Successfully went out to bid for the contracted cleaning services at the Fairbank Community Center Building.

#### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>New Residents Permits</b>	<b>22</b>	<b>28</b>
<b>New Residents Permits (value)</b>	<b>\$9,571,000</b>	<b>\$9,830,400</b>
<b>Tear down and Reconstructions</b>	<b>15</b>	<b>16</b>
<b>Tear down and Reconstructions (value)</b>	<b>\$3,986,000</b>	<b>\$5,477,200</b>
<b>Non-Residential Permits</b>	<b>30</b>	<b>33</b>
<b>Non-Residential Permits (value)</b>	<b>\$3,606,500</b>	<b>\$2,870,900</b>
<b>Swimming Pools</b>	<b>13</b>	<b>17</b>
<b>Swimming Pools (value)</b>	<b>\$365,000</b>	<b>\$465,700</b>
<b>Additions/Renovations</b>	<b>335</b>	<b>355</b>
<b>Additions/Renovations (values)</b>	<b>\$19,009,600</b>	<b>\$16,837,000</b>

## **BUDGET ISSUES**

New Initiatives for FY08: None

The Town Manager's Recommended Budget and the Level Services level services budget are the same amount. The overall increase is \$55,706 over FY07 appropriations. Similar to last year, the majority of this increase is due to utility costs. Last year we had a 33% increase in utilities. Much of this increase was due to the sharp increase of the cost of natural gas and the fact that we were at the end of our 5-year, fixed-price contract. This year we anticipate our utilities to increase approximately 10% over last year.

Both budgets provide for an additional \$9,900 for building maintenance. This increase is to provide additional annual maintenance and testing of the DPW Building HVAC system. This system has been problematic and additional testing and maintenance is critical to detecting and fixing any problems in this HVAC system.

The department request budget includes one capital building project. The \$15,000 initiative for the building improvement is earmarked for the replacement of the roof shingles at the Frost Farm House.

Finally, the Department Request budget contains an increase for contracted services to provide cleaning services at the Loring Parsonage, based on the assumption that the Sudbury Foundation will be moving out; in which case Town will be responsible for such cleaning until a new, suitable tenant is found. However, this budget request is not recommended for funding at this time.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BUILDING DEPT.</b>						
Inspector	70,020	71,595	74,155	74,155	74,155	74,155
Supv. of Town Bldgs.	54,417	55,634	55,834	55,834	55,834	55,834
Asst. Bldg Inspector	34,997	54,045	53,567	53,567	53,567	53,567
Clerical	40,714	49,670	51,160	51,160	51,160	51,160
Deputy Inspector	2,640	2,640	2,640	2,640	2,640	2,640
Zoning Enforcement Agent	7,000	7,000	7,000	7,000	7,000	7,000
Plumbing/ Gas Inspector	27,183	-	-	-	-	-
Sealer of Weights	2,150	2,150	2,150	2,150	2,150	2,150
Wiring Inspector	13,050	13,050	13,050	13,050	13,050	13,050
Custodial	81,406	82,627	85,094	85,094	85,094	85,094
Sick Buyback	-	-	1,309	1,309	1,309	1,309
<b>Sub Total: Personal Services</b>	<b>333,577</b>	<b>338,411</b>	<b>345,960</b>	<b>345,960</b>	<b>345,960</b>	<b>345,960</b>
General Expense	3,500	4,200	4,200	4,200	4,200	4,200
Utilities	266,790	356,198	394,955	394,955	394,955	394,955
Town Mgr Bldg. Maint.	119,900	120,000	129,900	129,900	129,900	129,900
Vehicle Maintenance	1,000	1,500	1,500	1,500	1,500	1,500
Contracted services	66,200	66,200	66,200	72,700	66,200	72,700
Uniforms	1,475	1,475	1,475	1,475	1,475	1,475
In-State Travel	2,800	3,000	3,000	3,000	3,000	3,000
<b>Sub Total: Expenses</b>	<b>461,665</b>	<b>552,573</b>	<b>601,230</b>	<b>607,730</b>	<b>601,230</b>	<b>607,730</b>
Building Improvements	15,000	15,500	15,000	15,000	15,000	15,000
<b>Sub Total: Capital Expenses</b>	<b>15,000</b>	<b>15,500</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>
<b>Total: Building</b>	<b>810,242</b>	<b>906,484</b>	<b>962,190</b>	<b>968,690</b>	<b>962,190</b>	<b>968,690</b>

**PUBLIC SAFETY: Dog Officer**

**MISSION OF THE OFFICE**

The Dog Officer is responsible for enforcement of dog control laws and investigation of complaints. Some of these calls are particularly difficult and required many hours of staff time.

**DESCRIPTION OF SERVICES**

The Dog Officer responds to complaints from residents and when appropriate brings complaints to the Board of Selectmen for a hearing on possible measures to control dogs who are nuisances or dangerous.

**STAFFING**

This office is staffed by one part-time dog officer supplemented with backup/coverage from a local contractor that specializes in Canine Control.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The budget maintains the same personnel and basic, unavoidable expenses of meeting this department's mission.

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY04	FY05
<b>Calls for Service</b>	<b>904</b>	<b>781</b>
<b>Dogs Picked up</b>	<b>28</b>	<b>29</b>

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>DOG OFFICER</b>						
Dog Officer	8,897	9,030	9,301	9,301	9,301	9,301
Sick Leave Buy Back	674	684	705	705	705	705
<b>Sub Total: Personal Services</b>	<b>9,571</b>	<b>9,714</b>	<b>10,005</b>	<b>10,005</b>	<b>10,005</b>	<b>10,005</b>
General Expense	400	400	750	750	750	750
Vehicle Maintenance	200	200	540	540	-	540
Contracted Services	1,170	1,188	1,188	1,188	-	1,188
<b>Sub Total: Expenses</b>	<b>1,770</b>	<b>1,788</b>	<b>2,478</b>	<b>2,478</b>	<b>750</b>	<b>2,478</b>
<b>Total: Dog Officer</b>	<b>11,341</b>	<b>11,502</b>	<b>12,483</b>	<b>12,483</b>	<b>10,755</b>	<b>12,483</b>



# Public Works Department



Public Works  
Building

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PUBLIC WORKS</b>						
Engineering	344,477	361,944	391,518	391,518	376,482	391,518
Streets and Roads	2,016,873	2,131,578	2,336,597	2,361,597	2,305,097	2,361,597
Trees and Cemetery	287,477	305,800	329,647	339,647	324,647	339,647
Parks and Grounds	234,256	269,523	285,761	299,191	276,783	299,191
<b>Total Public Works</b>	<b>2,883,083</b>	<b>3,068,845</b>	<b>3,343,523</b>	<b>3,391,953</b>	<b>3,283,009</b>	<b>3,391,953</b>

## **PUBLIC WORKS: Engineering and Administration**

### **MISSION OF THE OFFICE**

The Department of Public Works is a professional team committed to improving the quality of life in Sudbury and supporting the Town's core values. We make every effort to maximize the efficient, effective use of our resources in the support, maintenance and upkeep of the infrastructure, public lands and programs. We are committed to public safety and providing prompt, courteous quality service to our customers and each other.

### **DESCRIPTION OF SERVICES**

The Engineering division of this department is responsible for the design of public works projects, plan review of proposed developments, implementation of a GIS system, and assistance on Town and School building projects. The Division also provides a wide range of technical assistance to other departments and committees, including the Planning Department, Building Inspection Department, Conservation Department, Recreation Department, Police and Fire Departments and the Town Manager's office. Many other customers are supported as well, including residents, businesses, contractors, consultants, and realtors as well as State and Federal entities. The Engineering Division stores, maintains and updates public records and plans, and designs and administers public works project of all kinds. Construction plans and documents are prepared, reviewed, and bid; construction inspections are performed and overseen by staff.

The Town Engineer also serves as the Director of the Public Works Department and as such reports directly to the Town Manager and serves on the Town Manager's Senior Management Team. As DPW Director, he oversees the management of \$3.3 million in appropriations, and provides executive level planning and direction to five divisions, and 35 employees. Services provided by these employees affect the Town's public safety, community character, property values and quality of life. Further, he serves on the Town's land use planning working group, a staff task force chaired by the Planning and Community Development Director, to evaluate and help guide all development proposals made to various offices of the Town.

### **STAFFING**

The engineering division staff consists of the Town Engineer/DPW Director, Assistant Town Engineer, one Civil Engineer, one Junior Civil Engineer, a part-time Engineering Aide in the summer, and an Office Manager. This office has two fewer staff persons than it had in 1990, which has limited the projects it can support.

### **FY08 GOALS AND INITIATIVES**

- Continue property line survey, base line survey, topographic survey and design of the Marlboro Road/Willis Road Intersection.
- Provide topographic survey, right-of-way survey for the Wayside Inn and Route 20 intersection.
- Provide as-built survey of Mt. Pleasant North Cemetery and New Town Cemetery.

- DPW Director/Town Engineer to serve as lead staff on the regional all hazards mitigation project (required by Homeland Security/FEMA/MEMA in order to qualify for grants).
- DPW Director/Town Engineer to serve as key department head on Town Center Redesign project
- DPW Director/Town Engineer to continue to serve as lead department head on Rail Trail Conversion Advisory Committee.
- DPW Director/Town Engineer to serve as lead department head on the Solid Waste Options Committee
- Continue to plan for and coordinate with Mass Highway regarding projects needed at intersections on Route 20

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

- Provided construction layout for the Concord Road/Union Ave. intersection.
- Provided topographic survey, right-of-way survey and drainage design for Dakin Road at Blacksmith Drive.
- Provided construction layout for the Willis Road Walkway.
- Continued developing and updating data layers for Town's Geographical Information System.
- Worked with the Town of Wayland's committee established to investigate creation of a consolidated Public Works Department in that town.

### **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Level Services and Recommended Budget are the same; both restore a part-time engineering aide position to the Engineering Division by converting a current summer intern position into a full-time engineering aide position. This additional position is an attempt to restore to level service capacity this office, cut in previous years, and is badly needed due to the inspectional services and construction verification demands on this office.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets are the same as FY07. This budget does not advance GIS efforts at a time when the Town is trying to move ahead on our GIS program.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ENGINEERING DEPARTMENT</b>						
Dir. of Public Works	97,330	100,945	108,149	108,149	108,149	108,149
Engineering Staff	169,727	180,113	184,965	184,965	184,965	184,965
Clerical	39,125	41,257	43,189	43,189	43,189	43,189
Summer Help	13,756	14,598	30,072	30,072	15,036	30,072
Sick Leave Buy Back	4,946	5,253	4,190	4,190	4,190	4,190
<b>Sub Total: Personal Services</b>	<b>324,884</b>	<b>342,166</b>	<b>370,565</b>	<b>370,565</b>	<b>355,529</b>	<b>370,565</b>
General Expense	14,718	14,718	14,718	14,718	14,718	14,718
Maintenance	2,500	2,500	2,500	2,500	2,500	2,500
Travel	100	110	110	110	110	110
Uniforms	2,275	2,450	3,625	3,625	3,625	3,625
<b>Sub Total: Expenses</b>	<b>19,593</b>	<b>19,778</b>	<b>20,953</b>	<b>20,953</b>	<b>20,953</b>	<b>20,953</b>
<b>Total: Engineering</b>	<b>344,477</b>	<b>361,944</b>	<b>391,518</b>	<b>391,518</b>	<b>376,482</b>	<b>391,518</b>

## **PUBLIC WORKS: Streets and Roads**

### **MISSION OF THE OFFICE**

The mission of the Streets and Roads Division is to protect the safety, health and welfare of the Town Residents by maintaining the town streets, walkways and storm water system in a safe and clean condition. This department also provides for the safe movement of vehicular traffic by performing minor construction repairs, removing snow and ice from streets, sweeping of streets, installing traffic signs and lane or line markers and supervising the work of contractual service providers who perform repairs, cleaning or maintenance work. In addition, the Road Machinery Division ensures that the Town's fleet is always operational and well maintained by providing an efficient and effective maintenance and repair program and fuel management system.

### **DESCRIPTION OF SERVICES**

The Streets and Roads cost center is responsible for maintenance, construction, and snow removal of Town ways, including streets, curbing, walkways, drain systems, guardrails and signs. Priority snow removal is given to all school parking lots and driveways. Additional duties include roadside and sidewalk mowing, brush clearance, litter control, seasonal support to other town departments (parades, elections, facility maintenance, celebrations). The department maintains approximately 140 miles of roads and 45 miles of walkways. This division annually evaluates street and walkway conditions as part of the pavement management plan.

### **STAFFING**

Division staffing includes a Director of Operations, a Management Analyst, one Full-time Secretary, one Part-time Secretary, one Mechanic, one Assistant Mechanic, two Foremen, two Crew Leader/Heavy Equipment Operators, five Heavy Equipment Operators, two Light Equipment Operators and one Heavy Laborer.

### **FY08 GOALS AND INITIATIVES**

- Continue to update the snow plowing fleet as well as other trucks and equipment.
- Maintain town-wide infrastructure including street sweeping, traffic lines, paving, walkways, drain systems, guardrails, signs and snow removal programs.
- Continue to implement vigorous vehicle maintenance program to keep town fleet in compliance with safety and preventative maintenance schedules.
- Implement new Pavement Management Program software, including vehicle maintenance and parts inventory modules

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

- Administered mandatory street sign replacement program.
- Continued to build on website visibility to inform residents of maintenance and special projects being performed in the town.
- Reconstructed 3 miles of walkways.
- Constructed 2,000 ft. of new walkways along Willis Road.
- Installed 6,000 ft of wood guardrail.
- Arrowhead Road reconstructed

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY05	FY06
Miles of Roads Maintained		140
Drainage Structures Repaired	25	30
Guard Rail Installed	2,000 ft.	6,000 ft.
Pieces of Equipment Maintained	68	90

## BUDGET ISSUES

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is higher than the Level Services Budget request by \$25,000, which is assigned to the vehicle maintenance account. The Town continues to operate with an aged fleet of trucks, sanders and other equipment, all needing more parts and servicing from the mechanics. This division has begun a better preventative maintenance program now that there are two mechanics; that too requires more in parts and materials.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets provide the same service levels as FY07, but with a number of adjustments for cost increases, primarily due to the increases in materials used by this division. Given the much higher costs of gasoline, that line item has been increased by \$25,896. The roadwork account is also up by \$50,000, as costs and materials in this account go up similarly to the energy costs over this past year. Snow & Ice expenditures are also expected to increase in FY08. The Town has deficit spent this particular expense category in recent years due to severe conditions as well as higher than anticipated cost of salt and other road safety materials.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>STREETS &amp; ROADS</b>						
Highway Dir. of Operations	-	63,156	65,825	65,825	65,825	65,825
Management Analyst	63,207	66,819	71,791	71,791	71,791	71,791
Non-Clerical	538,796	567,483	577,261	577,261	577,261	577,261
Overtime	21,353	21,353	21,353	21,353	21,353	21,353
Clerical	47,983	50,466	52,186	52,186	52,186	52,186
Summer Temp. Labor	4,872	4,872	5,018	5,018	5,018	5,018
Sick Leave Buy Back	1,146	1,419	1,462	1,462	1,462	1,462
<b>Sub Total: Personal Services</b>	<b>677,357</b>	<b>775,568</b>	<b>794,896</b>	<b>794,896</b>	<b>794,896</b>	<b>794,896</b>
General Expense	11,500	11,500	12,000	12,000	11,500	12,000
Gasoline	141,240	114,104	140,000	140,000	135,000	140,000
Bldg. Maintenance	9,661	12,500	16,000	16,000	15,000	16,000
Vehicle Maintenance	102,038	104,588	152,138	177,138	127,138	177,138
Utilities	12,500	12,500	13,250	13,250	13,250	13,250
Street Lighting	62,600	53,475	53,475	53,475	53,475	53,475
Travel	200	200	200	200	200	200
Uniforms	17,045	17,045	17,045	17,045	17,045	17,045
Tuition	1,500	1,500	1,500	1,500	1,500	1,500
Police detail	40,000	40,000	42,500	42,500	42,500	42,500
Roadwork	400,500	450,000	500,000	500,000	500,000	500,000
<b>Sub Total: Expenses</b>	<b>798,784</b>	<b>817,412</b>	<b>948,108</b>	<b>973,108</b>	<b>916,608</b>	<b>973,108</b>
Vehicle Leases/Purchases	237,628	185,313	178,938	178,938	178,938	178,938
<b>Sub Total: Capital Expenses</b>	<b>237,628</b>	<b>185,313</b>	<b>178,938</b>	<b>178,938</b>	<b>178,938</b>	<b>178,938</b>
Snow & Ice Overtime	92,783	106,089	117,407	117,407	117,407	117,407
Snow & Ice Contractors	72,275	96,655	106,520	106,520	106,520	106,520
Snow & Ice Materials	138,046	150,541	190,728	190,728	190,728	190,728
<b>Sub Total: Snow &amp; Ice</b>	<b>303,104</b>	<b>353,285</b>	<b>414,655</b>	<b>414,655</b>	<b>414,655</b>	<b>414,655</b>
<b>Total: Streets &amp; Roads</b>	<b>2,016,873</b>	<b>2,131,578</b>	<b>2,336,597</b>	<b>2,361,597</b>	<b>2,305,097</b>	<b>2,361,597</b>

## PUBLIC WORKS: Trees and Cemetery

### MISSION OF THE DIVISION

The Mission of this division is twofold: (1) to protect and keep in a healthy state an important public asset of the Town – the beautiful shade trees that are found in the Town’s public way and (2) the cemetery division staff provides compassionate, courteous and professional service to bereaved families and strives to maintain a tranquil, well-maintained environment with perpetual care and beautiful historic cemetery grounds.

**DESCRIPTION OF SERVICES**

The Trees and Cemetery Division is responsible for maintenance and interments at the Town’s five cemeteries. Tree responsibilities include maintenance and removal of trees in the public way, with attention to plantings, trimming, storm damage repairs, vandalism repairs, tree and stump removals, as well as care and watering of newly planted trees.

**STAFFING**

Division staffing includes a Foreman, one Crew Leader/Heavy Equipment Operator, two Heavy Equipment Operators, one Light Equipment Operator, one part-time clerical position, and one part-time summer help.

**FY08 GOALS AND INITIATIVES**

- Continue with perpetual care at all five cemeteries.
- Continue to maintain streetscapes
- Continue to clear intersections and walkways of brush to improve safety.

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Expanded New Town Cemetery.
- Expanded Mt. Pleasant Cemetery

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
Tree Removals	54	58
Interments	55	52
Cemetery Maintenance	27 Acres	31 Acres

**BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager’s Recommended Budget is higher than the Level Services Budget request by \$10,000, which funds the beginning of a “shade tree” planting program. The Town’s character is changing as dying trees are taken down for public safety reasons, however funding limitations have not allowed for their replacement.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets provide the same service levels as FY07, but with an increase in the cost of tree removal services from a contractor for the estimated same level of tree removal work.



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TREES &amp; CEMETERY</b>						
Non-Clerical	205,975	215,512	220,525	220,525	220,525	220,525
Overtime	8,638	8,638	8,638	8,638	8,638	8,638
Clerical	7,342	7,743	7,251	7,251	7,251	7,251
Summer help	4,872	4,872	5,018	5,018	5,018	5,018
<b>Sub Total: Personal Services</b>	<b>226,827</b>	<b>236,765</b>	<b>241,432</b>	<b>241,432</b>	<b>241,432</b>	<b>241,432</b>
Cemetery Materials	20,650	22,835	23,325	23,325	23,325	23,325
Tree Planting				10,000		10,000
Tree Contractors	40,000	46,200	64,890	64,890	59,890	64,890
<b>Sub-Total: Expenses</b>	<b>60,650</b>	<b>69,035</b>	<b>88,215</b>	<b>98,215</b>	<b>83,215</b>	<b>98,215</b>
<b>Total: Trees &amp; Cemetery</b>	<b>287,477</b>	<b>305,800</b>	<b>329,647</b>	<b>339,647</b>	<b>324,647</b>	<b>339,647</b>

## **PUBLIC WORKS: Parks and Grounds**

### **MISSION OF THE OFFICE**

The Mission of this division is to maintain landscaping throughout the Town in park and field areas, public right-of-ways and around all public buildings and school grounds.

### **DESCRIPTION OF SERVICES**

The Parks and Grounds division is responsible for maintenance of all Town parks, fields, and playgrounds. This includes Josiah Haynes, Peter Noyes, General John Nixon, Israel Loring, Ephraim Curtis Middle, Featherland Field, Davis Field, Frank Grinnell Veterans Memorial Park, Haskell Field, Fairbank Community Center, Frank G. Feeley Field, Cutting Field, Horse Pond Play Field, Heritage Park, Central Fire Station, North Fire Station, DPW Building, Police Station, Goodnow Library, Town Common, Frost Farm, Piper Farm, Meachen Field, Davis Farm, Barton Farm, Mahoney Farm and Carding Mill Conservation areas. Maintenance of these facilities includes mowing, aerating, fertilizing, irrigation, line striping and system maintenance, weed and insect control; litter clean-up, leaf removal, leveling, grading and marking fields, fence and vandalism repairs; shrub and tree care, and support for civic activities.

### **STAFFING**

Division staffing includes a Foreman, one Crew Leader/Assistant Mechanic, one Heavy Equipment Operator, one Light Equipment Operator, one part-time clerical position, and part-time summer help.

### **FY08 GOALS AND INITIATIVES**

- Continued maintenance of irrigation systems, athletic fields, conservation areas, school grounds and public parks and grounds.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Oversee a new contract for maintenance of school grounds.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
Mowing Conservation Land	50.0 Acres	81.0 Acres
Public Lands	94.5	94.5
Public Schools	33.57	33.57

### **BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is higher than the Level Services Budget request by \$13,430 to add to the current contract for periodic landscaping maintenance of the elementary schools so that certain Town buildings – the Goodnow Library, Fire Station, Police Station, and Town Hall. would get twice a year intensive cleaning, trimming, etc.. Similar attention already given to the school grounds has hugely improved their appearance. This line item increase would allow the same level of attention to the Town buildings.

Otherwise the Recommended Budget and the Level Services Budget keep the same level of service as FY07. The budget provides for funds to hire two more summer employees. The Town has acquired acres more of Conservation land in recent years, and mowing of this Conservation land in particular needs more attention than current staffing can provide.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PARKS &amp; GROUNDS</b>						
Non-Clerical	177,260	183,207	185,285	185,285	185,285	185,285
Overtime	3,100	3,120	3,120	3,120	3,120	3,120
Clerical	7,342	7,743	7,251	7,251	7,251	7,251
Summer help	8,717	8,717	17,957	17,957	8,979	17,957
Sick Leave Buy Back	2,129	2,408	2,480	2,480	2,480	2,480
<b>Sub Total: Personal Services</b>	<b>198,548</b>	<b>205,195</b>	<b>216,093</b>	<b>216,093</b>	<b>207,115</b>	<b>216,093</b>
Maintenance	25,640	54,260	59,400	72,830	59,400	72,830
Uniforms	2,800	2,800	3,000	3,000	3,000	3,000
<b>Sub Total: Expenses</b>	<b>28,440</b>	<b>57,060</b>	<b>62,400</b>	<b>75,830</b>	<b>62,400</b>	<b>75,830</b>
Capital Expense	7,268	7,268	7,268	7,268	7,268	7,268
<b>Sub Total: Capital Expenses</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>
<b>Total: Parks &amp; Grounds</b>	<b>234,256</b>	<b>269,523</b>	<b>285,761</b>	<b>299,191</b>	<b>276,783</b>	<b>299,191</b>

# HUMAN SERVICES



**Sudbury Senior Center at the  
Fairbank Community Building**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HUMAN SERVICES</b>						
Board of Health	344,099	351,743	376,621	376,620	359,468	376,620
Council on Aging	137,388	148,998	155,367	158,988	155,367	158,988
Youth Commission	37,973	39,549	42,507	42,507	42,007	42,507
Veterans Affairs	17,922	18,079	18,398	18,398	18,398	18,398
<b>Total Human Services</b>	<b>537,382</b>	<b>558,369</b>	<b>592,893</b>	<b>596,513</b>	<b>575,240</b>	<b>596,513</b>

**DESCRIPTION OF SERVICES**

The Board of Health is responsible for addressing the health needs of the community. Traditional duties include site evaluation for subsurface sewage disposal, permitting/licensing and inspections for food service establishments, summer camps, public swimming pools, stables, massage therapists, septic installers and haulers, septic system and private well installations, and supplying community nursing and mental healthcare services, as well as involvement in environmental health issues such as housing code violations, mosquito control, hazardous waste, animal/rabies control, public ground water supplies and emergency preparedness.

**STAFFING**

This department consists of the Health Director, two part-time social workers who job share, and a full-time office coordinator. Nursing, mental health, and senior outreach services are provided on a contract basis. Mosquito control is provided as part of a regional district, to which Sudbury pays an annual fee. The annual Household Hazardous Waste Day requires a licensed contractor for the collection. Animal/Rabies control services are provided through a contract as well.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None for this office

The Town Manager's Recommended Budget and the Level Services Budget includes funds for creation of a part-time shared analyst position to assist in the Health Office up to 15 hours per week, and also assist in the Conservation Department up to 15 hours per week. This is not included as a new initiative, but rather as a way to protect the level services capabilities of these two offices. Currently, each office has only one professional staff member, and when that person is out of the office or on vacation or out sick, there is no one else who can assist customers with their technical questions or issues. These two managers, (as well as the Assistant Town Manager/Personnel Director and the Finance Director/Treasurer-Collector – see their respective budgets), are the only department heads in the Town who have continued conducting the work of offices by themselves that in other towns of similar size and demands have two or even three professional staff members.

This bare bones staffing pattern has been on the priorities list to address as soon as the Town was able to deal with the staffing problems in the police, fire and DPW departments, which was accomplished in the FY06 and the FY07 budget. Reasons why this situation must be addressed in FY08:

1. Currently, each of these two managers spend far too much of their time on tasks that can be handled by someone at a lower grade, and higher level tasks get postponed or worse, finished by deadlines but in a hurried manner.
2. In the Health Department, the mandates from state and federal government in areas such as pandemic and hazardous materials planning, development of medical reserve programs and other preparations has become a near full-time job, leaving our current Health Director little time to be in the office or doing his soils testing work.
3. In the Conservation Office, the number of applications for permits, as well as inquiries from property owners has increased dramatically over recent years. Further the

complexity of projects has increased. Land is being developed now that was passed by in earlier years due to the amount of wetland or environmental sensitivity issues.

4. In both offices, the incumbents have worked for the Town for many years and are approaching ages where they may decide to retire. The Town needs back up both for when these individuals are out, but also to gain knowledge from the incumbents so that the Town is not left in a lurch if one of the department heads left the Town's employ.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BOARD OF HEALTH</b>						
Director	72,881	74,521	74,721	74,721	74,721	74,721
Town Social Worker	63,028	63,981	66,055	66,055	66,055	66,055
Non-Clerical	-	-	17,153	17,153	-	17,153
Clerical	39,168	38,842	40,007	40,007	40,007	40,007
Sick Buy Back	1,117	1,428	1,765	1,765	1,765	1,765
<b>Sub Total: Personal Services</b>	<b>176,194</b>	<b>178,772</b>	<b>199,702</b>	<b>199,701</b>	<b>182,549</b>	<b>199,701</b>
General Expense	1,900	1,900	1,900	1,900	1,900	1,900
Maintenance	100	100	100	100	100	100
Mental Health	29,560	29,560	29,560	29,560	29,560	29,560
Nursing Services	47,440	48,390	49,842	49,842	49,842	49,842
Contracted Services	9,800	10,900	10,900	10,900	10,900	10,900
Lab Expense	500	500	500	500	500	500
Hazardous Waste	17,000	18,700	18,700	18,700	18,700	18,700
Mosquito Control	40,780	41,596	44,092	44,092	44,092	44,092
Animal/ Rabies Control	8,600	8,600	8,600	8,600	8,600	8,600
Animal Inspector	1,725	1,725	1,725	1,725	1,725	1,725
Senior Outreach	6,000	6,500	7,500	7,500	7,500	7,500
Community Outreach Prog	4,500	4,500	3,500	3,500	3,500	3,500
<b>Sub Total: Expenses</b>	<b>167,905</b>	<b>172,971</b>	<b>176,919</b>	<b>176,919</b>	<b>176,919</b>	<b>176,919</b>
<b>Total: Board of Health</b>	<b>344,099</b>	<b>351,743</b>	<b>376,621</b>	<b>376,620</b>	<b>359,468</b>	<b>376,620</b>

## **HUMAN SERVICES: Council on Aging**

### **MISSION OF THE DEPARTMENT**

The mission of the Council on Aging (COA) is dedicated to serving the social, recreational, health and educational needs of older adults in the community. The Sudbury Senior Center has been a fully accredited center since December 2003; one of only seven in Massachusetts.

### **DESCRIPTION OF SERVICES**

The Council on Aging supports programs at the Sudbury Senior Center, provides van services for elders, serves as an information resource for seniors and their families, coordinates numerous volunteer services to elders in the community, and plays an advocacy role for seniors at the local, state, and federal level.

### **STAFFING**

The department currently consists of the Council on Aging Director, a 30 hour a week van driver, a full-time senior clerk and a part-time Information and Referral Specialist, all appointed by the Town Manager. In addition, many Sudbury residents volunteer countless hours helping to run the many programs at the Senior Center. The activities of the COA are overseen by a nine member volunteer Council on Aging, appointed by the Board of Selectmen.

### **FY08 GOALS AND INITIATIVES**

- Continue to increase transportation options for Sudbury seniors
- Work with other Town officials to develop a mechanism to allow Sudbury residents to donate funds to assist Seniors with property tax burdens
- Reach out to identify and make contact with all Sudbury residents aged 85 and older to offer services, support, and inclusion on the Emergency Assistance List
- Involve younger seniors in services and programming through multiple media avenues
- Serve as part of the Town's Emergency Planning efforts to develop an emergency response plan for seniors and people with disabilities who may be placed at risk due to weather or other events, including facilitating a subcommittee of the LEPC to coordinate the efforts of the senior housing communities and other town entities toward emergency planning.
- Survey people 50 and older who sell their homes to learn to what an extent property tax increases were a factor in a decision to leave Sudbury.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- The Director received Director Certification from the Massachusetts Association of Councils on Aging
- Worked with the Commission on Disabilities to promote advocacy for equal access for residents with disabilities
- Continued several initiatives to increase transportation alternatives for Sudbury seniors and those with disabilities, including implementing a new taxi voucher program, receiving a grant for a new Senior Center van, and working with the Town of Wayland to develop a two-town transportation collaborative and applying for a grant to hire a consultant for this project.
- Increased publicizing of Senior Center program offerings through press releases and website postings.

- Worked on monitoring and encouraging the development of property tax relief efforts for Seniors
- Working with the Sudbury police, fire, and public health departments, developed an Emergency Assistance List for residents who would like to be called in times of emergency.

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
<b>Value of Volunteer Services</b>		
Hours	<b>7,600</b>	<b>8,357</b>
Dollar equivalent (per EOE formula)	<b>\$126,000</b>	<b>\$166,885</b>
<b>Program Attendance</b>	<b>1,880</b>	<b>2,100</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: Adding five hours for the Van Driver. Increasing the van driver's hours from 30 to 35 a week will provide greater transportation access for seniors and people with disabilities.

Under the Level Services Budget, the additional 5 hours for the Van Driver are not included.

The COA will continue to have to be very frugal under this budget, but will be able to maintain appropriate service levels.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>COUNCIL ON AGING</b>						
Director	53,743	58,825	61,846	61,846	61,846	61,846
Van Driver	25,674	25,027	26,781	30,401	26,781	30,401
Clerical	32,837	33,330	34,330	34,330	34,330	34,330
Information/Reference	18,134	19,816	20,410	20,410	20,410	20,410
<b>Sub Total: Personal Services</b>	<b>130,388</b>	<b>136,998</b>	<b>143,367</b>	<b>146,988</b>	<b>143,367</b>	<b>146,988</b>
General Expense	7,000	7,000	7,000	7,000	7,000	7,000
Contracted Services	-	5,000	5,000	5,000	5,000	5,000
<b>Sub Total: Expenses</b>	<b>7,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>
<b>Total: Council on Aging</b>	<b>137,388</b>	<b>148,998</b>	<b>155,367</b>	<b>158,988</b>	<b>155,367</b>	<b>158,988</b>



## **HUMAN SERVICES: Youth Commission**

### **MISSION OF THE OFFICE**

The mission of the Sudbury Youth Coordinator Department is to provide youth with activities that are appealing, safe, easily accessible and ultimately empowering. The goal is to also offer support and education to the parents of the community. Communication with students, parents, youth boards, and established groups is vital to providing these activities.

### **DESCRIPTION OF SERVICES**

The Youth Commission is responsible for addressing youth needs and concerns in the community. The population of the youth of Sudbury is growing. Now more than ever the community needs to provide for our youth. This division of the Town provides programs and activities that are safe as well as educational during the so-called non-learning hours.

Programs run by the Youth Coordinator include the Youth Action Committee, which works with the Youth Coordinator to run Coffee Houses at the LSRHS. These coffee houses are safe and positive events for older teens and the teens use the coffee houses to raise funds for charity. At the middle school level there are after school programs run by the Youth Coordinator as well as Park and Recreation programs designed for this age group. A middle school youth group has also been organized to help the Youth Coordinator generate ideas that will lead to more programming. Community service programming is also a focus for this age group. Some of the activities being offered are fall clean-up for Musketahquid Village in Sudbury, preparing a meal for the Salvation Army, and a joint venture with the Sudbury Veterans Agent to clean the gravesites of local veterans'.

### **STAFFING**

Staffing in this department consists of a full-time Youth Coordinator. She has clerical assistance from the Park and Recreation Administrative Assistant to the Park and Recreation Director and the Atkinson Pool front desk. The Youth Coordinator reports to the Park and Recreation Director.

### **FY08 GOALS AND INITIATIVES**

- Increase the number of Park and Recreation classes for Middle and High School aged residents.
- Work with the Youth Action Committee and Lincoln-Sudbury to improve the way information about community service is distributed.
- Work with the Senior Center on shared spacing issues
- Continue to expand summer program offerings

### **FY 06/07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Expanded summer programs to offer full week activities and options for High School Students (07)
- Create a pamphlet for 6th Grade parents that helped prepare them for the transition their child faced from elementary school to middle school (07)
- Offered an Internet Safety workshop for parents, co-sponsored by Curtis Middle School (06)

- Offered more community service opportunities (07)

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>6<sup>th</sup> Grade Pool Party</b>	<b>75 attended</b>	<b>98 attended</b>
<b>Coffee Houses</b>	<b>200 on average</b>	<b>85-325 attended</b>
<b>Get on the Bus Summer Program</b>	<b>0</b>	<b>5-15 per trip</b>
<b>Vacation Programs</b>	<b>8-25 per trip</b>	<b>5-17per trip</b>
<b>Internet Safety Workshop for Parents</b>	<b>0</b>	<b>40 attended</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget is the same as the Level Services Budget. No new initiatives are planned for this budget, but funds are included to continue the same level of activity and programming current successfully delivered.

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town Mgr 3% Budget FY08</b>	<b>Town Mgr Request FY08</b>
<b>YOUTH COMMISSION</b>						
Youth Coordinator	33,923	34,999	37,457	37,457	37,457	37,457
<b>Sub Total: Personal Services</b>	<b>33,923</b>	<b>34,999</b>	<b>37,457</b>	<b>37,457</b>	<b>37,457</b>	<b>37,457</b>
General Expense	450	450	450	450	450	450
Youth Programs	2,000	2,000	2,000	2,000	2,000	2,000
Professional Development	100	100	100	100	100	100
Travel	500	500	500	500	500	500
Transportation	1,000	1,500	2,000	2,000	1,500	2,000
<b>Sub Total: Expenses</b>	<b>4,050</b>	<b>4,550</b>	<b>5,050</b>	<b>5,050</b>	<b>4,550</b>	<b>5,050</b>
<b>Total: Youth Commission</b>	<b>37,973</b>	<b>39,549</b>	<b>42,507</b>	<b>42,507</b>	<b>42,007</b>	<b>42,507</b>

## HUMAN SERVICES: Veterans' Affairs

### MISSION OF THE OFFICE

The Mission of the Veterans' Affairs office is to help address the needs of Town veterans, widows, and families of the armed services.

### DESCRIPTION OF SERVICES

The Agent assists veterans in receiving State and Federal services as well as serves as the Veterans' Graves Agent.

### BUDGET ISSUES

New Budget Initiatives for FY08: None for this Office

The Town Manager's Recommended Budget requests assistance funds for one resident who is currently receiving benefits. If more residents request or need assistance, transfers will be requested from the Reserve Fund. The adequacy of this budget will depend on the needs of the veterans in the Town. As in past years, due to the unpredictability of this need, funds have been allocated into the Reserve Fund for any potential needs that arise.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>VETERANS AFFAIRS</b>						
Veteran Agent	10,472	10,629	10,948	10,948	10,948	10,948
<b>Sub Total: Personal Services</b>	<b>10,472</b>	<b>10,629</b>	<b>10,948</b>	<b>10,948</b>	<b>10,948</b>	<b>10,948</b>
General Expense	1,400	1,400	1,400	1,400	1,400	1,400
Veteran's Grave Markers	850	850	850	850	850	850
Veteran's Benefits	5,200	5,200	5,200	5,200	5,200	5,200
<b>Sub Total: Expenses</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>
<b>Total: Veterans Affairs</b>	<b>17,922</b>	<b>18,079</b>	<b>18,398</b>	<b>18,398</b>	<b>18,398</b>	<b>18,398</b>

# CULTURE & RECREATIONAL SERVICES



**Goodnow Library**

**Hosmer House**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>CULTURE &amp; RECREATION</b>						
Goodnow Library	868,222	893,408	924,652	1,013,412	924,652	1,013,412
Recreation	117,740	124,271	124,950	191,650	124,951	144,865
Historical Commission	5,950	5,950	5,950	5,950	5,950	5,950
Historical Districts Commission	2,330	4,043	3,095	3,095	3,095	3,095
<b>Total Culture &amp; Recreation</b>	<b>994,242</b>	<b>1,027,672</b>	<b>1,058,648</b>	<b>1,214,107</b>	<b>1,058,647</b>	<b>1,167,322</b>

## CULTURE & RECREATION: Goodnow Library

### MISSION OF THE DEPARTMENT

The Goodnow Library is a lifelong recreational and learning/information resource and community center for Sudbury. The library assists users of all ages and interests in meeting personal, educational, vocational and social goals that contribute to their well being and to reaching their potential as individuals and as members of a democratic society. Goodnow strives to enhance the quality of life of all users, to strengthen the fabric of the Sudbury community and to promote a well informed and enlightened citizenry.

Goodnow's mission is to provide convenient and effective access to a wide array of print and electronic resources, direct and remote services and facilities relevant to the diverse recreational, informational, educational, social and cultural interests of the community. The Library also serves as a point of access (gateway) to materials and services beyond those it is able to offer locally. The trustees and staff strive to create a welcoming, stimulating and comfortable environment for people of all ages, interests and abilities. The Library emphasizes personal service, innovation, collaboration and cost effectiveness in carrying out its mission.

### DESCRIPTION OF SERVICES

The Goodnow Library is an automated library, a member of the Minuteman Library Network. The Library carries out five primary service roles in Sudbury. Its most prominent role is that of **Popular Materials Center**. From leisure reading to pursuing hobbies and cultural interests, use of library resources and activities is increasing for all ages. Acquiring sufficient print and non-print material to satisfy recreational and other leisure time interests is an on-going challenge.

As a **Formal Education and an Independent Learning Center**, Goodnow supports the personal learning and formal educational pursuits of residents. From strengthening job skills, researching consumer, health and financial information, to completing school assignments, the information and education needs of residents are expanding and becoming more sophisticated and diverse. They require a wider variety of library resources, skills, and services than ever before. (Nine years ago the library offered one public computer station; today it offers twenty-five, as well as a wireless network and popular web site.) Evaluating and integrating relevant emerging technologies into the Library's plan of service has become a major responsibility. The Library's participation in the Minuteman Library Network and its emphasis on Reference and Reader Advisory services exemplify its commitment to these important roles.

The significant growth in pre-school and early school age population in Sudbury has an impact on each of these roles. In recent years the Library has committed more resources towards being a **Pre-School Door to Learning** for younger children. It has introduced programs and resources to encourage and reinforce reading, listening and socializing skills to toddlers.

Goodnow's fifth role is as a **Community Center**. The Goodnow Library facility is used as a community meeting place ("commons") for socializing and sharing experiences and ideas. It is also a valued resource for individual pursuits. An estimated 200,000 plus

individuals visit Goodnow annually. Hundreds of meetings take place at Goodnow each year. Staff manages the facility's community resources – meeting rooms, audio-video system, exhibit and display areas, and supports the programming efforts of the Friends of the Goodnow Library. The Friends sponsor and present a wide variety of adult programs to the community. The Children's Department offers many regularly scheduled reading, story telling and craft programs. Special children's programs are planned by staff and funded by the Friends.

## **STAFFING**

Staffing consists of 4 full-time positions (Director, Assistant Director, Head of Circulation, and Children's Librarian), 22 adult part-time positions, 5 high school page positions, and 22 volunteers. The Library is open Monday – Wednesday 9 am to 9 pm; Thursday – Saturday 9 am to 5 pm; Sunday 2 pm – 5 pm.

The latest statewide public library reports show that Goodnow remains one of the busiest and most cost effective libraries in Massachusetts – supporting exceptionally high circulation (340,000) with a relatively small staff (14.6 FTE). Its ratio of circulations per full time equivalency is among the highest. Staffing at Goodnow is approximately 4 FTE's (140 fewer staff hours per week) than the average staffing of comparable libraries – libraries serving similar communities (size and make-up) with especially high activity. Staffing the Library at a level sufficient to support the community's exceptional use of library resources and services is an ever present challenge. The Library has consistently accepted the challenge of doing more with less by focusing on basic library services, capitalizing on efficiencies from automation and telecommunication, expanding a dedicated group of volunteers, working with the Friends of the Library, collaborating with other libraries and streamlining operations. However, as noted below, additional direct staff support is required to sustain the library. As part of its new Strategic Plan 2007-2010, Goodnow is requesting support for increasing staff in key areas: hours, core services and support staff.

## **FY07 GOALS**

- Implement Strategic Plan. Solicit input from Friends and Town Manager for final version. Present to Selectmen and community. Undertake goals/activities scheduled for 2007, including budget requests for FY08.
- Establish more effective communication and collaboration with school systems.
- Establish a pilot English conversation group to support residents interested in improving basic English speaking and listening skills. Rely on volunteers to run group.
- Continue to expand web services and resources offered through the Library's web site.
- Continue to evaluate RFID technology – self checkout and automatic check-in library system.
- Work with COA and others (volunteers) to offer delivery of library materials to homebound.

## **FY05/06 GOALS**

- a) Completed a draft for a new Strategic Plan: reviewed mission, evaluated data, conducted community survey, assessed strengths, weaknesses, opportunities and threats, and established goals for 2007-2010. The trustees approved a final draft of the plan in June, 2006.
- b) Received a grant from the Sudbury Foundation to continue the Sudbury Archives project. Over the next three years we will be incorporating historical records from 1850

- 1900 and enhancing the web site with features that will support the local history activities of the Sudbury school systems. We are coordinating this activity with the Town school system.
- c) Restored the evening hours lost 12 years ago. The Monday-Wednesday schedule added back 8:30 -9 p.m. to the evening schedule.
- d) Converted the Adult Services position into Assistant Director's position. Town supported adding part-time reference staff hours to make this possible.
- e) Enhanced the library resources and services available to the community through the Web -one of our most important on-going goals. We are establishing Goodnow's web site as Sudbury's digital branch library - a few key strokes away 24/7. We added a number of valuable remote access subscription databases in FY05 and 06. For example, Sudbury residents gained on-line access to approximately 1200 digitized adult audio book titles (best-sellers, book club favorites, and award-winners), 250 children's and young adult titles (Newbery and Caldecott winners and time-tested classics) and a large variety of foreign language courses. Each month bestsellers and classic are added. Using their Goodnow card, a Sudbury resident can download a tape from anywhere at any time. Users also gained the ability to reserve museum passes on-line.
- In addition to new subscription databases, Assistant Director Karen Tobin worked with staff to customize and create web resources for users. For instance, she and the Young Adult/Reference Librarian, Krista Armstrong-Moon, created two web pages for young adults - Homework Help and Looking for a Good Book?
- f) Strengthened young adult collections. Increased spending on young adult materials and saw a 20 percent increase in circulation.
- g) Evaluation of RFID technology – self checkout and automatic check-in library system.
- h) Established toddler story time.
- i) Painted exterior of 19th century wing.
- j) Added shelving in key areas of the Library.

#### **PERFORMANCE/WORKLOAD INDICATORS**

- Circulation up almost 70% over 8 years; 8% last year to over 340,000 annually
- Reference services up 60% over 15 years
- Resource sharing up 400% over 5 years – 60,000 annually
- Increase in services and responsibilities associated with supporting 41 user/staff PCs and a wireless network, maintaining a 32,000 sq. ft. facility that has more than 200,000 visitors a year, and developing Goodnow's electronic branch library (web site) with 148,000 visitors last year.

<b>Indicator</b>	<b>2004</b>	<b>2005</b>
<b>Circulation</b>	<b>304,629</b>	<b>340,585</b>
<b>Children's Programs</b>	<b>268</b>	<b>266</b>
<b>Children's Program Attendance</b>	<b>3,500</b>	<b>3,500</b>
<b>Meeting Rooms Use</b>		
<b>Meetings</b>	<b>233</b>	<b>245</b>
<b>Attendance</b>	<b>5,274</b>	<b>5,382</b>
<b>Library Visitors</b>	<b>200,000</b>	<b>200,000</b>
<b>Library Web Site Visitors</b>	<b>91,771</b>	<b>148,287</b>
<b>Resource Sharing</b>	<b>48,000</b>	<b>60,000</b>
<b>Reference/Advisory Questions</b>	<b>19,000</b>	<b>19,000</b>

## BUDGET ISSUES

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is \$88,760 over the Level Services Budget. This increase in funding is the recommended level to achieve the goals defined by Goodnow's new Strategic Plan. The plan has been a two year effort. In addition to gathering local and comparative library data and soliciting input from staff, trustees, Friends and the Town Manager, the plan incorporates much of the information derived from a community survey on library services and resources. The recommendations for the Library fall into three categories: additional weekend and evening hours, effective support for core services and operations and increased purchasing power –books, audio-visual materials and electronic resources. The requests are consistent with past requests for additional support in these key areas.

1. Additional Weekend/Evening Hours: request 37 additional part-time hours to add Thursday evening (5-9) and Friday evening (5-6), restore a Sunday afternoon hour (1-2) and add three Sundays to the library schedule. As part of this proposal, three staff hours will be added to Saturday coverage to provide lunch coverage at each service desk and six page hours will be added evenings to keep up with shelving material. Most of the staff hours go to the lowest paid positions – Page and P-T Library Clerks. Cost: \$29,051. Evenings and weekends are extremely busy-working adults, families and students. Adding evening and weekend hours was the most frequent request of the community survey responses. In fact, these hours have been requested by users and the library for many years. Most of the surrounding towns are open four evenings. The Sunday afternoon hour (1-2) was lost twelve years ago due to budget reductions. Adding three Sundays to the schedule allows us to be open on Sundays throughout the school year.
2. Provide appropriate staffing to maintain core customer services: request 42 additional part-time hours to create effective and efficient support for the core services listed below. The hours will be distributed to four service areas. Eighty-four percent of the hours will be allocated to Library Clerks –lowest paid adult position. Cost: \$41,356.
  - a) Circulation and Children's desk services – add to weekday desk coverage at most critical times when one person is insufficient to manage desk services.
  - b) Youth Services. Provide Children's librarian, Assistant Children's librarian and Young Adult/Reference librarian with off desk time to meet with students, teachers and school librarians to better coordinate support for school assignments and to develop reading lists and guides—in print and on line. Allow library to expand children's and young adult book discussion programs.
  - c) Collection Development. Provide several staff members with a few off desk hours to create and analyze MLN collection reports to identify weak/dated and high demand collection areas and review selection tools for purchasing material. This will result in better decisions and turn around time for acquiring material.
  - d) Technical Services. There is a constant backlog of material to be cataloged and processed. The library needs to increase hours for cataloging and processing new materials and donations, mending items, cataloging, processing and preserving archival materials, and labeling materials to make them more accessible.
3. Increase Library Materials Budget: increase of \$12,000 to meet the community's extraordinary demand for library materials. This request is based on our circulation



and resource sharing figures, daily exchanges with residents and community survey responses. The survey documented a strong interest in improving depth, variety and currency of Children's, Young Adult, Adult Fiction and Non-Fiction and Reference resources in key areas. Our budget is lower than comparable libraries -10-20 percent.

4. Support Services: 14 additional page hours for shelving materials, maintaining shelf order, emptying book drops, and checking in material behind the scenes. Handle more than 400,000 items a year. Our goal is to use the lowest paid position as part of the answer to improving staff support. We have three fewer page hours now than in FY88 when circulation was less than half of current total. Cost: \$6,353.

On the other hand, the Level Services budget accomplishes none of these goals. Library Materials (\$6,250), Building Maintenance (\$1,100) and Automation (\$2,340) increases are due to cost increase to maintain level service in these areas. The average price for books and other library materials rose by 5 percent. The Automation increase reflects a six percent increase in Minuteman Library Network membership fees. The increase in Travel is offset by reductions in General Expenses -\$400.

The Level Services budget does not add hours to the library's schedule. It does not increase its book purchasing power or meet pressing staffing needs, such as service desk coverage, collection development, cataloging/processing and youth services. Goodnow is below comparable libraries in these areas. Since use of the library continues to grow, this budget does not maintain the status quo.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>GOODNOW LIBRARY</b>						
Library Director	79,378	81,164	81,364	81,364	81,364	81,364
Non-Clerical	482,171	485,809	506,191	582,951	506,191	582,951
Overtime	14,388	14,620	15,511	15,511	15,511	15,511
Custodial		-	-	-	-	-
Sick Leave Buy Back	2,657	2,698	2,779	2,779	2,779	2,779
<b>Sub Total: Personal Services</b>	<b>578,594</b>	<b>584,291</b>	<b>605,845</b>	<b>682,605</b>	<b>605,845</b>	<b>682,605</b>
General Expense	10,487	10,337	9,937	9,937	9,937	9,937
Automation	37,600	38,860	41,200	41,200	41,200	41,200
Books and Materials	117,000	124,900	131,150	143,150	131,150	143,150
Maintenance	86,960	21,960	23,060	23,060	23,060	23,060
Utilities	-	71,600	71,600	71,600	71,600	71,600
Travel	250	400	800	800	800	800
Contracted Services	37,331	41,060	41,060	41,060	41,060	41,060
<b>Sub Total: Expenses</b>	<b>289,628</b>	<b>309,117</b>	<b>318,807</b>	<b>330,807</b>	<b>318,807</b>	<b>330,807</b>
<b>Total: Goodnow Library</b>	<b>868,222</b>	<b>893,408</b>	<b>924,652</b>	<b>1,013,412</b>	<b>924,652</b>	<b>1,013,412</b>

## **CULTURE & RECREATION: Park & Recreation**

### **MISSION OF THE OFFICE**

The Mission of The Sudbury Park & Recreation Department is to provide recreation activities, leisure services, facilities and general amenities to the public. To enhance the quality of life for the Town of Sudbury residents by providing clean, safe and attractive parks and recreation facilities that promote a strong sense of community.

### **DESCRIPTION OF SERVICES**

The Park and Recreation Department offers a comprehensive and varied program of public recreation activities, services, and resources for Sudbury residents. Programs are self-sustaining and offer an opportunity for quality use of leisure time in a productive and healthy manner. A brochure is mailed to all in our database Five times a year with information on recreation, teen center, Youth Programs and Atkinson pool programs. Facilities include Atkinson Pool, Fairbank Community Center, Toddler playground, tennis courts, basketball courts, sand volleyball courts, outdoor skating area (weather permitting), and fields for baseball, field hockey, lacrosse, softball, and soccer. Major areas include Davis Field, Featherland Park, Frank G. Feeley Field, Cutting Field (Turf Field) and the Haskell Recreation area.

### **STAFFING**

The department covered by this budget consists of a full-time Recreation Director, an office coordinator, a program coordinator and a part-time teen center coordinator. A pre-school coordinator and many program staff, mostly part-time, are also part of the staff but they are paid out of revolving funds, which covers their salaries and benefits. Currently, only approximately half of the office coordinator and program coordinator's salary is paid out of the Town's budget, the rest are charged to the revolving funds.

### **FY08 GOALS AND INITIATIVES**

- Create an IPM Plan for the Town Fields
- Completion of the LS-Community Field project
- Continue efforts to bring financial stability and predictability to the Atkinson Park and Recreation Department
- Create RFP for the Development of Mahoney and Malone property.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continue efforts to bring financial stability and predictability to the Atkinson Pool and Park and Recreation Department.
- We have secured funding for field master plan from the CPC and Capital development user fees for Mahoney and Malone.
- Worked with the Town Manger to secure additional field funding and work on ways to organize the three main departments to serve the community better. This was done by privatizing some duties securing better equipment.
- Completion of the Cutting Field Project

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
<b>Park &amp; Recreation Programs offered</b>	<b>694</b>	<b>749</b>
<b>Activity Participants</b>	<b>7,724</b>	<b>7,634</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager’s Recommended Budget maintains the Department’s ability to provide the current level of services by adding an additional 15 hours to the Program Coordinator’s position so that it is paid entirely out of the Town’s budget. The cost to the Town for this enhancement is just under \$20,000 for FY08. The change is recommended because this position continues to be responsible for more activities than what can be funded by user fees, and has become part of the overall management of the department.

The Town Manager’s Level Services Budget does not include this change, and funds the same level of staffing as currently exists in the department.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>RECREATION</b>						
Recreation Director	67,379	71,595	71,595	71,595	71,595	71,595
Non-Clerical	15,200	15,100	15,650	62,435	15,650	15,650
Program Coordinator	20,149	21,246	20,259	40,173	20,259	40,173
Clerical	15,012	15,830	16,947	16,947	16,947	16,947
<b>Sub Total: Personal Services</b>	<b>117,740</b>	<b>123,771</b>	<b>124,450</b>	<b>191,150</b>	<b>124,451</b>	<b>144,365</b>
Travel	-	250	250	250	250	250
Uniforms	-	250	250	250	250	250
<b>Sub Total: Expenses</b>	<b>-</b>	<b>500</b>	<b>500</b>	<b>500</b>	<b>500</b>	<b>500</b>
<b>Total: Recreation</b>	<b>117,740</b>	<b>124,271</b>	<b>124,950</b>	<b>191,650</b>	<b>124,951</b>	<b>144,865</b>

**CULTURE & RECREATION: Historical Commission**

**MISSION OF THE PROGRAM**

The Historical Commission is responsible for oversight of the following Town-owned historic properties: the Hosmer House, Loring Parsonage, Haynes-Garrison site, and the Soldier's Training Field and works with the Town Manager to plan and implement efforts to maintain and protect these properties. In addition, the Commission maintains records for the Massachusetts Historical Commission.

**DESCRIPTION OF SERVICES**

The Historical Commission plan and carry out a variety of activities to help the community of Sudbury enjoy the Hosmer House and other historic properties owned by the Town. In recent year, the Commission has been requesting funds from the Community Preservation Act to implement various projects affecting the historic properties of the town.

**STAFFING**

The Commission receives no staffing from the Town, and maintains the Hosmer House with volunteers.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget is exactly the same as the FY07 appropriated budget. Funds were approved through the Community Preservation Act (CPA) for a major restoration of the Hosmer House, so the Town Manager's Recommended Budget should be adequate for their other needs. No additional funds are requested for this department beyond the Town Manager's Recommended Budget amount.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HISTORICAL COMMISSION</b>						
General Expenses	5,950	5,950	5,950	5,950	5,950	5,950
<b>Sub Total: Expenses</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>
<b>Total: Historical Commission</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>

**CULTURE & RECREATION: Historic Districts Commission**

**MISSION OF THE OFFICE**

The Historic Districts Commission is responsible for assuring the appropriateness of building improvement in the Town’s Historic Districts.

**DESCRIPTION OF SERVICES**

Upon request from homeowners in three historic districts, the Commission approves Certificates of Appropriateness for construction, paint colors, and demolition.

**STAFFING** Staffing is provided by a part-time clerical position.

**FY06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Extended the King Philip Historic District to include the Post Road at Mill Village and Concord Road at Codjer Lane.
- Maps and guidelines were mailed to homeowners and businesses in the historic district and to all Sudbury realtors.

**FY07/08 MAJOR INITIATIVES**

- Continue monitoring all historic districts for appropriate construction, paint colors, and demolition
- Issue certificates of appropriateness

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget is the same as FY07, except for the reduction in general expense to FY06 level. Additional funds were required in the FY07 to obtain and install six new signs indicating the location of the enlarged historic districts, per the vote of Town Meeting in 2005. The Town Manager’s Recommended Budget maintains the Department’s ability to provide the current level of services, but does not address the increased hours for the part-time clerk that the Commission has been seeking in recent years.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HISTORIC DISTRICTS COMMISSION</b>						
Clerical	1,880	2,568	2,645	2,645	2,645	2,645
<b>Sub Total: Personal Services</b>	<b>1,880</b>	<b>2,568</b>	<b>2,645</b>	<b>2,645</b>	<b>2,645</b>	<b>2,645</b>
General Expenses	450	1,475	450	450	450	450
<b>Sub Total: Expenses</b>	<b>450</b>	<b>1,475</b>	<b>450</b>	<b>450</b>	<b>450</b>	<b>450</b>
<b>Total: Hist Dist Commission</b>	<b>2,330</b>	<b>4,043</b>	<b>3,095</b>	<b>3,095</b>	<b>3,095</b>	<b>3,095</b>

# UNCLASSIFIED AND TRANSFER EXPENSES



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN-WIDE OPERATIONS &amp; TRANSFER ACCOUNTS</b>						
Town-wide Operating Expenses	113,345	103,545	100,700	100,700	99,700	100,700
Transfer Accounts	200,000	318,274	351,574	351,574	351,574	351,574
<b>Total Town Mgr-wide &amp; Transfers</b>	<b>313,345</b>	<b>421,819</b>	<b>452,274</b>	<b>452,274</b>	<b>451,274</b>	<b>452,274</b>

## **UNCLASSIFIED – Town Wide Operating Expenses**

### **MISSION OF THE PROGRAM**

This budget provides a place to budget for those costs that do not fit precisely into other cost centers and are shared by many departments.

### **DESCRIPTION OF SERVICES**

Expenses are included for copiers, postage, telephone, the Town Report, Town Meeting, and the July 4<sup>th</sup> parade. All spending from this budget requires the approval of the Town Manager.

### **FY08 GOALS AND INITIATIVES**

- Continue efforts to implement electronic filing and records maintenance and reduce the number of photocopies that are made when sharing files and information
- Continue ongoing program of producing an all electronic file for printing the Town Report and the Annual Town Meeting Warrant
- Support work of the Technology Department in implementing new VOIP phone system in Town buildings
- Explore ways to produce paperless agenda packets for Selectmen's meetings

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continued to keep postage budget level funded due to use of technology for delivery of information
- Continued with quality and content of Town Report & Town Warrant
- 

### **BUDGET ISSUES**

- Postage: Anticipating a small decrease due to new WOW (weigh on the way) technology
- Memorial Day: The committee has requested a slight increase

We hope that these amounts will be sufficient for copiers, postage, telephone and equipment. For Town Report, the Town Report Committee will have to make choices on assembling and printing the Report. Many factors affect cost – the length of the report, the quality of the stock, etc. The Committee will have to manage within their budgeted amounts. The costs of putting on Town Meetings are budgeted on the Town side of operations, yet we have little control over the number of meetings and their length.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN-WIDE OPERATING EXPENSES</b>						
Copiers: Supplies & Service	8,000	8,000	8,000	8,000	8,000	8,000
Postage	42,000	42,000	39,000	39,000	38,000	39,000
Telephone	20,000	20,000	20,000	20,000	20,000	20,000
Print Town Mgr Report	9,500	9,500	9,500	9,500	9,500	9,500
Town Mgr Meetings and Elections	18,000	18,000	18,000	18,000	18,000	18,000
Memorial Day	2,045	2,045	2,200	2,200	2,200	2,200
July 4th Celebration	4,000	4,000	4,000	4,000	4,000	4,000
Equipment	9,800	-	-	-	-	-
<b>Total: Operating Expenses</b>	<b>113,345</b>	<b>103,545</b>	<b>100,700</b>	<b>100,700</b>	<b>99,700</b>	<b>100,700</b>



## **UNCLASSIFIED: Transfer Accounts**

### **MISSION OF THE PROGRAM**

Annual Town Meeting is the appropriating body for the Town budget, and yet unless a special need arises; it meets only in April of each year. The School Departments have the ability to move funds around within their appropriation. The two transfer accounts provided for here provide the Town side of government with reserves to rely on should the need arise during the year.

### **DESCRIPTION OF SERVICES**

This budget has two components for unknown costs facing the Town Departments: the reserve fund and a salary contingency fund for any salary negotiations that are in progress during the year, as well as for adjustments that may be needed during the year.

### **BUDGET ISSUES: Reserve Fund**

Same level as budgeted for in FY07. As always, there are calculated risks the Town runs in making various budget decisions, and it is in this Reserve Fund we set aside funding to cover ourselves for all of those risks, such as:

1. **Legal expenses:** Funding for the law budget is set at a minimum level, but it is likely the Town will either be sued or will initiate legal proceedings to protect its rights and to defend the decisions of its Boards and Commissions.
2. **Equipment failure:** the Town relies on aging equipment. Items such as boilers in buildings, and some trucks and heavy equipment are currently beyond their useful life, but we have not been able to budget to replace them. If a failure occurs during the fiscal year we look to this fund for replacement.
3. **Snow and Ice Removal costs:** It is impossible to budget accurately for the costs of snow and ice removal. Per state law, we budget the minimum and if that amount is exceeded, we look to the reserve fund to cover any overages.
4. **Veterans' benefits:** The Town is required to pay for such benefits, but at budget preparation time we do not have any sense of how many veterans might need assistance. Thus, we keep funds against that possibility in the Reserve Fund.
5. **Fire and Police department staff injuries.** In these two critical departments, lengthy health related absences create the demand for shifts to be filled through overtime. We do not budget for this possibility in these departments, but instead assume that all employees will be healthy and able to work all scheduled shifts. But too often a long-term injury or illness does occur, and reserve fund transfers are needed to cover these overtime costs.
6. **The unexpected:** With every department's budget so tight, there is nowhere else to look for any unexpected costs that must be paid.

The reserve fund amount is slightly over 1% of the total Town budget; and that is about half what most towns of Sudbury's size keep in a Reserve Fund. As Finance Committee approval is needed to spend the money in this fund, Town Meeting can be sure this is a critical part of providing for the continued safe operation of Town departments.

### **BUDGET ISSUES: Salary Contingency Fund**

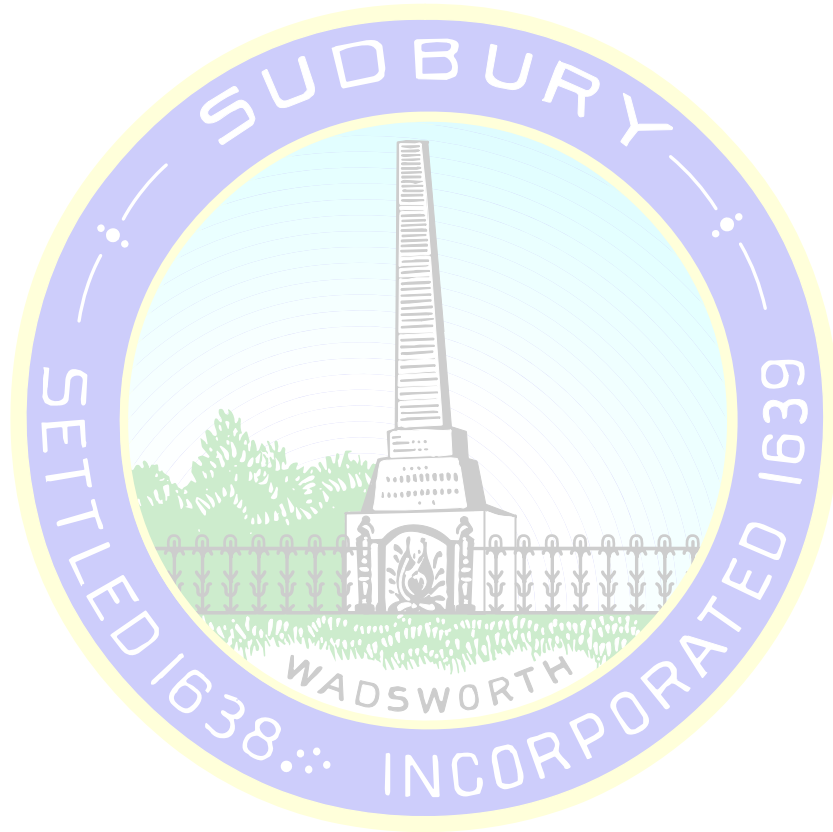
Same level as budgeted for in FY07. All Town bargaining groups have yet to settle contracts for FY08: Police, Fire, Highway, Engineering and the supervisory association. This account is also needed for unexpected personnel changes that can happen during

the fiscal year. Often a salary adjustment is needed if a job description changes and the reclassification puts the position at a higher pay grid, or an employee at a low step is replaced by one at a higher step. Finally, this account is used when a department has miscalculated the amounts due to an employee. While this doesn't happen often, there have been times a benefit was overlooked for an employee, such as a newly earned longevity payment or a sick leave buy back amount. This account allows for those small variations.

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town Mgr 3% Budget FY08</b>	<b>Town Mgr Request FY08</b>
<b>TRANSFER ACCOUNTS</b>						
Reserve Fund	135,000	145,000	145,000	145,000	145,000	145,000
Town Non-Clerical Contingency	65,000	173,274	206,574	206,574	206,574	206,574
<b>Total: Transfer Accounts</b>	<b>200,000</b>	<b>318,274</b>	<b>351,574</b>	<b>351,574</b>	<b>351,574</b>	<b>351,574</b>

# Section Four

## TOWN OPERATING DEPARTMENTS



# Town Manager's FY08 Recommended Budget for Town Operating Departments

This ***FY08 Recommended Budget for Town Operating Departments*** that I am recommending for approval by the Finance Committee is a level of funding that should ensure the same level of public safety, protection of public assets, and protection of the quality of life that the FY07 budget affords, as well as provides slight increase in key service areas to keep pace with the demands of population growth or new technology. I also present in this section an ***FY08 Level Services Budget for Town Operating Departments***, even though the Finance Committee did not request such a budget scenario, as it's important to understand that any budget funding below this amount constitutes a reduction in services.

Below is a summary of the significant highlights of the ***Level Services*** budget, both compared to FY07 and as they relate to the challenges facing the Town, followed by an identification of what is added to get to the ***Recommended Budget***. For further information, a great deal of detail, both narrative and numerical, is found in each of the departmental budget pages which follow.

1. **Cost of Living Adjustment:**
  - a. **A COLA of 3.0% has been made for Town employees not covered by a contract or collective bargaining agreements.** Wage adjustments for these employees are not arrived at by collective bargaining but are determined at the discretion of the Town Manager. This 3.0% is a minimal wage adjustment that when added to the FY07 adjustment averages to 2.25% over the two year period.
  - b. **No wage adjustment is shown for any of the Town's collective bargaining groups, as all contracts are currently in negotiation.** Some funds for settlement of contracts for these employees are requested in the salary contingency line item; if the final negotiated increases exceed these amounts after Town Meeting adjourns, then a special town meeting will need to be held to appropriate those funds.
2. **Critical Level Service Staffing**
  - a. A part-time position (30 hours per week) has been created to be shared between the Board of Health and the Conservation Commission offices. Both these offices have NO OTHER professional staff besides the department manager. This creates a level of workload demand on these two professionals that has become nearly impossible to carry, leaves the Town open to a crisis situation if either of these professionals was suddenly unable to do their jobs, and sustains a risk for the Town that priority work will not get performed by an important deadline. This added position is designed to be an entry level analyst. The Town will most likely have to pay for added training and credentialing for this person so that they can assume some of the permit related work of this office.
  - b. A part-time position (30 hours per week) has been restored to be shared between the Personnel/Assistant Town Manager's Office and the Finance Director/Treasurer-Collector's Office. Both these offices have NO OTHER professional staff besides the department manager. This creates a level of workload demand on these two professionals that has become nearly impossible to carry, leaves the Town open to a crisis situation if either of these professionals was suddenly unable to do their jobs, and sustains a risk for the Town that priority work will not get performed by an important deadline. This added position is designed to be an entry level analyst with education and/or training in management and personnel.
3. **DPW vehicle replacement, repair and maintenance remains a problem.** The Town continues to rely on lease purchases for replacing DPW fleet vehicles, and faces a backlog of needs even with such leasing. The Town has not been able to outright purchase vehicles for several years now. We need to be able to move away from this pattern and start allocating a recurring sum of money for vehicle replacement as an operating cost of this department.

Related to the aging DPW fleet is the cost of repairs and maintenance, and the amount budgeted for FY07 has already been depleted before the year is half over. This amount has been increased by \$47,550 in the *Level Service Budget*, and an extra \$25,000 has been added in the *Recommended Budget*.

4. **Utilities Changes.** The Town was protected from FY07 utility shock due to the long term contracts we had locked in several years ago but those have lapsed now. The Town's contract for electricity expired midway through FY07, and now we are paying nearly double the rate as we have enjoyed for the past several years. We have budgeted over \$106,140 more for utilities costs for FY08.
5. **Gasoline Costs.** Additionally, gasoline costs have increased. In the past all gasoline costs were covered out of the DPW budget. Beginning in FY07 I moved to the Police and Fire Departments the costs of gasoline for their vehicles. This has helped them monitor how their department staff uses this commodity. DPW covers the gasoline used by all other town vehicles, including many not used by that department. We have budgeted an additional \$45,569 for gasoline costs over the FY07 appropriation.
6. **Increase in Contracted Services.** The Town relies on many contracted services to fulfill our mission. The cost of these contracts continues to rise. We can't do without these services. They range from the maintenance costs of our financial software, audit services, nursing services, mosquito control, maintenance of public safety communications equipment, etc. All contracts for mission critical services have been funded at the level called for in the contract.
7. **The Reserve Fund budget is the same as FY07.** My ability as Town Manager to move modest amounts of funds within functions has meant that there has been a reduced need to ask for transfers from the Reserve Fund compared to years ago. Nevertheless, the \$145,000 requested is as low as this fund safely can go without potentially jeopardizing critical Town operations. Please see the detailed explanation in this budget narrative.

There are nine items that I have presented in the *Recommended Budget* but not in the *Level Services Budget*.

1. Restoring the Goodnow Library to a budget level that allows for additional weekend/evening hours of operation, adds hours to adjust for the increased demand on staff from the high utilization of the Library, and strengthens the collections of the Library. Together, funding these requests would cost about \$88,760 over the Level Services budget.
2. Creating a GIS Administrator position in the Information Systems Department. The Town has been working on developing a GIS implementation program for several years, and has reached the stage where a dedicated staff person and specialized equipment, software and data are needed to move forward. The estimated salary cost is approximately \$57,000. The equipment and software request is contained in the Capital Budget.
3. Creating a new staff firefighter position in the Fire Department. This position would take over much of the inspectional work from the Chief and the Assistant Chief. It is hoped this position would enable the Department to be able to reduce overtime costs by assigning this person to line vacancies during the day. The net cost of this proposal is approximately \$15,000 in the Fire Department budget, plus the cost of benefits.
4. Adding \$25,000 to the Vehicle Maintenance line beyond what is calculated by the DPW Director to be Level Services. The DPW's Director's request is a bare minimum to keep the fleet of Town vehicles repaired and running and providing the appropriate amount of preventative maintenance, tire replacements, etc.
5. Changing the funding for the Park & Recreation Department's Program Coordinator, adding 15 more hours to the amount this position is funded through the levy. The cost of this enhancement is just under \$20,000. This change is recommended because this position is responsible for more activities than just those funded by user fees.
6. Adding \$5,500 to the Technology Budget so that maintenance contracts on the Town's mission critical switches, routers and firewall can be purchased. The contracts cover support, upgrades and replacements within 24 hours, so the Town can reduce downtime. These contracts will protect equipment valued at \$39,000.

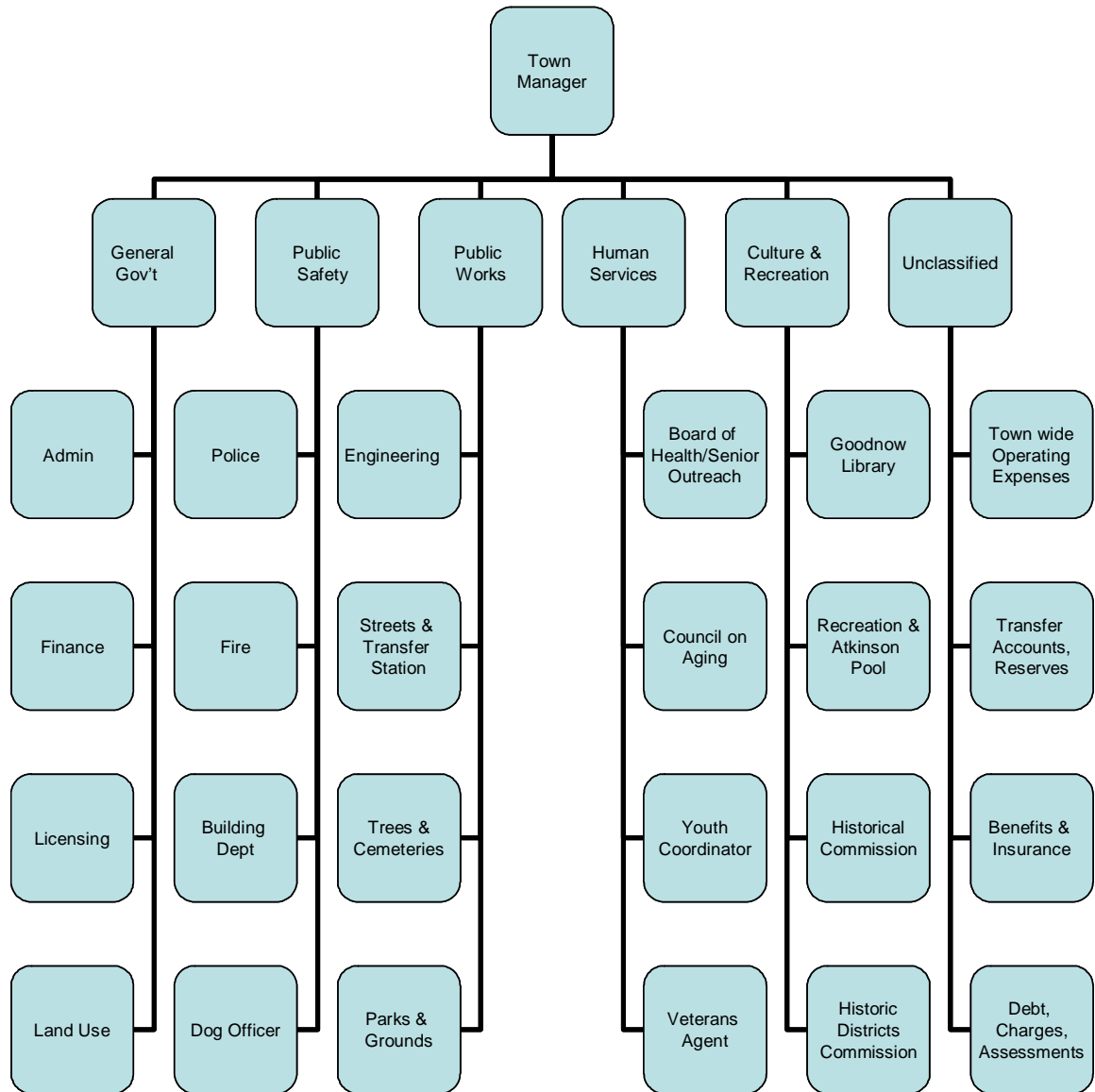
7. Adding five hours to the Council on Aging Van Driver position. The COA van provides a transportation resource for both seniors and those with disabilities younger than 60. The cost of this addition is \$3,620.
8. Adding \$10,000 to the Trees & Cemeteries division for planting of shade trees. This request was made at the request of the Historic Districts Commission, the Historical Commission, the Permanent Landscape Committee, and the Design Review Committee. They have noted that the Town has had to take down shade trees due to public safety concerns, but it would be good if the Town could plant new trees to replace those removed. These funds are recommended to begin accomplishing that goal.
9. Adding \$18,570 to supplement the current contract for periodic landscaping maintenance so that certain Town buildings – the Goodnow Library, Fire Station, Police Station, Town Hall, etc. would get twice a year intensive cleaning and trimming. Similar attention already given to the school grounds has hugely improved their appearance. This line item increase would allow the same level of attention to the Town buildings.

## Summary

### FY08 Town Manager's Recommended Budget Request for Town Operating Departments

	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
General Government	2,091,735	2,219,104	2,281,312	2,152,403	2,281,312
Public Safety	6,091,379	6,265,857	6,294,007	6,206,229	6,286,907
Public Works	3,068,845	3,343,523	3,391,953	3,283,009	3,391,953
Human Services	558,369	592,893	596,513	575,240	596,513
Culture & Recreation	1,027,672	1,058,648	1,214,107	1,058,647	1,167,322
Unclassified/Transfers	421,819	452,274	452,274	451,274	452,274
<b>Total Town Mgr Services</b>	<b>13,259,819</b>	<b>13,932,298</b>	<b>14,230,165</b>	<b>13,726,802</b>	<b>14,176,280</b>
Increase over FY07		5.07%	7.32%	3.52%	6.91%

# Budget Accounts under the Direction of the Town Manager





# GENERAL GOVERNMENT SERVICES



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>GENERAL GOVERNMENT</b>						
Selectmen/Town Manager	288,187	273,547	293,257	293,257	289,257	293,257
ATM/Personnel	123,136	122,422	151,366	151,366	133,913	151,366
Law	155,694	162,586	164,959	164,959	164,959	164,959
Finance Committee	1,835	1,959	2,007	2,007	2,007	2,007
Accounting	276,538	271,656	261,900	261,900	261,400	261,900
Assessors	244,593	251,813	258,615	258,615	258,615	258,615
Treasurer/Collector	222,798	248,436	278,950	278,950	261,797	278,950
Information Systems	277,386	296,275	304,703	366,911	304,703	366,911
Document Preservation	1,000	1,500	1,750	1,750	1,600	1,750
Town Mgr Clerk & Registrars	210,526	223,180	223,690	223,690	223,690	223,690
Conservation	78,514	80,148	98,221	98,220	81,068	98,220
Planning Board	105,329	132,021	146,762	146,762	142,470	146,762
Board of Appeals	25,690	26,192	32,922	32,922	26,922	32,922
<b>Total General Government</b>	<b>2,011,226</b>	<b>2,091,735</b>	<b>2,219,104</b>	<b>2,281,312</b>	<b>2,152,403</b>	<b>2,281,312</b>

## **GENERAL GOVERNMENT: Selectmen/Town Manager**

### **MISSION OF THE OFFICE**

The Board of Selectmen and Town Manager provide executive leadership for the Town of Sudbury. Together, we pursue collaborative process and ethical and professional procedures to insure that Town resources are directed to providing the best services possible to protect public safety, public assets and a special quality of life in Sudbury. This office supports the Board and the Town Manager as they work toward this mission.

### **DESCRIPTION OF SERVICES**

The Board of Selectmen is the executive branch of the Town government. The Board consists of three members, each elected for a three-year term. They serve without compensation. The Selectmen act as the primary policy-making body for the Town. They provide oversight for matters in litigation, act as the licensing authority for a wide variety of licenses, conduct site plan reviews, and enact rules and regulations for such matters as traffic control, and serve, along with the Town Treasurer, as Trustees of Town Trusts. The Town Manager is appointed by the Board of Selectmen, and is responsible for the management of all Town departments. The Town Manager is the appointing and contracting authority for all departments except the schools and the health department, and is responsible for overseeing all budgetary, financial and personnel administration activities of the Town. This includes preparing the annual budget, appointing all new staff and setting compensation, formulating and implementing personnel policies, and negotiating all contracts with the Town's union employees. Administrative staff in the office serves as liaison between the public and the Board, handles all telephone calls, visitors and correspondence directed to the office, and maintain all records of Board of Selectmen's meetings. The office staff prepare the warrants for all annual and special town meetings, election notices for all elections, and coordinates the Town's annual report. They maintain records of all committee and board appointments and resignations. They maintain the Selectmen's section of the Town's web site.

### **STAFFING**

Staff in the Selectmen/Town Manager's office includes the Town Manager, the Administrative Assistant to the Board, an office supervisor, a part-time recording secretary and hours for part-time assistance as needed at peak work times. Additionally, some clerical hours are provided by seniors working on the Tax Work-Off program, in exchange for a reduction in their property tax bill.

### **FY08/07 GOALS AND INITIATIVES**

- Complete the Town's preparations for emergencies, including pandemic planning, continuity of operations and disaster recovery
- Develop a detailed 5 year Capital Plan with financing options
- Bring the Police Station article to Town Meeting
- Update Cemetery rules and regulations
- Begin the work of the Housing Trust
- Begin the work of a Traffic Safety Coordinating Committee
- Begin the work of a new Solid Waste Options Committee
- Resolve the legal efforts to end the pollution of the Hop Brook pond system
- Examine ways to continue the No Place for Hate concept
- Develop a long-range plan to provide for "catch-up" funding for DPW heavy equipment

### **FY07/06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Held the 7<sup>th</sup> Annual Financial Summit
- Updated the long range financial forecast and outlook for the Town

- Adopted Budget and Financial Management Policies for the Town
- Created a committee to plan for restoring and improving the Town Centre. The committee developed and issued an RFP for engineering services to assist with process
- Created a new Ponds and Waterways Committee
- Continue legal efforts to end the pollution of the Hop Brook ponds
- Developed an overall Energy Management Program for the Town
- Developed the C.A.R.E Program – Cost Avoidance and Revenue Enhancement Efforts by Town staff (See Appendix 5 of this budget document for a copy of the program)
- Developed improved communication efforts including a new email newsletter from the Town Manager, and enhanced use of the local access cable channel and the Town's web site.
- Obtained commitment from Emerson Hospital to continue to provide Advanced Life Support services in Sudbury

## **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget is the same as the Level Services Budget. Thus, this budget maintains the same personnel and covers the same basic expenses of running the office. This budget contains sufficient funds for a 3.0% cost of living adjustment for the employees of this office. Additionally this budget includes funds for the membership costs for the Town to move from the Metro West Growth Management Committee sub-regional group to the MAGIC sub-regional planning group and funding for participation in several regional groups such as SUASCO for compliance with storm water management requirements and MAGIC for an all hazards identification and mitigation project. Additionally, the part-time economic development specialist position, which was originally cut in FY04, is still not restored under this budget.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>SELECTMEN/TOWN MANAGER</b>						
Town Manager	129,197	133,092	140,997	140,997	140,997	140,997
Administration	54,866	50,838	55,780	55,780	55,780	55,780
Overtime	1,660	2,000	2,000	2,000	2,000	2,000
Clerical	61,202	45,517	48,431	48,431	48,431	48,431
Executive Incentive Program	9,250	11,250	13,000	13,000	12,500	13,000
Non-accountable Travel	-	3,825	4,500	4,500	4,500	4,500
Sick Leave Buy Back	1,262	-	-	-	-	-
<b>Sub Total: Personal Services</b>	<b>257,437</b>	<b>246,522</b>	<b>264,707</b>	<b>264,707</b>	<b>264,207</b>	<b>264,707</b>
General Expense	16,500	16,500	17,500	17,500	16,500	17,500
Maintenance	-	750	750	750	750	750
Travel	4,000	275	300	300	300	300
Out of State Travel	4,500	4,500	5,000	5,000	4,500	5,000
Contracted Services	5,000	5,000	5,000	5,000	3,000	5,000
Equipment	750	-	-	-	-	-
<b>Sub Total: Expenses</b>	<b>30,750</b>	<b>27,025</b>	<b>28,550</b>	<b>28,550</b>	<b>25,050</b>	<b>28,550</b>
<b>Total: Selectmen</b>	<b>288,187</b>	<b>273,547</b>	<b>293,257</b>	<b>293,257</b>	<b>289,257</b>	<b>293,257</b>

## **GENERAL GOVERNMENT: Assistant Town Manager/Personnel Director**

### **MISSION OF THE OFFICE**

To support the Town Manager in the most effective administration of Town government by employing personnel practices and policies which promote and sustain a high performance Town organization through hiring, developing and retaining high caliber employees.

### **DESCRIPTION OF SERVICES**

The Assistant Town Manager/Personnel Director is responsible for personnel, risk and benefit management for over 700 employees and 200 retirees of the Town and the Sudbury Public Schools. Specific responsibilities include:

- Compliance with Labor Laws & Regulations
- Personnel Policies and Procedures
- Classification and Compensation Plans
- Personnel Records and Data
- Employee Insurance Benefits
- Workers' Compensation Administration
- Property and Liability Insurance Administration
- Collective Bargaining
- Recruitment and Hiring
- Training
- Performance Evaluation Programs
- Supervisor Support
- Employee Relations and Communications
- Employee Recognition

### **STAFFING**

Staffing consists of the Assistant Town Manager and a part-time Personnel Assistant/Benefits Coordinator. In addition, a small amount is allocated for limited hours of clerical assistance as needed.

### **FY08 GOALS AND INITIATIVES**

- Finalize the update and revisions to the employee personnel handbook
- Compile an administrative policy handbook containing and updating all the administrative (i.e. non personnel) policies of the Town.
- Insure that the Town is in compliance with GASB reporting requirements on the financial liability created by the Other Post Employment Benefits (OPEB) rule
- Conduct analysis of the Town's alternatives for containing escalating costs of health insurance
- Work with health insurance carriers to insure continued compliance with Medicare D
- Reduce time and improve process for hiring of town employees
- Work with Finance Department to successfully implement the new job pay MUNIS module
- Assume senior level leadership and oversight responsibilities for all departments in the Cultural and Recreational functional areas.

- Develop plans to increase training and professional development opportunities for Town staff to meet both certification requirements and best practices knowledge of staff.
- Participate as part of the Town Manager's Senior Management Team in regular discussions on issues involving multi-departmental collaboration and/or strategic planning.

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Produce for the Town Manager's approval a new personnel handbook
- Review and update Town procedures and options for employees facing long-term illnesses.
- Working with the Police Chief and other town officials, develop a response plan for any hate incidents that may occur in Sudbury
- Develop and oversee a process for recruitment and selection of a new Town Clerk, Town Accountant, Assistant Building Inspector and Office Supervisors for the Town Manager/Board of Selectmen's Office and the Fire Department.
- Complete a classification and compensation study for nonunion positions of employment.
- Oversaw the recruitment, assessment, and selection of a new Assistant Fire Chief, a new Assistant Library Director, office staff within several departmental offices, and a new Teen Center Director.
- Working with the police and fire chiefs, recruited several new police officers and firefighters through entry level examinations or interdepartmental transfers to fill vacancies caused by retirements and transfers. Also recruited new dispatchers in both departments.
- Continued the recently reestablished employee safety committee and worked with the Town's property and liability and worker's compensation insurance carrier to secure the most cost-effective and comprehensive coverage available.
- Updated the Town's health insurance policies and worked with our health care consultant and with representatives of our health insurance carriers to comply with new federal and state mandates.
- Continue with the supervisory training program and expand training opportunities to other Town employee groups, particularly school personnel.
- Arranged for employee wellness initiatives and promoted increased employee awareness of the Town's Employee Assistance Program.
- Continued to work with human resources consultants, professional organizations and colleagues in other municipalities to obtain comparable salary and benefit data and stay current with legal developments relating to personnel and employment law.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Personnel Action Forms Processed</b>	<b>480</b>	<b>304</b>
<b>Employment Applications received</b>	<b>212</b>	<b>227</b>
<b>Positions Filled</b>	<b>37</b>	<b>43</b>
<b>Average applications per vacancy</b>	<b>15</b>	<b>14</b>
<b>Number of employees covered by Town Health Insurance</b>	<b>463</b>	<b>484</b>
<b>Number of retirees covered by Town Health Insurance</b>	<b>230</b>	<b>248</b>

## **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Level Services Budget and Recommended Budget are the same; both include funds for restoration of a part-time shared budget/personnel analyst position to assist the Assistant Town Manager/Personnel Director with all the personnel and benefits management responsibilities he is charged with. This is not a new initiative, because up to FY04, the Town had a part-time personnel position which was eliminated due to budget cuts, and this position has never been restored. This budget restores that position, and changes the nature of the job so that it assists both the Assistant Town Manager/ Personnel Director AND the Finance Director/Treasurer-Collector. Each high level manager would receive about 15 hours per week assistance with analytical tasks. Currently, each of these two managers spend far too much of their time on tasks that could be handled by someone at a lower grade, and higher level tasks get postponed or finished by deadlines but in a hurried manner.

Funds to maintain the same personnel and cover basic, unavoidable expenses of the office are included. The amount requested for office expenses is the same as for FY07. Funds for contractual services are used to hire specialized consultants for assistance with various personnel matters that come up during the year, and for the cost of recruiting and advertising when hiring employees. Funds for professional development are used for this office and for other department heads, supervisors and employees for relevant seminars, workshops and courses.

This budget maintains the austere level for recruiting and training and professional development that has been carried for the last three years. The minimal funding for professional development seriously undermines our commitment to training our supervisory staff and our employees, and the Selectmen's guiding value of protecting and enhancing the professionalism of the town's staff cannot be fully achieved.

NOTE: Although this department does not specifically generate revenue, one of its important responsibilities is to closely monitor all employee benefit and insurance programs to insure that costs and expenditures under these programs are accurate and controlled. Working closely with insurance providers, in excess of \$100,000 has been realized through recoveries and savings.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ASSISTANT TOWN MGR/PERSONNEL</b>						
Assistant Town Manager	81,170	82,388	92,702	92,702	92,702	92,702
Benefits Coordinator	-	31,684	28,778	28,778	28,778	28,778
Budget/Personnel Analyst			17,153	17,153		17,153
Clerical	31,216		4,083	4,083	4,083	4,083
<b>Sub Total: Personal Services</b>	<b>112,386</b>	<b>114,072</b>	<b>142,716</b>	<b>142,716</b>	<b>125,563</b>	<b>142,716</b>
General Expense	2,000	2,000	2,250	2,250	2,000	2,250
Travel	400	400	400	400	400	400
Contracted Services	7,400	4,000	4,000	4,000	4,000	4,000
Employee Profess. Develop.	950	1,950	2,000	2,000	1,950	2,000
<b>Sub Total: Expenses</b>	<b>10,750</b>	<b>8,350</b>	<b>8,650</b>	<b>8,650</b>	<b>8,350</b>	<b>8,650</b>
<b>Total: ATM/Personnel</b>	<b>123,136</b>	<b>122,422</b>	<b>151,366</b>	<b>151,366</b>	<b>133,913</b>	<b>151,366</b>



**MISSION OF THE OFFICE**

To support the Board of Selectmen, the Town Manager and the Town's departments and committees by providing legal advice and activities which sustain a Town organization that always acts ethically and professionally and avoids unnecessary and costly consequences.

**DESCRIPTION OF SERVICES**

The Town Counsel's office performs an intermediary function by providing legal opinions upon request from Town Departments. These requests involve issues such as conflicts of interest, interpretation and understanding of various rules, regulations, procedures, and state law and statutes in connection with town programs and projects. The Town Counsel's office also provides legal review and drafting services for town acts, articles and bylaws, contracts and lease agreements, as well as the preparation of documents and filing, and representing the Town in all court actions.

**STAFFING**

Personnel under this budget include a part-time Town Counsel, who is a contracted employee to the Town, a part-time legal assistant and one part-time clerk, who are employees of the town, and "job-share" this position, neither requiring benefits. The Town Counsel is appointed by the Board of Selectmen, but supervised by the Town Manager. Other office staff is appointed by the Town Manager.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

It is difficult to anticipate litigation matters. The anticipated costs of hourly legal representation above and beyond the Town Counsel's retainer will probably be greater than this budget allows for. Litigation to defend the decisions of the various boards can be expensive and difficult to predict. And we anticipate that the Selectmen's intention to continue to protect the best interests of Sudbury in the matter of the Marlboro Easterly Wastewater Treatment Plan permitting will continue into FY08. The Board of Selectmen will seek a reserve fund transfer to supplement this budget if any of potentially costly legal matters cannot be resolved within the budget. Additionally collective bargaining is a time consuming process that involves detailed knowledge of labor law at both the federal and state level, and specialized counsel is invaluable for these efforts.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>LAW</b>						
Town Counsel	39,423	40,014	41,214	41,214	41,214	41,214
Clerical	35,728	36,264	37,352	37,352	37,352	37,352
<b>Sub Total: Personal Services</b>	<b>75,151</b>	<b>76,278</b>	<b>78,566</b>	<b>78,566</b>	<b>78,566</b>	<b>78,566</b>
General Expense	5,700	5,890	5,975	5,975	5,975	5,975
Legal Expense	74,843	80,418	80,418	80,418	80,418	80,418
<b>Sub Total: Expenses</b>	<b>80,543</b>	<b>86,308</b>	<b>86,393</b>	<b>86,393</b>	<b>86,393</b>	<b>86,393</b>
<b>Total: Law</b>	<b>155,694</b>	<b>162,586</b>	<b>164,959</b>	<b>164,959</b>	<b>164,959</b>	<b>164,959</b>

**GENERAL GOVERNMENT: Finance Department - Finance Committee**

**MISSION OF THE COMMITTEE**

The Mission of the Finance Committee is to advise Town Meeting on all budgetary and financial matters that come before Town Meeting, and to consider requests from the Town Manager for allocations from the Reserve Fund.

**DESCRIPTION OF SERVICES**

The Finance Committee is comprised of nine members appointed by the Town Moderator. Approximately nine months before the April Annual Town Meeting, the FinCom issues guidelines for development of the operating budget requests from the various cost centers, based upon revenue expectations and information needs of the FinCom. During the year, members of the FinCom serve as liaisons to the cost centers and attend monthly planning meetings with them. During January and early February of each year, the FinCom conducts detailed budget hearings, leading to a recommended budget that is balanced within the limits of Proposition 2 ½. The Finance Committee may also recommend a budget that exceeds these limits, requiring a Proposition 2 ½ override question be placed on a ballot at the annual or a special election if approved by the Board of Selectmen and Town Meeting

The Reserve Fund is considered part of the budget that is allocated to the Town Operating Departments and provides the Town with the flexibility to address unexpected or emergency costs that arise during the fiscal year.

**STAFFING**

The only staff for this committee is a part-time recording secretary.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>FINANCE COMMITTEE</b>						
Clerical	1,585	1,609	1,657	1,657	1,657	1,657
<b>Sub Total: Personal Services</b>	<b>1,585</b>	<b>1,609</b>	<b>1,657</b>	<b>1,657</b>	<b>1,657</b>	<b>1,657</b>
General Expense	250	350	350	350	350	350
<b>Sub Total: Expenses</b>	<b>250</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>350</b>	<b>350</b>
<b>Total: Finance Committee</b>	<b>1,835</b>	<b>1,959</b>	<b>2,007</b>	<b>2,007</b>	<b>2,007</b>	<b>2,007</b>

**MISSION OF THE OFFICE**

The Mission of the Town Accountant's Office is to protect the Town's financial interests and ensure that Town resources are expended and received according to local bylaws, General Laws of the Commonwealth and sound accounting practices. Charged with maintaining and examining all financial records, the Accounting Office provides Town officials and the public accurate information to facilitate the effective management of the Town.

**DESCRIPTION OF SERVICES**

The Town Accountant's Office maintains all the financial records for the Town. Payroll for all town and school employees and accounts payable for all departments are processed through this office. In processing these transactions, the Town Accountant by statute, examines and approves all financial transactions verifying compliance with local and state law, establishes procedures and implements sound business practices and maintains a general ledger. The office monitors all budgets and provides a monthly budget statement to all departments and boards. It also is responsible for maintenance of the financial software used by the Town, and the filing of all reports to the Department of Revenue and various governmental agencies.

**STAFFING**

The Accounting division of the Finance Department consists of the Town Accountant, the Assistant Town Accountant and two clerical positions.

**FY08 GOALS AND INITIATIVES**

- Address all outstanding issues from Annual Audit for period ending June 30, 2007 and finalize the requirements of GASB 34 by bringing Infrastructure on to the Financial Statements
- Oversee more use of current MUNIS accounts payable functionality, including decentralizing entry of vendor bills by selected departments
- Oversee more use of current MUNIS general billing functionality by tracking miscellaneous billing such as "paid detail" and COBRA collections
- Oversee training and use of MUNIS payroll module for tracking compensated leave
- Prepare for the implementation of GASB 45 by recognizing post-employment benefits

**FY07 MAJOR INITIATIVES**

- Implement the new MUNIS payroll/personnel module, an approved capital project of the 2006 Town Meeting
- Work with the Treasurer/Collector office on implementation of the new MUNIS tax billing and collection software, an approved capital project of the 2006 Town Meeting

**FY06 MAJOR ACCOMPLISHMENTS**

- Completed change of access to Treasurer's vault room and related office renovations

- Increased the use of the current MUNIS Budget module functionality by working with the Town Manager to use module during budget preparation
- When the Town Accountant was also the Finance Director, accomplished the following:
  - o Streamlined forms used for information gathering from departments in preparation of FY07 budget
  - o Prepared report and analysis for FY06 Financial Summit, including updating Financial Trend Monitoring Report of Town's Financial Condition
  - o Provided staff support to the Finance Committee and Town Manager for preparation of the FY07 budget
  - o Provided staff support to the Capital Improvement Planning Committee for preparation of the FY07 capital budget

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>	<b>% Change</b>
<b>Invoices Paid</b>	<b>15,430</b>	<b>16,023</b>	<b>3.7%</b>
<b>Payroll Checks Processed</b>	<b>17,525</b>	<b>18,237</b>	<b>3.9%</b>
<b>W-2's Processed</b>	<b>1,009</b>	<b>1,023</b>	<b>1.4%</b>
<b>Total General Fund Dollars Expended</b>	<b>\$62,840,260</b>	<b>\$68,606,163</b>	<b>8.4%</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

The Town Accountant is no longer the Finance Director. With the retirement of the prior Town Accountant, it is now the Treasurer-Collector who is doing double duty as the Finance Director. The Level Services Budget for FY08 takes into consideration the cost of the contract for audit services has increased by \$7,000 and computer support has increased by \$4,000.

This is a critical budget. The financial recordkeeping and payroll responsibilities of this office, with all the state and federal mandates that must be complied with, mean that increasing costs in this budget must be funded, and offsetting cuts identified elsewhere. The Town Manager's Recommended Budget is as lean as can safely be crafted without the risk of unacceptable costly errors and penalties. And it should be noted this office provides required services to both the Sudbury Public Schools as well as the Town departments. Actually, in terms of percentage of payroll processed, vouchers processed, tax filings, retirement board contributions, voluntary deductions remitted to various vendors, etc. the larger percentage of activities of this office is attributable to meeting the financial needs of the Sudbury Public Schools and their employees.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ACCOUNTING</b>						
Town Accountant	82,426	73,215	62,089	62,089	62,089	62,089
Asst to FD Stipend	2,500	327	-	-	-	-
Clerical	123,785	128,424	119,038	119,038	119,038	119,038
Sick Leave Buy Back	3,096	3,218	1,511	1,511	1,511	1,511
Overtime	1,061	1,077	2,060	2,060	2,060	2,060
<b>Sub Total: Personal Services</b>	<b>212,868</b>	<b>206,261</b>	<b>184,698</b>	<b>184,698</b>	<b>184,698</b>	<b>184,698</b>
General Expense	7,900	7,900	7,900	7,900	7,500	7,900
Computer	21,000	21,000	25,202	25,202	25,202	25,202
Maintenance	2,020	2,020	2,400	2,400	2,400	2,400
Travel	1,250	1,475	1,700	1,700	1,600	1,700
Contracted Services	31,500	33,000	40,000	40,000	40,000	40,000
<b>Sub Total: Expenses</b>	<b>63,670</b>	<b>65,395</b>	<b>77,202</b>	<b>77,202</b>	<b>76,702</b>	<b>77,202</b>
<b>Total: Accounting</b>	<b>276,538</b>	<b>271,656</b>	<b>261,900</b>	<b>261,900</b>	<b>261,400</b>	<b>261,900</b>

### **MISSION OF THE OFFICE**

To ensure an equitable share of the tax burden to all taxable real and personal property entities, by regular review and analysis.

### **DESCRIPTION OF SERVICES**

The Assessors Office is responsible for assessing property taxes, the major revenue source for the town. To accomplish this all real and personal property is valued as of January 1st of each year. The valuations are used to fairly allocate the taxes necessary to fund the Town's annual budget. We calculate the annual new growth increase in the levy limit. New growth is an additional amount based on the assessed value of new construction and other growth in the tax base not related to any revaluation program. The Assessors' set the annual tax levy and rate(s) for the year. We prepare the annual tax roll, and commit the list to the Tax Collector with a warrant to collect the taxes. We administer the tax exemption/deferral program and act on abatement and exemption applications, including the Community Preservation Surcharge exemptions. A reserve fund is allocated annually (Overlay Account) to fund anticipated property tax abatements and exemptions. We are responsible for assessing and administer excise taxes. In keeping with the "Financial Team Approach" of service, to share information and resources the Assessing Department provides data reports to numerous Town Departments.

### **STAFFING**

The personnel in this office include the Director of Assessing, an Assistant Assessor, one full-time clerical position and one full time and one part-time data collectors. All staff in this office is appointed by the Town Manager.

### **FY08 GOALS AND INITIATIVES**

- Analysis and if warranted, revaluation of all residential, commercial, industrial properties, vacant and improved, special use, i.e. Chapter discounts, Personal Property and Mixed Use.
- Commence new 10 year re-inspection program.
- Maintain personal exemption programs;
- Inspect and value Chapter 203 accounts.
- Inspection and valuation of major new condominium complexes (over 100).

### **FY 07 MAJOR INITIATIVES AND FY06 ACCOMPLISHMENTS**

- Complete full revaluation of all residential, commercial, industrial properties, vacant and improved, special use, i.e. Chapter discounts, Personal Property and Mixed Use.
- Finalize the 10 year re-inspection program.
- Implement and maintain personal exemption programs;
- Produced local cable TV program explaining exemption programs,
- Inspect and value Chapter 203 accounts.
- Redefine parcel-id's for engineering and GIS

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY05	FY06	% Change
Real & Personal Property values maintained	6,721	6,840	1.8%
Property re-inspections completed	553	619	11.9%
Permits, valued, measured and listed	355	565	59.2%
Excise committed and maintained	17,722	17,911	1.1%
All Exemptions/Deferrals Processed	535	561	4.8%
Revaluation Performed	Full	Full	

## BUDGET ISSUES

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

This budget must be retained as any reductions could have a significant impact on the ability of the Town to issue timely and correct tax bills. And it is critical for all cost centers that the Town issue all tax bills on time, so that the Town's cash flow is not jeopardized at any time. The State requires assessing offices to periodically inspect all real properties over a ten year period. The inspections are conducted on a cyclical basis, and are ongoing. Furthermore, the Assessors are mandated to review and update values annually. Associated costs include the production of a myriad of analytical reports, discovery of all business personal property accounts, field review of all properties, inspection of sold properties, production of 6,800+ new property cards, and all other related requirements.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ASSESSORS</b>						
Assessor	70,838	72,427	72,777	72,777	72,777	72,777
Clerical	139,392	144,506	150,924	150,924	150,924	150,924
Stipend	-	1,000	1,000	1,000	1,000	1,000
Sick Buy Back	1,113	1,130	1,164	1,164	1,164	1,164
<b>Sub Total: Personal Services</b>	<b>211,343</b>	<b>219,063</b>	<b>225,865</b>	<b>225,865</b>	<b>225,865</b>	<b>225,865</b>
General Expense	11,750	11,750	11,750	11,750	11,750	11,750
Tuition	1,500	1,000	1,000	1,000	1,000	1,000
Contracted Services	20,000	20,000	20,000	20,000	20,000	20,000
<b>Sub Total: Expenses</b>	<b>33,250</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>	<b>32,750</b>
<b>Total: Assessor</b>	<b>244,593</b>	<b>251,813</b>	<b>258,615</b>	<b>258,615</b>	<b>258,615</b>	<b>258,615</b>



**MISSION OF THE OFFICE**

To provide collection, deposit, investment and financial reporting for all funds due to the Town in an efficient and effective manner. To provide all financial custodial services for the Town in compliance with all State and local regulations; in a manner that best meets the needs of the individual taxpayer and the community, as a whole.

**DESCRIPTION OF SERVICES**

The Treasurer/Collector office issues over 35,000 bills each fiscal year, including real estate and personal property taxes (quarterly), and motor vehicle excise tax (annually). The office pursues timely collection of all bills and maintains a collection rate of nearly 99% of all property tax bills. The Treasurer/Collector establishes and maintains Tax Title accounts on all significantly delinquent real estate tax accounts. In the area of Treasury management, the Treasurer's office is responsible for the receipt, investment and disbursement of all town funds. Staff manages all town bank accounts, conducts both short term and long term borrowing for the Town and invests all available funds to produce investment income. The Treasurer is a Trustee of Town Trusts, and invests and reports on all Trust Fund Activities. The Investment Advisory Committee assists in recommending investment priorities for the Trust funds.

The Treasurer-Collector also serves as the Town's Finance Director/Budget Director. As such, she prepares the Town's annual operating budget and the financial section of the Annual Warrant, the Town's Annual Capital Budget and Five Year Capital Improvement Plan, and conducts all analysis and documentation for the Town's Annual Financial Summit. She receives no assigned staff assistance with all these additional responsibilities.

**STAFFING**

For FY08, the department includes the Treasurer/Collector, the Assistant Treasurer/Collector, 2 full-time clerks and a ½ time clerical position. Additionally, some clerical hours are provided by a senior who is earning a reduction in her property tax bills through the Town's Tax Work-Off Program. The Treasurer/Collector serves as the Town's Finance Director.

**FY08 GOALS AND INITIATIVES**

- Complete all tax bill cycles within new software system.
- Obtain new lockbox vendor; consider new online tax payment system(s), for taxpayer convenience.
- Maintain tax title receivables below \$500,000 or less than 1% of the current year's gross tax levy.
- Finish reconciling application escrow accounts; identify and release excess escrow income to general funds use.

**FY06/07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Will complete implementation of new tax software system to fully-integrated MUNIS base modules. Live date May 07.
- Completed Low-Value Land Petition for the DOR. Town stands to foreclose/claim 29 odd parcels, some of which may be sold at public auction to recoup lost tax revenues dating back as far as the mid-1970's.

- Have initiated several larger value foreclosure proceedings in Land Court. The Town anticipates collecting on all foreclosure cases by default or payment in full.
- Took necessary steps to release some tailings to general funds in October 2006 in upwards of \$40,000. Also reduced the number of recent tailings significantly through active search/reconciliation.
- Completed reconciling performance bond escrow accounts; plans to release more than \$60,000 in excess/defaulted escrow income to general funds this year.

**PERFORMANCE/WORKLOAD INDICATORS**

Generally speaking, since all taxes levied must be collected measurement goals revolve around time outstanding/cycle. Shortening the collection cycle improves the likelihood of collection, cash flow and accuracy in budgeting/forecasting.

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Average elapse time to tax title</b>	<b>3 months</b>	<b>&lt;3 months</b>
<b>Delinquent tax balance over \$10K</b>	<b>14 parcels</b>	<b>11 parcels</b>
<b>Tax titles outstanding</b>	<b>124 parcels</b>	<b>70 parcels</b>
<b>Remaining bills turned over to Deputy for collection</b>	<b>749</b>	<b>705</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None for this office

The Town Manager’s Level Services Budget and Recommended Budget are the same; both include funds for creation of a part-time shared budget/personnel analyst position to assist the Assistant Town Manager/Personnel Director with all the personnel and benefits management responsibilities he is charged with. This is not a new initiative, because up to FY04, the Town had a part-time personnel position which was eliminated due to budget cuts, and this position has never been restored. This budget restores that position, and changes the nature of the job so that it assists both the Assistant Town Manager/ Personnel Director AND the Finance Director/Treasurer-Collector. Each high level manager would receive about 15 hours per week assistance with analytical tasks. Currently, each of these two managers spend far too much of their time on tasks that could be handled by someone at a lower grade, and higher level tasks get postponed or finished by deadlines but in a hurried manner.

The Town Manager’s Recommended Budget and Level Services Budget contain funds to maintain the basic, unavoidable expenses of the office, and step increases for the staff, most of who have worked for this department for less than three years and thus are on the lower steps of their respective pay grids, and a small increase in the travel line. Both the Treasurer/Collector and Assistant Treasurer/Collector need to attend courses to obtain their certification and this account was underfunded in the FY07. The addition of \$2,500 has been made in FY08 to reflect the shift in duties of Finance Director from Accounting to the Treasurer/Collector’s office. Approximately \$5K has been cut in operating expenses in FY08 to reflect lower tax collection costs, office supplies and general equipment costs.

This office collects all payments and maintains all bank accounts. Any reductions in staff or shortcuts to procedures that insure the timeliness and safeguarding of Town funds

would only reduce the revenue available to the Town as a consequence by lessening opportunities for investment income.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TREASURER/COLLECTOR</b>						
Fin. Director/Treasurer-Collector	60,038	77,496	86,654	86,654	86,654	86,654
Clerical	118,760	121,267	129,968	129,968	129,968	129,968
Budget/Personnel Analyst			17,153	17,153	-	17,153
Stipends	-	2,173	2,500	2,500	2,500	2,500
<b>Sub Total: Personal Services</b>	<b>178,798</b>	<b>200,936</b>	<b>236,275</b>	<b>236,275</b>	<b>219,122</b>	<b>236,275</b>
General Expense	24,500	24,050	12,425	12,425	12,425	12,425
Maintenance	8,750	8,750	8,750	8,750	8,750	8,750
Travel	750	1,200	1,500	1,500	1,500	1,500
Tax Collection	10,000	10,000	20,000	20,000	20,000	20,000
Tax Title Expense	-	3,500	-	-	-	-
<b>Sub Total: Expenses</b>	<b>44,000</b>	<b>47,500</b>	<b>42,675</b>	<b>42,675</b>	<b>42,675</b>	<b>42,675</b>
<b>Total: Treasurer-Collector</b>	<b>222,798</b>	<b>248,436</b>	<b>278,950</b>	<b>278,950</b>	<b>261,797</b>	<b>278,950</b>

**MISSION OF THE OFFICE**

The mission of the Information Systems Office is to increase productivity by streamlining the flow of information through the Town's internal and external network, and providing technical support and training to all Town offices.

**DESCRIPTION OF SERVICES**

The information systems division of the Finance Department is responsible for purchasing, implementing, administering, and maintaining the Town's Microsoft 2003 Active Directory network infrastructure, which includes all network and wireless connectivity, users, servers, computers, software, backup and security. All of the Town's Telecommunications are managed by the IT Department, including: all telephone systems, email, cellular technology, fax operations, pagers and cable television. The IT Department provides computer training, software support, system maintenance and repairs. The software support includes all major data systems, linking the various data stores within the Town network. Examples of some of these applications are the tax collection, accounting, and assessing software used by the Finance Department, the Police dispatch and incident tracking system, as well as the development of Sudbury's GIS program.

The expansion and management of the Town Website is an integral component of the IT Department. The dissemination and posting of information is essential in providing current news, documents and other matters of public interest, in a timely convenient fashion, thus lessening the need to contact departments directly. The department is also responsible for the management of the Town's electronic documents, providing the capability to archive documents securely while offering efficient access when needed. The IT Department added VPN's (virtual private networks) which provide staff and software vendor's access to the Town's network from offsite locations, expanding the work environment outside the confines of the office.

**STAFFING**

Staff in the Information Systems Office includes the Technology Director and a Technology Assistant, with some summer help and a consultant to work on the Town's website.

**FY08 GOALS AND INITIATIVES**

- Distribute new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Upgrade computer software on all computers to latest versions available (ongoing)
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Continue to update the Town Website adding new features and capabilities (ongoing)
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Upgrade Patriot Properties Assessing Software to an SQL 2005 compatible version moving it from Server06 to new ServerSQL. All client software must be upgraded and reconfigured to connect to the new server
- Upgrade the Local Area Network (LAN) at the Fire Station by adding new Gigabit core switch. Establishing VLANs on the network which will segment network traffic thus

- improving the overall network performance. The Fiber WAN connection from the Fire to the Flynn building will also be upgrade to Gigabit speed.
- Replaced email server (Exchange) and upgraded email software to Exchange 2007 on the new server.
  - Establish telecom gateways connecting existing phone systems at the Police and the DPW buildings to our newly established VOIP network. This will allow extension dialing between DPW, Police, Fairbank and the Flynn building, thus utilizing the data network for intra-building calling and reducing the need for Centrex lines.
  - Work with the GIS Administrator / GIS Consultant to implement the FY08 initiatives in Sudbury's GIS plan.
  - Establish network connection at the Parks and Ground department using the existing Fire Alarm wire. The 10 Mb network connections would be established with a SHDSL modem at Park and Grounds and at the Town Hall.
  - Deploy and implement Secure wireless private access points for Town Staff at the Fire Station.
  - Add centralized management capabilities to our Wireless network. Segment Access Points so that secure Public and Private wireless access can coexist within the same access points.

#### **FY07 GOALS AND INITIATIVES**

- Distribute new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Upgrade computer software on all computers to latest versions available (ongoing)
- Keep troubleshooting records which will be incorporated into the Town Intranet as part of a computer help desk.
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Continue to update the Town Website adding new features and capabilities (ongoing)
- Gather information from our software vendors about adding Online Transaction capability to our website and then implement the solution.
- Gather Information about URL Filtering options, which would allow the Town to manage employee internet access. Creating reports which analyze how employees are using the Internet and identify activity that is degrading network performance. Should provide reports such as daily/weekly/monthly/yearly traffic, most blocked URLs, most active users, and individual use.
- Upgrade Filemaker Pro Server to 8.0 moving it from Server06 to the new ServerSQL. Requires that all databases be converted to the new version and the client software be upgraded to 8.0.
- Upgrade Patriot Properties Assessing Software from SQL 7.0 to SQL 2000 reconfiguring the databases and software on Server 06.. All client software must be upgraded and reconfigured to connect to Server06 running SQL 2000
- Upgrade Sudbury Historical Archives to new SQL content version and move the database from Server06 to new ServerSQL. Clients at the Goodnow Library and IT departments will need their software upgraded and reconfigured.
- Implement a VOIP (Voice-Over-Internet-Protocol) telephone system in both the Flynn and Fairbank buildings.
- Implement an archiving software system at the Police, Assessing and Town Clerk departments which scans, stores and retrieves departments paper and electronic documents from a centralize database server.
- Purchase and implement an enterprise-wide permitting software solution to be utilized by any department or committee responsible for the issuing of permits or licenses.

- Upgrade the Local Area Network (LAN) at the DPW by adding new Gigabit core switch. Establishing VLANs on the network which will segment network traffic thus improving the overall network performance. The Fiber WAN connection from the DPW to the Flynn building will also be upgrade to Gigabit speed.
- Gather information about the offsite data collection needs of each department.
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Implement public and vendor internet access in the town buildings through the cable modem located at the library
- Replace Webshield e250 gateway content filtering server with McAfee Secure Internet Gateway 3200 appliance. New equipment scans web and email traffic for Viruses and SPAM
- Replace Elron Windows NT Firewall and Cisco PIX 501 VPN/Firewall security appliance with a Cisco ASA5520 security appliance. Replicate Elron Firewall and Cisco PIX 501 configurations onto the ASA5520 device. Establish new external internet IP's for Email, Tax, VPN, DNS and Filemaker and reconfigure external Primary and Secondary DNS servers to match new IP schemes.
- Created Filemaker Database to track people who have medical conditions and/or special circumstances which require that they be called to check on their well being. The Emergency Call List database will be shared through Filemaker 8.0 Server and accessed by the Police, Fire and Senior Center. The information will be entered by Senior Center staff and the Fire and Police will use it to lookup emergency information such as relatives, friends, neighbors, Primary Doctors, Medical Conditions and Special Circumstances. Police/Fire will also be able to enter emergency incidents into the person's data file.
- Implement web component module of the Patriot Properties Assessing software.
- Build a main GIS data depository in Personal Geodatabase format for town wide data sharing (with all MassGIS layers and existing GIS layers maintained by the Engineering)
- Work with the GIS Consultant to implement the FY07 initiatives in Sudbury's GIS plan.

#### **FY05/FY06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Upgraded all Windows NT 4.0 servers to Windows 2000 / 2003 and implemented Active Directory services on the Town's data network.
- Distributed new PC's to employees who need higher performance to keep up with their productivity (ongoing)
- Created Filemaker Database to track Fire Department Residential Burning Permits. Residents have the ability to go website to register on a day they plan to burn. They can also call in to an automated line in which they can enter their permit number and register to burn. Both of these methods integrate with the permit database, sending the data to the server and updating the residential record.
- Replaced SQL Server (Server06) and upgraded our database software to SQL 2005.
- Upgraded Website database to SQL 2005 and move it from Server06 to ServerSQL.
- Upgraded computer software on all computers to latest versions available (ongoing)
- Replaced email server (Server02) and upgraded email software to Exchange 2003 on new server.
- Replaced PAMET NT Server (PAMET) with new Windows 2003 server with SQL 2000 installed. Upgraded the PAMET Police databases to SQL 2000 then transferred data to new server and reconfigured client software.
- Added RBL (Realtime Blackhole List) service to Webshield e250 to block known SPAM IP's and domains.

- Added spam and virus filtering to our internet gateway by adding a McAfee E250 Web filtering appliance and also installed McAfee Exchange Group Shield Antivirus software on our email server.
- Purchase an archiving software system at the Police, Assessing and Town Clerk departments which scans, stores and retrieves departments paper and electronic documents from a centralize database server.
- Purchase a VOIP (Voice-Over-Internet-Protocol) telephone system in both the Flynn and Fairbank buildings.
- Increase knowledge of new technologies through seminars, courses, trade journals and IT events (ongoing)
- Working with departments to make sure that data is updated on our Town Website. (ongoing)
- Developed and implemented Marriage Licensing database for the Town Clerk.
- Added redundant internet connections to the Town's Network by installing and configuring Radware LinkProof device. This device load balances our client internet connections utilizing all three available internet sources (School T1 line; Minuteman T1 Line; and Library Cable Modem). If an internet line goes down the clients are redirected to the remaining functioning internet connections thus eliminating downtime.
- Implemented wireless networking in the library for patrons who want to bring laptops into the library and utilize the library's internet connection.
- Added a new generator to the Flynn Building which will power all networking and telecommunications equipment during a power failure
- Work together with GIS Consultant to create a comprehensive 5-year GIS Implementation Plan for the town.
- Secure wireless private access points installed and implemented for Town Staff in the Flynn, Town Hall, Library, DPW and Fairbank buildings
- Continue to update the Town Website adding new features and capabilities (ongoing)

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY04	FY05	FY06
<b>Staff Computers</b>	<b>194</b>	<b>221</b>	<b>221</b>
<b>Computer User Accounts</b>	<b>199</b>	<b>219</b>	<b>229</b>
<b>Email Accounts / Email Distribution Groups</b>	<b>338 / 66</b>	<b>1018 / 119</b>	<b>1551/112</b>
<b>New Hires - Town</b>	<b>94</b>	<b>87</b>	<b>64</b>
<b>VPN Users</b>	<b>7</b>	<b>24</b>	<b>31</b>
<b>Total Website Hits Per Year</b>	<b>1,710,564</b>	<b>2,763,486</b>	<b>4,127,667</b>

## BUDGET ISSUES

New Budget Initiatives for FY08 The Town Manager's Recommended Budget has two new initiatives for FY08. First, money is allocated for the purchase of CISCO SmartNET 8x5xNBD maintenance contracts on the Town's mission critical switches, routers and firewall. The Town does not have backup equipment it can use in the event of failure. The SmartNET will give the town the ability to quickly replace the defective equipment. Second, the Recommended Budget includes funds for the hiring of a GIS Administrator. The Town has been preparing for roll out of GIS for several years, but it is essential if we are to achieve Sudbury's goal of establishing an integrated, easy to use, multi-departmental enterprise GIS

system, that a new position be created to assist with the development and implementation of the GIS Town wide system.

Otherwise, the Town Manager Recommended Budget and Level Services Budget are the same. Both include funds to maintain the same personnel and basic expenses of keeping up with a large inventory of hardware and software to support numerous Town departments.

This department has become critical to the continued operation of all other departments and missions of the Town and cuts to the Town Manager's Recommended Budget should be avoided. This department is struggling with an increasing workload and has no real clerical support.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>INFORMATION SYSTEMS</b>						
Technology Administrator	73,464	75,116	75,316	75,316	75,316	75,316
Non-clerical	44,403	54,021	58,036	58,036	58,036	58,036
GIS Administrator	-	-	-	56,709	-	56,709
Sick Leave Buy Back	1,714	1,727	1,731	1,731	1,731	1,731
Summer Help	7,510	10,016	10,724	10,724	10,724	10,724
<b>Sub Total: Personal Services</b>	<b>127,091</b>	<b>140,880</b>	<b>145,808</b>	<b>202,516</b>	<b>145,808</b>	<b>202,516</b>
General Expense	5,000	5,000	5,000	5,000	5,000	5,000
Software	35,045	40,045	42,845	42,845	42,845	42,845
Maintenance	10,000	10,000	10,000	10,000	10,000	10,000
Travel	1,000	1,100	1,100	1,100	1,100	1,100
Contracted Services	18,400	18,400	19,100	24,600	19,100	24,600
Equipment	50,000	50,000	50,000	50,000	50,000	50,000
Professional Development	4,350	4,350	4,350	4,350	4,350	4,350
WAN/Telephone Connections	11,500	11,500	11,500	11,500	11,500	11,500
Network	5,000	5,000	5,000	5,000	5,000	5,000
Internet	10,000	10,000	10,000	10,000	10,000	10,000
<b>Sub Total: Expenses</b>	<b>150,295</b>	<b>155,395</b>	<b>158,895</b>	<b>164,395</b>	<b>158,895</b>	<b>164,395</b>
<b>Total: Information Systems</b>	<b>277,386</b>	<b>296,275</b>	<b>304,703</b>	<b>366,911</b>	<b>304,703</b>	<b>366,911</b>



**GENERAL GOVERNMENT: Committee for Preservation of Town Documents**

**MISSION OF THE OFFICE**

This committee was created to insure that documents are properly archived and preserved.

**DESCRIPTION OF SERVICES**

The Committee for the Preservation of Town Documents is responsible for preserving and microfilming current and ancient Town documents.

**STAFFING**

There is no staff associated with this budget, as the committee has successfully relied on volunteers within the committee for handling work needs. The Town Clerk's office also works with this committee as needed.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

This budget has been increased by \$250, due to the increased cost of archiving town documents.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>COMMITTEE FOR PRESERVATION AND MANAGEMENT OF DOCUMENTS</b>						
General Expenses	1,000	1,500	1,750	1,750	1,600	1,750
<b>Sub Total: Expenses</b>	<b>1,000</b>	<b>1,500</b>	<b>1,750</b>	<b>1,750</b>	<b>1,600</b>	<b>1,750</b>
<b>Total: Doc. Preservation</b>	<b>1,000</b>	<b>1,500</b>	<b>1,750</b>	<b>1,750</b>	<b>1,600</b>	<b>1,750</b>

## **GENERAL GOVERNMENT: Town Clerk and Registrars**

### **MISSION OF THE OFFICE**

The mission of the Town Clerk's Office is to safeguard the vital records and elections process of the Town through the use of professional administrative practices, in order to preserve the Town's vital and historical records and the integrity in elections.

### **DESCRIPTION OF SERVICES**

State law provides that the Town Clerk is the official keeper of the Town Seal and the Town's Oath Book. The Town Clerk oversees and ensures all statutory and by-law required functions are correctly and efficiently performed. In conjunction with the Board of Selectmen's Administrative Assistant, Town Moderator and Town Counsel the Town Clerk insures well run Town Meetings and submits general bylaw and zoning bylaw amendments at the close of Town Meeting to the Attorney General for approval. She records and certifies all official actions of the Town, including Town Meeting legislation and appropriations, Planning, Zoning Board and Board of Appeals decisions and signs all notes for borrowing. The Town Clerk serves as chief election official; oversees polling places, election officers, and the general conduct of all elections; directs preparation of ballots, polling places, voting equipment, voting lists, administers campaign finance laws, certifies nomination papers and initiative petitions and serves on the local Board of Registrars. The Town Clerk's Office conducts the annual town census, prepares the street list of residents and furnishes the jury list to the Office of the Jury Commissioner. The Town Clerk and some members of her staff also are Notaries Public and have the authority to notarize documents signed in their presence. The Town Clerk serves as the custodian of Town records and official documents. She is responsible for the maintenance, preservation and disposition of all Town records. She is required by State Law to ensure that Town records are readily available for public inspection.

### **STAFFING**

Staffing includes a Town Clerk, an Assistant Town Clerk, one full-time Census and Documentation Coordinator, and two part-time clerical positions. The Town Clerk, along with the Board of Registrars, oversees all elections held in Sudbury, and her office includes the salaries for part-time poll workers and police details associated with elections.

### **FY08 GOALS AND INITIATIVES**

- Continue to implement Help America Vote Act
- Run flawless elections; train 75 election workers up to speed regarding HAVA and new elections procedures.
- To work with IT to implement the Electronic Unified Archiving Solution software that will manage Town's documents and records, to provide the ability to archive documents securely, while providing efficient access
- Town Clerk will attend conservation and preservation of documents workshops
- Work with the Community Preservation Committee to request monies regarding preserving old vital records, documents and ledgers.
- To inventory basement storage of records that have not been inventoried and indexed.
- Continue to make the Town Clerk website even more user-friendly and provide additional information and links to services and voting procedures.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continued to more fully utilize the storage area in the Town Hall to house old records.

- Expanded computerized office procedures for future reference and ease of processing.
- Implemented cost saving renovations that extended the function of current filing cabinets and storage instead of purchasing new equipment at significant savings to the Town.
- Expanded the information available on the Town Clerk website and improved accessibility to information and documents.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Certified Vital Records and Burial Permit Issued:</b>	<b>1,352</b>	<b>1,242</b>
<b>Business Certificates Issued</b>	<b>175</b>	<b>154</b>
<b>Generated and Mailed Yearly Census</b>	<b>6,062</b>	<b>6,110</b>
<b>Returned and processed</b>	<b>90.25%</b>	<b>95.70%</b>
<b>Number of processed new registered voters</b>	<b>877</b>	<b>541</b>
<b>Official Voter Population</b>	<b>11,028</b>	<b>10,891</b>
<b>Official Population</b>	<b>18,107</b>	<b>18,207</b>
<b>Registered Dogs</b>	<b>2,055</b>	<b>2,098</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses. An additional amount has been included for tuition and travel due to additional course requirements for certification for the Town Clerk. This budget will be adequate if no more than four elections take place in FY08 allowing for a special election if necessary.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN CLERK &amp; REGISTRARS</b>						
Town Clerk	59,139	60,465	51,673	51,673	51,673	51,673
Overtime	800	1,000	1,000	1,000	1,000	1,000
Clerical	116,631	115,576	123,813	123,813	123,813	123,813
Election Workers	8,000	14,000	14,000	14,000	14,000	14,000
Registrars	956	956	956	956	956	956
<b>Sub Total: Personal Services</b>	<b>185,526</b>	<b>191,997</b>	<b>191,442</b>	<b>191,442</b>	<b>191,442</b>	<b>191,442</b>
General Expense	12,180	12,363	12,548	12,548	12,548	12,548
Computer	1,750	1,750	1,750	1,750	1,750	1,750
Maintenance	200	200	200	200	200	200
Travel	670	670	750	750	750	750
Tuition	700	700	1,500	1,500	1,500	1,500
Elections	8,000	14,000	14,000	14,000	14,000	14,000
Equipment	1,500	1,500	1,500	1,500	1,500	1,500
<b>Sub Total: Expenses</b>	<b>25,000</b>	<b>31,183</b>	<b>32,248</b>	<b>32,248</b>	<b>32,248</b>	<b>32,248</b>
<b>Total: Town Clerk &amp; Registrars</b>	<b>210,526</b>	<b>223,180</b>	<b>223,690</b>	<b>223,690</b>	<b>223,690</b>	<b>223,690</b>

## **GENERAL GOVERNMENT: Conservation**

### **MISSION OF THE OFFICE**

The Sudbury Conservation Commission was established in 1962 to protect local natural resources and features and to act as stewards of the Town's conservation properties. One of the Conservation Commission's most important responsibilities is protecting the ecological integrity of Sudbury's wetlands and the surrounding landscape

### **DESCRIPTION OF SERVICES**

The Commission is responsible for implementing and enforcing the Massachusetts Wetlands Protection Act and the Sudbury Wetlands Administration Bylaw. The Conservation Commission manages the Town's nine conservation lands for public enjoyment. These properties and the Sudbury River offer many opportunities for outdoor recreation. One major goal is to increase public awareness and appreciation of the many ways in which our local plants, wildlife, and natural landscape add to the quality of life in our community. As part of educational efforts the Conservation Commission leads public walks, speaks to elementary school science classes, and teaches field workshops for local scout groups. The Conservation Coordinator is responsible for preparing the Open Space and Recreation Plan for the Town, which enables the town to receive state reimbursement for land acquisition projects, and assists in review and negotiations for new land purchases.

### **STAFFING**

Current staffing for the Conservation Commission office includes a full-time Conservation Coordinator, and a part-time clerical position.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Permit applications</b>	<b>78</b>	
<b>Wetland Violations Actions</b>	<b>14</b>	

### **BUDGET ISSUES**

New Budget Initiatives for FY08: None

Both the Town Manager's Level Services and Recommended Budget includes funds for creation of a part-time shared analyst position to assist the Conservation Coordinator with all the responsibilities she is responsible for, up to 15 hours per week, and also assist in the Health Office up to 15 hours per week. Currently, each office has only one professional staff member, and when that person is out of the office or on vacation or out sick, there is no one else who can assist customers with their technical questions or issues. These two managers, (as well as the Assistant Town Manager/Personnel Director and the Finance Director/Treasurer-Collector – see their respective budgets), are the only department heads in the Town who have continued conducting the work of offices by themselves. Towns of similar size and demands have two or even three professional staff members in these offices. This is considered a level services budget item because it will allow these two offices to provide a level of service that has dropped in the past several years below unacceptable levels.

This bare bones staffing pattern has been on the priorities list to address as soon as the Town was able to deal with the staffing problems in the police, fire and DPW departments, which was accomplished in the FY06 and the FY07 budget. Reasons why this situation must be addressed in FY08:

- Currently, each of these two managers spend far too much of their time on tasks that can be handled by someone at a lower grade, and higher level tasks get postponed or worse, finished by deadlines but in a hurried manner.
- In the Health Department, the mandates from state and federal government in areas such as pandemic and hazardous materials planning, development of medical reserve programs and other preparations has become a near full-time job, leaving our current Health Director little time to be in the office or doing soils testing work.
- In the Conservation Office, the number of applications for permits, as well as inquiries from property owners has increased dramatically over recent years. Further the complexity of projects has increased. Land is being developed now that was passed by in earlier years due to the amount of wetland or environmental sensitivity issues.
- In both offices, the incumbents have worked for the Town for many years and are approaching ages where they may decide to retire. The Town needs backup staffing both for when these individuals are out, but also to gain knowledge from the incumbents so that the Town is not left in a lurch if one of the department heads left the Town's employ.

I note that trail maintenance is a public safety issue, and the small amounts allotted for maintenance mean that the Town is not able to keep the trails well maintained for the public when they are walking on conservation land. Nor have we been able to dedicate any funds for creating trails on newly acquired conservation land. While this office has been organizing volunteers to help with trail maintenance efforts, this is a problem that will need to be addressed in the future.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>CONSERVATION</b>						
Conservation Coordinator	61,297	62,676	63,076	63,076	63,076	63,076
Staff Assistant			17,153	17,153	-	17,153
Clerical	10,269	10,421	10,888	10,888	10,888	10,888
Sick Leave Buy Back	1,413	1,441	1,494	1,494	1,494	1,494
<b>Sub Total: Personal Services</b>	<b>72,979</b>	<b>74,538</b>	<b>92,611</b>	<b>92,610</b>	<b>75,458</b>	<b>92,610</b>
General Expense	1,660	1,660	1,660	1,660	1,660	1,660
Clothing	600	300	300	300	300	300
Trail Maintenance	3,000	3,000	3,000	3,000	3,000	3,000
Travel	275	650	650	650	650	650
<b>Sub Total: Expenses</b>	<b>5,535</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>	<b>5,610</b>
<b>Total: Conservation</b>	<b>78,514</b>	<b>80,148</b>	<b>98,221</b>	<b>98,220</b>	<b>81,068</b>	<b>98,220</b>

## **GENERAL GOVERNMENT: Planning and Community Development Department**

### **MISSION OF THE DEPARTMENT**

The mission of the department is to provide technical advisory services and coordination of town officials, committees, and commissions on issues involving planning, zoning, land management, development/re-development and affordable housing.

### **DESCRIPTION OF SERVICES**

The department provides staff services on a regular basis, directly to the Planning Board, Zoning Board, Board of Selectmen, Community Preservation Committee, Design Review Board, Community Housing Committee, Historical Commission, and Historic Districts Commission. They also provide services for the Conservation Commission and the Board of Health. The department processes and reviews development applications, coordinates land acquisition projects, and communicates town projects and goals to the public via the website and other media. Additionally, this department assists with budget preparations for the various boards and committees, coordinates data collection and serves as advisors to the Town Manager on all issues relating to land use, planning, zoning and development.

### **STAFFING**

The personnel in the department include a full-time Director of Planning and Community Development, a part-time Assistant Planner (funded partially with CPA funds), a part-time Community Housing Specialist (funded entirely with CPA funds) and a part-time clerical position. The Assistant Planner and Community Housing Specialists positions were added to the department in FY07, as was a recording secretary to attend Planning Board meetings bi-monthly.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Subdivision Applications Filed</b>	<b>1</b>	<b>3</b>
<b>Subdivision Lots Approved</b>	<b>15</b>	<b>13</b>
<b>Senior Development Permit Applications Filed</b>	<b>1</b>	<b>1</b>
<b>Senior Development Units Approved</b>	<b>33</b>	<b>52</b>
<b>Comprehensive Permits Filed</b>	<b>2</b>	<b>1</b>
<b>Comprehensive Permit Units Approved</b>	<b>0</b>	<b>45</b>
<b>Affordable Housing Units Constructed</b>	<b>0</b>	<b>2</b>
<b>Site Plan Applications Reviewed</b>	<b>4</b>	<b>3</b>

### **FY08 GOALS AND INITIATIVES**

- Seek funding to supplement Town funding for office staff, including CPC funding for CPC related projects and increased fees for 40B projects
- Continue Town Center Project process
- Continue Traffic Management process, working with DPW Director and Police Chief
- Work with Housing Trust to develop affordable housing
- Progress on Route 20 wastewater project
- Continue work on major zoning bylaws, i.e., Earth Removal, farm animals, Low Impact Development
- Continue assessing the impacts to Sudbury of the Wayland Town Center project

- Complete RFPs on Melone and Mahoney feasibility
- Update Community Preservation Committee Report

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Hired Assistant Planner and Community Housing Specialist
- Walkway Planning and Prioritization Initiative begun
- Formed Housing Trust
- Created Guidelines for 40B developments
- Became Monitoring Agent for local 40B developments
- Completed the Heritage Landscape Inventory program through MA Department of Conservation and Recreation
- Completed Willis Road walkway
- Coordinated review of major development projects with Conservation Coordinator, Health Director, Public Works Director, Fire Chief and Building Inspector

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget and Level Services Budget are the same for this Department. Both show an increase already incurring for FY07 in required, level services. They are as follows: A night-time recording secretary is required approximately 5 hours per week to attend Planning Board meetings. This increase better reflects the time and effort required for all Planning Board meeting activities. The budget also includes a \$500 increase for general expense. The recent increase in staffing and the overall expansion in department responsibilities have required additional office supplies and fixtures.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PLANNING BOARD &amp; DESIGN REVIEW BOARD</b>						
Town Planner	72,982	80,019	86,371	86,371	86,371	86,371
Assistant Planner	6,000	24,000	23,650	23,650	23,650	23,650
Clerical	23,822	25,127	32,367	32,367	28,075	32,367
Stipend	-	-	1,000	1,000	1,000	1,000
<b>Sub Total: Personal Services</b>	<b>102,804</b>	<b>129,146</b>	<b>143,387</b>	<b>143,387</b>	<b>139,095</b>	<b>143,387</b>
General Expense	2,000	2,000	2,500	2,500	2,500	2,500
Professional Development	400	750	750	750	750	750
Clothing Allowance	125	125	125	125	125	125
<b>Sub Total: Expenses</b>	<b>2,525</b>	<b>2,875</b>	<b>3,375</b>	<b>3,375</b>	<b>3,375</b>	<b>3,375</b>
<b>Total: Planning Board</b>	<b>105,329</b>	<b>132,021</b>	<b>146,762</b>	<b>146,762</b>	<b>142,470</b>	<b>146,762</b>



**GENERAL GOVERNMENT: Board of Appeals**

**MISSION OF BOARD**

The Board of Appeals is a statutory Board provided for by Massachusetts State law as well as Sudbury's own bylaws. In the broadest sense, it exists to grant relief from the Town's Zoning Bylaw when literal enforcement would constitute hardship to the property owner without significant impairment of the public welfare and/or without being substantially more detrimental to the adjoining neighborhoods.

**DESCRIPTION OF SERVICES**

The Board acts as one of Sudbury's special permit granting authorities, hears applications for comprehensive permits under G.L. c.40B and considers applications for relief from the Town's Zoning Bylaw. The ZBA is comprised of five members appointed by the Board of Selectmen. Several associate members are also appointed to serve in place of the regular members as needed. The associate members also serve as full members of the Earth Removal Board.

**STAFFING**

Staff consists of a part-time clerical position.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Total Cases Filed</b>	<b>50</b>	<b>57</b>
<b>Tear down applications filed</b>	<b>10</b>	<b>14</b>
<b>Comprehensive Permit applications filed</b>	<b>2</b>	<b>1</b>
<b>Pre-existing, non-conforming lots or structures</b>	<b>6</b>	<b>9</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget and Level Services Budget are the same, and contain funds to maintain the same personnel and basic, unavoidable expenses.

The workload of this office depends on the number of applications filed. The increase in normal permits filed, and number of lengthy projects submitted, such as those associated with a comprehensive permit (40B), has required additional clerical hours. The increased permit processing and associated hearings are estimated to require an additional 5 hours per week or more, than what has been budgeted for FY07. While the Town Manager's Recommended Budget for FY08 requests an additional \$6,000 in wages to cover this increase in hours, the net financial impact may be greatly reduced by permit application fee revenues, should the Town authorize the creation of an Application Fee Revolving Fund (pursuant to Chapter 44, s. 53E ½). Revolving fund revenues in its first year of operation (in FY08) are expected to be \$4,000. Failure to fund this budget line item request, or to establish the aforementioned revolving fund will undoubtedly require a reserve fund transfer to each year to cover shortfalls.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BOARD OF APPEALS</b>						
Clerical	23,840	24,342	31,072	31,072	25,072	31,072
<b>Sub Total: Personal Services</b>	<b>23,840</b>	<b>24,342</b>	<b>31,072</b>	<b>31,072</b>	<b>25,072</b>	<b>31,072</b>
General Expense	1,850	1,850	1,850	1,850	1,850	1,850
<b>Sub Total: Expenses</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>	<b>1,850</b>
<b>Total: Board of Appeals</b>	<b>25,690</b>	<b>26,192</b>	<b>32,922</b>	<b>32,922</b>	<b>26,922</b>	<b>32,922</b>
<b>OFFSET Application Revolving</b>	-		4,000	4,000	4,000	4,000
<b>Net Board of Appeals</b>	<b>25,690</b>	<b>26,192</b>	<b>28,922</b>	<b>28,922</b>	<b>22,922</b>	<b>28,922</b>

# PUBLIC SAFETY SERVICES



**Sudbury Fire  
Headquarters**

**Sudbury Police  
Station**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PUBLIC SAFETY</b>						
Police	2,345,053	2,530,756	2,584,379	2,584,379	2,564,379	2,584,379
Fire	2,567,006	2,642,637	2,706,804	2,728,454	2,668,904	2,721,354
Building Department	810,242	906,484	962,190	968,690	962,190	968,690
Dog Officer	11,341	11,502	12,483	12,483	10,755	12,483
<b>Total Public Safety</b>	<b>5,733,642</b>	<b>6,091,379</b>	<b>6,265,857</b>	<b>6,294,007</b>	<b>6,206,229</b>	<b>6,286,907</b>

**MISSION OF THE DEPARTMENT**

The mission of the Sudbury Police Department is to work with all residents of the community to create a positive partnership emphasizing equality, fairness, integrity and professionalism. Our objective is to provide the most responsive and highest quality police services possible by working in a collaborative proactive manner with the community to identify and solve problems, prevent crime, and apprehend offenders in a manner consistent with established State, and local laws.

**DESCRIPTION OF SERVICES**

The Sudbury Police Department provides a complete range of public safety and community-based services including: criminal investigation, motor vehicle law enforcement, preventive patrol and emergency response. The Department provides crime prevention programs, services to youth, D.A.R.E., and the processing of permits including firearms, door to door solicitors', raffles and public assembly.

**STAFFING**

The Sudbury Police Department has a sworn staff of 29 personnel (one chief, two lieutenants, five sergeants, and twenty-one patrol officers) plus four dispatchers and two administrative positions.

**FY07/08 GOALS AND INITIATIVES**

- To totally implement traffic safety program in the community and continue to develop a community relations plan so that residents are aware of how to access the program to ensure their traffic concerns are addressed.
- To complete all aspects of the departments radio frequency re-banding required by the FCC.
- To continue moving forward with the process of the building of the proposed new police station.
- Update aging department radio transmitter and receiver using state grant monies.
- To continue progress on completing the Department Policies and Procedures and the State Accreditation process.
- Continue to participate in the Town's Local Emergency Planning Committee with the goal of attaining certification

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Working with the Town Manager, DPW Director and Town Planner to create an active traffic safety program which is now in its initial stages.
- The Police Station Feasibility Study is completed and the Design phase of the project will be ready to bring to Town Meeting in 2007.
- Worked with the Assistant Town Manager/Personnel Director in progressing towards getting the Sudbury Police Department fully staffed with high quality personnel in all positions.
- Continued progress on the Department Policies and Procedures, with 60% of them completed and instituted and the goal of having them all completed by July, 2007.

- Continued progress on the Accreditation Process, with the goal of receiving Accreditation by July 1, 2007.
- Participated in the Town's Local Emergency Planning Committee, having obtained a provisional certification
- Have improved the quality and quantity of information on Police Department web site.
- Have integrated the School Departments student roster information into the Reverse 911 system and have run successful town wide tests of the system.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
Calls for Service	17,979	18,364*
Arrests	285	253
Response to motor vehicle accidents	706	646
911 Calls Received	2,186	2309

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Recommended Budget is the same as the Level Services Budget as no new budget initiatives are requested this year. In FY07 fuel costs were incorporated into the Police Department's budget from the Department of Public Work's budget. In light of this being the first fiscal year, necessary adjustments have become apparent. In forecasting the total funding necessary for fuel costs we have estimated an additional \$14,000 will be needed to fully fund the account by utilizing the costs from the first three months of FY07. Some of the explanations for increases in the Level Services budget compared to the FY07 budget are as follows:

- Anticipated increases in the state contract pricing for cruiser purchases as well as the decreased trade-in values results in \$5,000 needed to fully fund the account.
- Increases in service agreements for hardware/ software maintenance have resulted in an increase of \$1,800 relative to the Live Scan Fingerprint System. There was also an increase of \$200 a year on the costs of the mobile lap top computers air time (CDMA).
- The Metropolitan Law Enforcement Council membership dues have increased by \$500.
- To help maintain the appropriate communications among officers in an emergency an increase of \$1,500 is needed to purchase Nextel Phones to be placed in the six cruisers that do not have one currently and in addition as a backup to our current radio system during an emergency situation.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>POLICE DEPT</b>						
Police Chief	114,133	115,845	130,265	130,265	130,265	130,265
Lieutenant	164,116	174,341	181,699	181,699	181,699	181,699
Patrol Officers	1,272,628	1,387,233	1,371,058	1,371,058	1,371,058	1,371,058
Night Differential	20,300	20,300	20,300	20,300	20,300	20,300
Overtime	197,583	197,583	217,583	217,583	197,583	217,583
Clerical	91,428	94,654	91,478	91,478	91,478	91,478
Dispatchers	162,266	152,631	160,836	160,836	160,836	160,836
Sick Leave Buy Back	5,500	5,500	5,665	5,665	5,665	5,665
Holiday Pay	14,506	14,506	14,941	14,941	14,941	14,941
Non-accountable Clothing	-	8,942	10,730	10,730	10,730	10,730
Stipend	30,850	31,350	31,350	31,350	31,350	31,350
<b>Sub Total: Personal Services</b>	<b>2,073,310</b>	<b>2,202,885</b>	<b>2,235,905</b>	<b>2,235,905</b>	<b>2,215,905</b>	<b>2,235,905</b>
General Expense	54,818	52,083	54,083	54,083	54,083	54,083
Maintenance	56,015	60,750	62,750	62,750	62,750	62,750
Travel	2,500	2,500	3,000	3,000	3,000	3,000
Uniforms	28,520	20,508	17,790	17,790	17,790	17,790
Tuition	10,000	10,000	10,000	10,000	10,000	10,000
Equipment	7,500	7,500	7,500	7,500	7,500	7,500
Gasoline	-	62,140	75,961	75,961	75,961	75,961
<b>Sub Total: Expenses</b>	<b>159,353</b>	<b>215,481</b>	<b>231,084</b>	<b>231,084</b>	<b>231,084</b>	<b>231,084</b>
Police Cruisers	112,390	112,390	117,390	117,390	117,390	117,390
<b>Sub Total: Capital</b>	<b>112,390</b>	<b>112,390</b>	<b>117,390</b>	<b>117,390</b>	<b>117,390</b>	<b>117,390</b>
<b>Total: Police</b>	<b>2,345,053</b>	<b>2,530,756</b>	<b>2,584,379</b>	<b>2,584,379</b>	<b>2,564,379</b>	<b>2,584,379</b>
<b>OFFSET COP FAST</b>	-	30,000	23,266	23,266	23,266	23,266
<b>Net Police</b>	<b>2,345,053</b>	<b>2,500,756</b>	<b>2,561,113</b>	<b>2,561,113</b>	<b>2,541,113</b>	<b>2,561,113</b>

**PUBLIC SAFETY: Fire Department**

**MISSION OF THE DEPARTMENT**

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

**DESCRIPTION OF SERVICES**

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

**STAFFING**

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

**FY08 GOALS AND INITIATIVES**

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

**FY06/FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

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

**PERFORMANCE/WORKLOAD INDICATORS**

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

## **BUDGET ISSUES**

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

New Budget Initiatives for FY08: The Town Manager's Recommended Budget requests funds to add one position which will help reduce overtime expenditures, keep open all three fire stations and allow for the expenses of providing the same level of fire protection and emergency medical services as is currently provided in FY07. Note that due to the anticipated savings on overtime from adding one more firefighter position, the net on this budget is less than \$15,000, plus there is an increase in the benefits budget for one additional position.

Otherwise, the Town Manager's Recommended Budget and the Level Services Budget are the same. Since energy costs have continued to increase, the budget for gasoline and diesel fuel has been increased, as has the cost of utilities for the three stations operated by the Fire Department. Replacement of the Chief's vehicle occurs under this budget and will result in the release of a retired but good quality emergency response car to another department, relieving budget pressures elsewhere.

The Chief requested that the amount for tuition for courses taken by firefighters has be increased, as departmental personnel have indicated their intention to take courses and the language of the contract requires that funds be available for those courses. However, I plan to ask the Finance Committee to earmark the additional \$7,100 requested for tuition in the Reserve Fund, so that if departmental personnel do not take the courses, these funds can be reallocated to other uses.



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>FIRE DEPT</b>						
Fire Chief	97,221	102,675	114,155	114,155	114,155	114,155
Assistant Chief	73,073	73,073	88,039	88,039	88,039	88,039
Firefighters/EMTs	1,624,400	1,631,256	1,617,408	1,665,973	1,617,408	1,665,973
Overtime	350,399	350,399	364,949	330,934	364,949	330,934
Clerical	31,259	33,471	31,372	31,372	31,372	31,372
Dispatchers	113,271	119,351	123,931	123,931	123,931	123,931
Non-accountable Clothing	-	22,000	23,300	23,300	23,300	23,300
Sick Buy Back	3,323	12,060	14,737	14,737	14,737	14,737
<b>Sub Total: Personal Services</b>	<b>2,292,946</b>	<b>2,344,285</b>	<b>2,377,890</b>	<b>2,392,440</b>	<b>2,377,890</b>	<b>2,392,440</b>
General Expense	32,810	34,010	40,985	40,985	40,985	40,985
Maintenance	95,500	61,156	63,000	63,000	63,000	63,000
Alarm Maint.	1,500	3,000	3,000	3,000	3,000	3,000
Travel, In State	500	500	500	500	500	500
Utilities	-	42,880	52,770	52,770	52,770	52,770
Uniforms	38,500	17,800	18,800	18,800	18,800	18,800
Tuition	15,000	15,000	15,000	22,100	22,100	15,000
Contracted Services	19,000	34,000	36,500	36,500	36,500	36,500
Equipment	26,250	26,250	28,750	28,750	28,750	28,750
Gasoline/Diesel Fuel	-	18,756	24,609	24,609	24,609	24,609
<b>Sub Total: Expenses</b>	<b>229,060</b>	<b>253,352</b>	<b>283,914</b>	<b>291,014</b>	<b>291,014</b>	<b>283,914</b>
Capital Items	45,000	45,000	45,000	45,000	-	45,000
<b>Sub Total: Capital Expenses</b>	<b>45,000</b>	<b>45,000</b>	<b>45,000</b>	<b>45,000</b>	<b>-</b>	<b>45,000</b>
<b>Total: Fire</b>	<b>2,567,006</b>	<b>2,642,637</b>	<b>2,706,804</b>	<b>2,728,454</b>	<b>2,668,904</b>	<b>2,721,354</b>
<b>OFFSET Ambulance Fund</b>	<b>210,189</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>	<b>230,342</b>
<b>Net Fire</b>	<b>2,356,817</b>	<b>2,412,295</b>	<b>2,476,462</b>	<b>2,498,112</b>	<b>2,438,562</b>	<b>2,491,012</b>

## **PUBLIC SAFETY: Building Department**

### **MISSION OF THE DEPARTMENT**

The mission of the Building Department is to contribute to the protection of the public through the enforcement of building codes and zoning bylaws. The Building Department is also responsible for keeping many Town Buildings safe, clean, healthy and energy-efficient for use by the public and Town employees.

### **DESCRIPTION OF SERVICES**

The Building Department staff enforces State building, electrical, plumbing, gas and mechanical codes, as well as local zoning by-laws and Architectural Access Board Regulations. Many of the functions of the Department are mandated by the Commonwealth of Massachusetts, including enforcement and implementation of the State building code, the State zoning act, the State gas and plumbing codes, and the State architectural access code. Additional local codes and standards must also be enforced. Staff issue permits, inspect construction sites, conduct periodic safety inspections of restaurants, schools, religious institutions, and other places of assembly, and levy fines or prosecute when necessary to obtain code compliance. This office processes 2,000 permits a year, with three to seven inspections per permit.

The Building Maintenance function of this department plans and budgets for the energy needs of Town buildings, secures contracted cleaning services and performs preventative maintenance and minor repairs on Town Buildings including the Town Hall, the Flynn Building, the DPW Building, Loring Parsonage, the Police Station and the Fairbank Community Center. Staff maintains the exterior walkways, including leaf pick up, snow removal, and sanding of these buildings as well. Additionally this department maintains three residential structures owned by the Town: the Haynes Meadow House, the Carding Mill House, and the Frost Farmhouse. Finally, they are responsible for interoffice mail delivery.

### **STAFFING**

This office consists of the Building Inspector, an Assistant Building Inspector, an Electrical Inspector/Supervisor of Buildings, a Plumbing Inspector (part-time), two custodians, a part-time zoning enforcement field agent, and an administrative assistant. In addition to his various inspection and facilities maintenance functions, the Building Inspector also work with the Permanent Building Committee on major projects for repair, renovation and new construction of Town buildings.

### **FY08 GOALS AND INITIATIVES**

- Continue working with Technology Director to purchase and install permit software with funds appropriated by Town Meeting.
- Improve the heating distribution system throughout the Fairbank Community Center.
- Continue the Flynn beautification project, adding fencing to screen the generator and air conditioner on the west side, as well as, paint the building. Continue replacing the single pane glass windows with more energy efficient windows at Flynn.
- Continue to maintain town's three residential structures and work with the Town Manager to determine best use for town owned properties.

- Seek CPC funding for FY09 for hiring consultants to begin design plans for the restoration of Town Hall.
- Continue to address office space issues at Flynn and DPW; find office space for staff in the Planning Office and the Building Department.
- Work with Public Works Director and Planning and Land Use Director to develop a plan for installing parking lot lights in the rear of the Town Hall.
- Obtain rebates from Keyspan for the installation of New Energy savings heating appliances.

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Completed construction of a new office for the Finance Director and storage for Accounting, in the Flynn Building.
- Continued the progress of the Flynn beautification with the reconstruction of the rear bulkhead, the replacement of 8 windows in the Flynn basement, installation of an irrigation system along with new professional installed landscaping and re-roofing the pitched roof.
- Completed the replacement of the 34 year old boiler in the Flynn Building by adding a new, more energy efficient boiler.
- Completed the installation of two new boilers and two new hot water heaters at the Fairbank Community Center. New lighting, painting and insulation of the boiler room have also been completed.
- Renovated the Haynes Meadow House in order to go out to bid as a rental property. Currently, the house is rented and the department provides property maintenance and security for tenant.
- Hired a new full time Building Inspector to fill the position formerly held by Jack Hepting.
- Assisted Town Manager in securing favorable electricity and natural gas contracts for the supply of the respective utilities.
- Constructed new storage facility for the Town Clerk’s office and assisted with office renovations in the Clerk’s office.
- Continued assisting the Permanent Building Committee in their efforts to solve the indoor air quality problem at the new DPW building.
- Successfully went out to bid for the contracted cleaning services at the Fairbank Community Center Building.

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>New Residents Permits</b>	<b>22</b>	<b>28</b>
<b>New Residents Permits (value)</b>	<b>\$9,571,000</b>	<b>\$9,830,400</b>
<b>Tear down and Reconstructions</b>	<b>15</b>	<b>16</b>
<b>Tear down and Reconstructions (value)</b>	<b>\$3,986,000</b>	<b>\$5,477,200</b>
<b>Non-Residential Permits</b>	<b>30</b>	<b>33</b>
<b>Non-Residential Permits (value)</b>	<b>\$3,606,500</b>	<b>\$2,870,900</b>
<b>Swimming Pools</b>	<b>13</b>	<b>17</b>
<b>Swimming Pools (value)</b>	<b>\$365,000</b>	<b>\$465,700</b>
<b>Additions/Renovations</b>	<b>335</b>	<b>355</b>
<b>Additions/Renovations (values)</b>	<b>\$19,009,600</b>	<b>\$16,837,000</b>

## **BUDGET ISSUES**

New Initiatives for FY08: None

The Town Manager's Recommended Budget and the Level Services level services budget are the same amount. The overall increase is \$55,706 over FY07 appropriations. Similar to last year, the majority of this increase is due to utility costs. Last year we had a 33% increase in utilities. Much of this increase was due to the sharp increase of the cost of natural gas and the fact that we were at the end of our 5-year, fixed-price contract. This year we anticipate our utilities to increase approximately 10% over last year.

Both budgets provide for an additional \$9,900 for building maintenance. This increase is to provide additional annual maintenance and testing of the DPW Building HVAC system. This system has been problematic and additional testing and maintenance is critical to detecting and fixing any problems in this HVAC system.

The department request budget includes one capital building project. The \$15,000 initiative for the building improvement is earmarked for the replacement of the roof shingles at the Frost Farm House.

Finally, the Department Request budget contains an increase for contracted services to provide cleaning services at the Loring Parsonage, based on the assumption that the Sudbury Foundation will be moving out; in which case Town will be responsible for such cleaning until a new, suitable tenant is found. However, this budget request is not recommended for funding at this time.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BUILDING DEPT.</b>						
Inspector	70,020	71,595	74,155	74,155	74,155	74,155
Supv. of Town Bldgs.	54,417	55,634	55,834	55,834	55,834	55,834
Asst. Bldg Inspector	34,997	54,045	53,567	53,567	53,567	53,567
Clerical	40,714	49,670	51,160	51,160	51,160	51,160
Deputy Inspector	2,640	2,640	2,640	2,640	2,640	2,640
Zoning Enforcement Agent	7,000	7,000	7,000	7,000	7,000	7,000
Plumbing/ Gas Inspector	27,183	-	-	-	-	-
Sealer of Weights	2,150	2,150	2,150	2,150	2,150	2,150
Wiring Inspector	13,050	13,050	13,050	13,050	13,050	13,050
Custodial	81,406	82,627	85,094	85,094	85,094	85,094
Sick Buyback	-	-	1,309	1,309	1,309	1,309
<b>Sub Total: Personal Services</b>	<b>333,577</b>	<b>338,411</b>	<b>345,960</b>	<b>345,960</b>	<b>345,960</b>	<b>345,960</b>
General Expense	3,500	4,200	4,200	4,200	4,200	4,200
Utilities	266,790	356,198	394,955	394,955	394,955	394,955
Town Mgr Bldg. Maint.	119,900	120,000	129,900	129,900	129,900	129,900
Vehicle Maintenance	1,000	1,500	1,500	1,500	1,500	1,500
Contracted services	66,200	66,200	66,200	72,700	66,200	72,700
Uniforms	1,475	1,475	1,475	1,475	1,475	1,475
In-State Travel	2,800	3,000	3,000	3,000	3,000	3,000
<b>Sub Total: Expenses</b>	<b>461,665</b>	<b>552,573</b>	<b>601,230</b>	<b>607,730</b>	<b>601,230</b>	<b>607,730</b>
Building Improvements	15,000	15,500	15,000	15,000	15,000	15,000
<b>Sub Total: Capital Expenses</b>	<b>15,000</b>	<b>15,500</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>	<b>15,000</b>
<b>Total: Building</b>	<b>810,242</b>	<b>906,484</b>	<b>962,190</b>	<b>968,690</b>	<b>962,190</b>	<b>968,690</b>

**PUBLIC SAFETY: Dog Officer**

**MISSION OF THE OFFICE**

The Dog Officer is responsible for enforcement of dog control laws and investigation of complaints. Some of these calls are particularly difficult and required many hours of staff time.

**DESCRIPTION OF SERVICES**

The Dog Officer responds to complaints from residents and when appropriate brings complaints to the Board of Selectmen for a hearing on possible measures to control dogs who are nuisances or dangerous.

**STAFFING**

This office is staffed by one part-time dog officer supplemented with backup/coverage from a local contractor that specializes in Canine Control.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The budget maintains the same personnel and basic, unavoidable expenses of meeting this department's mission.

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY04	FY05
<b>Calls for Service</b>	<b>904</b>	<b>781</b>
<b>Dogs Picked up</b>	<b>28</b>	<b>29</b>

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>DOG OFFICER</b>						
Dog Officer	8,897	9,030	9,301	9,301	9,301	9,301
Sick Leave Buy Back	674	684	705	705	705	705
<b>Sub Total: Personal Services</b>	<b>9,571</b>	<b>9,714</b>	<b>10,005</b>	<b>10,005</b>	<b>10,005</b>	<b>10,005</b>
General Expense	400	400	750	750	750	750
Vehicle Maintenance	200	200	540	540	-	540
Contracted Services	1,170	1,188	1,188	1,188	-	1,188
<b>Sub Total: Expenses</b>	<b>1,770</b>	<b>1,788</b>	<b>2,478</b>	<b>2,478</b>	<b>750</b>	<b>2,478</b>
<b>Total: Dog Officer</b>	<b>11,341</b>	<b>11,502</b>	<b>12,483</b>	<b>12,483</b>	<b>10,755</b>	<b>12,483</b>

# Public Works Department



Public Works  
Building

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PUBLIC WORKS</b>						
Engineering	344,477	361,944	391,518	391,518	376,482	391,518
Streets and Roads	2,016,873	2,131,578	2,336,597	2,361,597	2,305,097	2,361,597
Trees and Cemetery	287,477	305,800	329,647	339,647	324,647	339,647
Parks and Grounds	234,256	269,523	285,761	299,191	276,783	299,191
<b>Total Public Works</b>	<b>2,883,083</b>	<b>3,068,845</b>	<b>3,343,523</b>	<b>3,391,953</b>	<b>3,283,009</b>	<b>3,391,953</b>

## **PUBLIC WORKS: Engineering and Administration**

### **MISSION OF THE OFFICE**

The Department of Public Works is a professional team committed to improving the quality of life in Sudbury and supporting the Town's core values. We make every effort to maximize the efficient, effective use of our resources in the support, maintenance and upkeep of the infrastructure, public lands and programs. We are committed to public safety and providing prompt, courteous quality service to our customers and each other.

### **DESCRIPTION OF SERVICES**

The Engineering division of this department is responsible for the design of public works projects, plan review of proposed developments, implementation of a GIS system, and assistance on Town and School building projects. The Division also provides a wide range of technical assistance to other departments and committees, including the Planning Department, Building Inspection Department, Conservation Department, Recreation Department, Police and Fire Departments and the Town Manager's office. Many other customers are supported as well, including residents, businesses, contractors, consultants, and realtors as well as State and Federal entities. The Engineering Division stores, maintains and updates public records and plans, and designs and administers public works project of all kinds. Construction plans and documents are prepared, reviewed, and bid; construction inspections are performed and overseen by staff.

The Town Engineer also serves as the Director of the Public Works Department and as such reports directly to the Town Manager and serves on the Town Manager's Senior Management Team. As DPW Director, he oversees the management of \$3.3 million in appropriations, and provides executive level planning and direction to five divisions, and 35 employees. Services provided by these employees affect the Town's public safety, community character, property values and quality of life. Further, he serves on the Town's land use planning working group, a staff task force chaired by the Planning and Community Development Director, to evaluate and help guide all development proposals made to various offices of the Town.

### **STAFFING**

The engineering division staff consists of the Town Engineer/DPW Director, Assistant Town Engineer, one Civil Engineer, one Junior Civil Engineer, a part-time Engineering Aide in the summer, and an Office Manager. This office has two fewer staff persons than it had in 1990, which has limited the projects it can support.

### **FY08 GOALS AND INITIATIVES**

- Continue property line survey, base line survey, topographic survey and design of the Marlboro Road/Willis Road Intersection.
- Provide topographic survey, right-of-way survey for the Wayside Inn and Route 20 intersection.
- Provide as-built survey of Mt. Pleasant North Cemetery and New Town Cemetery.



- DPW Director/Town Engineer to serve as lead staff on the regional all hazards mitigation project (required by Homeland Security/FEMA/MEMA in order to qualify for grants).
- DPW Director/Town Engineer to serve as key department head on Town Center Redesign project
- DPW Director/Town Engineer to continue to serve as lead department head on Rail Trail Conversion Advisory Committee.
- DPW Director/Town Engineer to serve as lead department head on the Solid Waste Options Committee
- Continue to plan for and coordinate with Mass Highway regarding projects needed at intersections on Route 20

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

- Provided construction layout for the Concord Road/Union Ave. intersection.
- Provided topographic survey, right-of-way survey and drainage design for Dakin Road at Blacksmith Drive.
- Provided construction layout for the Willis Road Walkway.
- Continued developing and updating data layers for Town's Geographical Information System.
- Worked with the Town of Wayland's committee established to investigate creation of a consolidated Public Works Department in that town.

### **BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager's Level Services and Recommended Budget are the same; both restore a part-time engineering aide position to the Engineering Division by converting a current summer intern position into a full-time engineering aide position. This additional position is an attempt to restore to level service capacity this office, cut in previous years, and is badly needed due to the inspectional services and construction verification demands on this office.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets are the same as FY07. This budget does not advance GIS efforts at a time when the Town is trying to move ahead on our GIS program.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ENGINEERING DEPARTMENT</b>						
Dir. of Public Works	97,330	100,945	108,149	108,149	108,149	108,149
Engineering Staff	169,727	180,113	184,965	184,965	184,965	184,965
Clerical	39,125	41,257	43,189	43,189	43,189	43,189
Summer Help	13,756	14,598	30,072	30,072	15,036	30,072
Sick Leave Buy Back	4,946	5,253	4,190	4,190	4,190	4,190
<b>Sub Total: Personal Services</b>	<b>324,884</b>	<b>342,166</b>	<b>370,565</b>	<b>370,565</b>	<b>355,529</b>	<b>370,565</b>
General Expense	14,718	14,718	14,718	14,718	14,718	14,718
Maintenance	2,500	2,500	2,500	2,500	2,500	2,500
Travel	100	110	110	110	110	110
Uniforms	2,275	2,450	3,625	3,625	3,625	3,625
<b>Sub Total: Expenses</b>	<b>19,593</b>	<b>19,778</b>	<b>20,953</b>	<b>20,953</b>	<b>20,953</b>	<b>20,953</b>
<b>Total: Engineering</b>	<b>344,477</b>	<b>361,944</b>	<b>391,518</b>	<b>391,518</b>	<b>376,482</b>	<b>391,518</b>

## **PUBLIC WORKS: Streets and Roads**

### **MISSION OF THE OFFICE**

The mission of the Streets and Roads Division is to protect the safety, health and welfare of the Town Residents by maintaining the town streets, walkways and storm water system in a safe and clean condition. This department also provides for the safe movement of vehicular traffic by performing minor construction repairs, removing snow and ice from streets, sweeping of streets, installing traffic signs and lane or line markers and supervising the work of contractual service providers who perform repairs, cleaning or maintenance work. In addition, the Road Machinery Division ensures that the Town's fleet is always operational and well maintained by providing an efficient and effective maintenance and repair program and fuel management system.

### **DESCRIPTION OF SERVICES**

The Streets and Roads cost center is responsible for maintenance, construction, and snow removal of Town ways, including streets, curbing, walkways, drain systems, guardrails and signs. Priority snow removal is given to all school parking lots and driveways. Additional duties include roadside and sidewalk mowing, brush clearance, litter control, seasonal support to other town departments (parades, elections, facility maintenance, celebrations). The department maintains approximately 140 miles of roads and 45 miles of walkways. This division annually evaluates street and walkway conditions as part of the pavement management plan.

### **STAFFING**

Division staffing includes a Director of Operations, a Management Analyst, one Full-time Secretary, one Part-time Secretary, one Mechanic, one Assistant Mechanic, two Foremen, two Crew Leader/Heavy Equipment Operators, five Heavy Equipment Operators, two Light Equipment Operators and one Heavy Laborer.

### **FY08 GOALS AND INITIATIVES**

- Continue to update the snow plowing fleet as well as other trucks and equipment.
- Maintain town-wide infrastructure including street sweeping, traffic lines, paving, walkways, drain systems, guardrails, signs and snow removal programs.
- Continue to implement vigorous vehicle maintenance program to keep town fleet in compliance with safety and preventative maintenance schedules.
- Implement new Pavement Management Program software, including vehicle maintenance and parts inventory modules

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

- Administered mandatory street sign replacement program.
- Continued to build on website visibility to inform residents of maintenance and special projects being performed in the town.
- Reconstructed 3 miles of walkways.
- Constructed 2,000 ft. of new walkways along Willis Road.
- Installed 6,000 ft of wood guardrail.
- Arrowhead Road reconstructed

## PERFORMANCE/WORKLOAD INDICATORS

Indicator	FY05	FY06
Miles of Roads Maintained		140
Drainage Structures Repaired	25	30
Guard Rail Installed	2,000 ft.	6,000 ft.
Pieces of Equipment Maintained	68	90

## BUDGET ISSUES

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is higher than the Level Services Budget request by \$25,000, which is assigned to the vehicle maintenance account. The Town continues to operate with an aged fleet of trucks, sanders and other equipment, all needing more parts and servicing from the mechanics. This division has begun a better preventative maintenance program now that there are two mechanics; that too requires more in parts and materials.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets provide the same service levels as FY07, but with a number of adjustments for cost increases, primarily due to the increases in materials used by this division. Given the much higher costs of gasoline, that line item has been increased by \$25,896. The roadwork account is also up by \$50,000, as costs and materials in this account go up similarly to the energy costs over this past year. Snow & Ice expenditures are also expected to increase in FY08. The Town has deficit spent this particular expense category in recent years due to severe conditions as well as higher than anticipated cost of salt and other road safety materials.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>STREETS &amp; ROADS</b>						
Highway Dir. of Operations	-	63,156	65,825	65,825	65,825	65,825
Management Analyst	63,207	66,819	71,791	71,791	71,791	71,791
Non-Clerical	538,796	567,483	577,261	577,261	577,261	577,261
Overtime	21,353	21,353	21,353	21,353	21,353	21,353
Clerical	47,983	50,466	52,186	52,186	52,186	52,186
Summer Temp. Labor	4,872	4,872	5,018	5,018	5,018	5,018
Sick Leave Buy Back	1,146	1,419	1,462	1,462	1,462	1,462
<b>Sub Total: Personal Services</b>	<b>677,357</b>	<b>775,568</b>	<b>794,896</b>	<b>794,896</b>	<b>794,896</b>	<b>794,896</b>
General Expense	11,500	11,500	12,000	12,000	11,500	12,000
Gasoline	141,240	114,104	140,000	140,000	135,000	140,000
Bldg. Maintenance	9,661	12,500	16,000	16,000	15,000	16,000
Vehicle Maintenance	102,038	104,588	152,138	177,138	127,138	177,138
Utilities	12,500	12,500	13,250	13,250	13,250	13,250
Street Lighting	62,600	53,475	53,475	53,475	53,475	53,475
Travel	200	200	200	200	200	200
Uniforms	17,045	17,045	17,045	17,045	17,045	17,045
Tuition	1,500	1,500	1,500	1,500	1,500	1,500
Police detail	40,000	40,000	42,500	42,500	42,500	42,500
Roadwork	400,500	450,000	500,000	500,000	500,000	500,000
<b>Sub Total: Expenses</b>	<b>798,784</b>	<b>817,412</b>	<b>948,108</b>	<b>973,108</b>	<b>916,608</b>	<b>973,108</b>
Vehicle Leases/Purchases	237,628	185,313	178,938	178,938	178,938	178,938
<b>Sub Total: Capital Expenses</b>	<b>237,628</b>	<b>185,313</b>	<b>178,938</b>	<b>178,938</b>	<b>178,938</b>	<b>178,938</b>
Snow & Ice Overtime	92,783	106,089	117,407	117,407	117,407	117,407
Snow & Ice Contractors	72,275	96,655	106,520	106,520	106,520	106,520
Snow & Ice Materials	138,046	150,541	190,728	190,728	190,728	190,728
<b>Sub Total: Snow &amp; Ice</b>	<b>303,104</b>	<b>353,285</b>	<b>414,655</b>	<b>414,655</b>	<b>414,655</b>	<b>414,655</b>
<b>Total: Streets &amp; Roads</b>	<b>2,016,873</b>	<b>2,131,578</b>	<b>2,336,597</b>	<b>2,361,597</b>	<b>2,305,097</b>	<b>2,361,597</b>

## PUBLIC WORKS: Trees and Cemetery

### MISSION OF THE DIVISION

The Mission of this division is twofold: (1) to protect and keep in a healthy state an important public asset of the Town – the beautiful shade trees that are found in the Town’s public way and (2) the cemetery division staff provides compassionate, courteous and professional service to bereaved families and strives to maintain a tranquil, well-maintained environment with perpetual care and beautiful historic cemetery grounds.

**DESCRIPTION OF SERVICES**

The Trees and Cemetery Division is responsible for maintenance and interments at the Town’s five cemeteries. Tree responsibilities include maintenance and removal of trees in the public way, with attention to plantings, trimming, storm damage repairs, vandalism repairs, tree and stump removals, as well as care and watering of newly planted trees.

**STAFFING**

Division staffing includes a Foreman, one Crew Leader/Heavy Equipment Operator, two Heavy Equipment Operators, one Light Equipment Operator, one part-time clerical position, and one part-time summer help.

**FY08 GOALS AND INITIATIVES**

- Continue with perpetual care at all five cemeteries.
- Continue to maintain streetscapes
- Continue to clear intersections and walkways of brush to improve safety.

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Expanded New Town Cemetery.
- Expanded Mt. Pleasant Cemetery

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
Tree Removals	54	58
Interments	55	52
Cemetery Maintenance	27 Acres	31 Acres

**BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager’s Recommended Budget is higher than the Level Services Budget request by \$10,000, which funds the beginning of a “shade tree” planting program. The Town’s character is changing as dying trees are taken down for public safety reasons, however funding limitations have not allowed for their replacement.

Otherwise, the Town Manager Recommended Budget and Level Services Budgets provide the same service levels as FY07, but with an increase in the cost of tree removal services from a contractor for the estimated same level of tree removal work.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TREES &amp; CEMETERY</b>						
Non-Clerical	205,975	215,512	220,525	220,525	220,525	220,525
Overtime	8,638	8,638	8,638	8,638	8,638	8,638
Clerical	7,342	7,743	7,251	7,251	7,251	7,251
Summer help	4,872	4,872	5,018	5,018	5,018	5,018
<b>Sub Total: Personal Services</b>	<b>226,827</b>	<b>236,765</b>	<b>241,432</b>	<b>241,432</b>	<b>241,432</b>	<b>241,432</b>
Cemetery Materials	20,650	22,835	23,325	23,325	23,325	23,325
Tree Planting				10,000		10,000
Tree Contractors	40,000	46,200	64,890	64,890	59,890	64,890
<b>Sub-Total: Expenses</b>	<b>60,650</b>	<b>69,035</b>	<b>88,215</b>	<b>98,215</b>	<b>83,215</b>	<b>98,215</b>
<b>Total: Trees &amp; Cemetery</b>	<b>287,477</b>	<b>305,800</b>	<b>329,647</b>	<b>339,647</b>	<b>324,647</b>	<b>339,647</b>

## **PUBLIC WORKS: Parks and Grounds**

### **MISSION OF THE OFFICE**

The Mission of this division is to maintain landscaping throughout the Town in park and field areas, public right-of-ways and around all public buildings and school grounds.

### **DESCRIPTION OF SERVICES**

The Parks and Grounds division is responsible for maintenance of all Town parks, fields, and playgrounds. This includes Josiah Haynes, Peter Noyes, General John Nixon, Israel Loring, Ephraim Curtis Middle, Featherland Field, Davis Field, Frank Grinnell Veterans Memorial Park, Haskell Field, Fairbank Community Center, Frank G. Feeley Field, Cutting Field, Horse Pond Play Field, Heritage Park, Central Fire Station, North Fire Station, DPW Building, Police Station, Goodnow Library, Town Common, Frost Farm, Piper Farm, Meachen Field, Davis Farm, Barton Farm, Mahoney Farm and Carding Mill Conservation areas. Maintenance of these facilities includes mowing, aerating, fertilizing, irrigation, line striping and system maintenance, weed and insect control; litter clean-up, leaf removal, leveling, grading and marking fields, fence and vandalism repairs; shrub and tree care, and support for civic activities.

### **STAFFING**

Division staffing includes a Foreman, one Crew Leader/Assistant Mechanic, one Heavy Equipment Operator, one Light Equipment Operator, one part-time clerical position, and part-time summer help.

### **FY08 GOALS AND INITIATIVES**

- Continued maintenance of irrigation systems, athletic fields, conservation areas, school grounds and public parks and grounds.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Oversee a new contract for maintenance of school grounds.

### **PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
Mowing Conservation Land	50.0 Acres	81.0 Acres
Public Lands	94.5	94.5
Public Schools	33.57	33.57

### **BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is higher than the Level Services Budget request by \$13,430 to add to the current contract for periodic landscaping maintenance of the elementary schools so that certain Town buildings – the Goodnow Library, Fire Station, Police Station, and Town Hall. would get twice a year intensive cleaning, trimming, etc.. Similar attention already given to the school grounds has hugely improved their appearance. This line item increase would allow the same level of attention to the Town buildings.



Otherwise the Recommended Budget and the Level Services Budget keep the same level of service as FY07. The budget provides for funds to hire two more summer employees. The Town has acquired acres more of Conservation land in recent years, and mowing of this Conservation land in particular needs more attention than current staffing can provide.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>PARKS &amp; GROUNDS</b>						
Non-Clerical	177,260	183,207	185,285	185,285	185,285	185,285
Overtime	3,100	3,120	3,120	3,120	3,120	3,120
Clerical	7,342	7,743	7,251	7,251	7,251	7,251
Summer help	8,717	8,717	17,957	17,957	8,979	17,957
Sick Leave Buy Back	2,129	2,408	2,480	2,480	2,480	2,480
<b>Sub Total: Personal Services</b>	<b>198,548</b>	<b>205,195</b>	<b>216,093</b>	<b>216,093</b>	<b>207,115</b>	<b>216,093</b>
Maintenance	25,640	54,260	59,400	72,830	59,400	72,830
Uniforms	2,800	2,800	3,000	3,000	3,000	3,000
<b>Sub Total: Expenses</b>	<b>28,440</b>	<b>57,060</b>	<b>62,400</b>	<b>75,830</b>	<b>62,400</b>	<b>75,830</b>
Capital Expense	7,268	7,268	7,268	7,268	7,268	7,268
<b>Sub Total: Capital Expenses</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>	<b>7,268</b>
<b>Total: Parks &amp; Grounds</b>	<b>234,256</b>	<b>269,523</b>	<b>285,761</b>	<b>299,191</b>	<b>276,783</b>	<b>299,191</b>

# HUMAN SERVICES



**Sudbury Senior Center at the  
Fairbank Community Building**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HUMAN SERVICES</b>						
Board of Health	344,099	351,743	376,621	376,620	359,468	376,620
Council on Aging	137,388	148,998	155,367	158,988	155,367	158,988
Youth Commission	37,973	39,549	42,507	42,507	42,007	42,507
Veterans Affairs	17,922	18,079	18,398	18,398	18,398	18,398
<b>Total Human Services</b>	<b>537,382</b>	<b>558,369</b>	<b>592,893</b>	<b>596,513</b>	<b>575,240</b>	<b>596,513</b>

**DESCRIPTION OF SERVICES**

The Board of Health is responsible for addressing the health needs of the community. Traditional duties include site evaluation for subsurface sewage disposal, permitting/licensing and inspections for food service establishments, summer camps, public swimming pools, stables, massage therapists, septic installers and haulers, septic system and private well installations, and supplying community nursing and mental healthcare services, as well as involvement in environmental health issues such as housing code violations, mosquito control, hazardous waste, animal/rabies control, public ground water supplies and emergency preparedness.

**STAFFING**

This department consists of the Health Director, two part-time social workers who job share, and a full-time office coordinator. Nursing, mental health, and senior outreach services are provided on a contract basis. Mosquito control is provided as part of a regional district, to which Sudbury pays an annual fee. The annual Household Hazardous Waste Day requires a licensed contractor for the collection. Animal/Rabies control services are provided through a contract as well.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None for this office

The Town Manager's Recommended Budget and the Level Services Budget includes funds for creation of a part-time shared analyst position to assist in the Health Office up to 15 hours per week, and also assist in the Conservation Department up to 15 hours per week. This is not included as a new initiative, but rather as a way to protect the level services capabilities of these two offices. Currently, each office has only one professional staff member, and when that person is out of the office or on vacation or out sick, there is no one else who can assist customers with their technical questions or issues. These two managers, (as well as the Assistant Town Manager/Personnel Director and the Finance Director/Treasurer-Collector – see their respective budgets), are the only department heads in the Town who have continued conducting the work of offices by themselves that in other towns of similar size and demands have two or even three professional staff members.

This bare bones staffing pattern has been on the priorities list to address as soon as the Town was able to deal with the staffing problems in the police, fire and DPW departments, which was accomplished in the FY06 and the FY07 budget. Reasons why this situation must be addressed in FY08:

1. Currently, each of these two managers spend far too much of their time on tasks that can be handled by someone at a lower grade, and higher level tasks get postponed or worse, finished by deadlines but in a hurried manner.
2. In the Health Department, the mandates from state and federal government in areas such as pandemic and hazardous materials planning, development of medical reserve programs and other preparations has become a near full-time job, leaving our current Health Director little time to be in the office or doing his soils testing work.
3. In the Conservation Office, the number of applications for permits, as well as inquiries from property owners has increased dramatically over recent years. Further the

complexity of projects has increased. Land is being developed now that was passed by in earlier years due to the amount of wetland or environmental sensitivity issues.

4. In both offices, the incumbents have worked for the Town for many years and are approaching ages where they may decide to retire. The Town needs back up both for when these individuals are out, but also to gain knowledge from the incumbents so that the Town is not left in a lurch if one of the department heads left the Town's employ.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>BOARD OF HEALTH</b>						
Director	72,881	74,521	74,721	74,721	74,721	74,721
Town Social Worker	63,028	63,981	66,055	66,055	66,055	66,055
Non-Clerical	-	-	17,153	17,153	-	17,153
Clerical	39,168	38,842	40,007	40,007	40,007	40,007
Sick Buy Back	1,117	1,428	1,765	1,765	1,765	1,765
<b>Sub Total: Personal Services</b>	<b>176,194</b>	<b>178,772</b>	<b>199,702</b>	<b>199,701</b>	<b>182,549</b>	<b>199,701</b>
General Expense	1,900	1,900	1,900	1,900	1,900	1,900
Maintenance	100	100	100	100	100	100
Mental Health	29,560	29,560	29,560	29,560	29,560	29,560
Nursing Services	47,440	48,390	49,842	49,842	49,842	49,842
Contracted Services	9,800	10,900	10,900	10,900	10,900	10,900
Lab Expense	500	500	500	500	500	500
Hazardous Waste	17,000	18,700	18,700	18,700	18,700	18,700
Mosquito Control	40,780	41,596	44,092	44,092	44,092	44,092
Animal/ Rabies Control	8,600	8,600	8,600	8,600	8,600	8,600
Animal Inspector	1,725	1,725	1,725	1,725	1,725	1,725
Senior Outreach	6,000	6,500	7,500	7,500	7,500	7,500
Community Outreach Prog	4,500	4,500	3,500	3,500	3,500	3,500
<b>Sub Total: Expenses</b>	<b>167,905</b>	<b>172,971</b>	<b>176,919</b>	<b>176,919</b>	<b>176,919</b>	<b>176,919</b>
<b>Total: Board of Health</b>	<b>344,099</b>	<b>351,743</b>	<b>376,621</b>	<b>376,620</b>	<b>359,468</b>	<b>376,620</b>

## **HUMAN SERVICES: Council on Aging**

### **MISSION OF THE DEPARTMENT**

The mission of the Council on Aging (COA) is dedicated to serving the social, recreational, health and educational needs of older adults in the community. The Sudbury Senior Center has been a fully accredited center since December 2003; one of only seven in Massachusetts.

### **DESCRIPTION OF SERVICES**

The Council on Aging supports programs at the Sudbury Senior Center, provides van services for elders, serves as an information resource for seniors and their families, coordinates numerous volunteer services to elders in the community, and plays an advocacy role for seniors at the local, state, and federal level.

### **STAFFING**

The department currently consists of the Council on Aging Director, a 30 hour a week van driver, a full-time senior clerk and a part-time Information and Referral Specialist, all appointed by the Town Manager. In addition, many Sudbury residents volunteer countless hours helping to run the many programs at the Senior Center. The activities of the COA are overseen by a nine member volunteer Council on Aging, appointed by the Board of Selectmen.

### **FY08 GOALS AND INITIATIVES**

- Continue to increase transportation options for Sudbury seniors
- Work with other Town officials to develop a mechanism to allow Sudbury residents to donate funds to assist Seniors with property tax burdens
- Reach out to identify and make contact with all Sudbury residents aged 85 and older to offer services, support, and inclusion on the Emergency Assistance List
- Involve younger seniors in services and programming through multiple media avenues
- Serve as part of the Town's Emergency Planning efforts to develop an emergency response plan for seniors and people with disabilities who may be placed at risk due to weather or other events, including facilitating a subcommittee of the LEPC to coordinate the efforts of the senior housing communities and other town entities toward emergency planning.
- Survey people 50 and older who sell their homes to learn to what an extent property tax increases were a factor in a decision to leave Sudbury.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- The Director received Director Certification from the Massachusetts Association of Councils on Aging
- Worked with the Commission on Disabilities to promote advocacy for equal access for residents with disabilities
- Continued several initiatives to increase transportation alternatives for Sudbury seniors and those with disabilities, including implementing a new taxi voucher program, receiving a grant for a new Senior Center van, and working with the Town of Wayland to develop a two-town transportation collaborative and applying for a grant to hire a consultant for this project.
- Increased publicizing of Senior Center program offerings through press releases and website postings.

- Worked on monitoring and encouraging the development of property tax relief efforts for Seniors
- Working with the Sudbury police, fire, and public health departments, developed an Emergency Assistance List for residents who would like to be called in times of emergency.

**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
<b>Value of Volunteer Services</b>		
Hours	<b>7,600</b>	<b>8,357</b>
Dollar equivalent (per EOE formula)	<b>\$126,000</b>	<b>\$166,885</b>
<b>Program Attendance</b>	<b>1,880</b>	<b>2,100</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: Adding five hours for the Van Driver. Increasing the van driver's hours from 30 to 35 a week will provide greater transportation access for seniors and people with disabilities.

Under the Level Services Budget, the additional 5 hours for the Van Driver are not included.

The COA will continue to have to be very frugal under this budget, but will be able to maintain appropriate service levels.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>COUNCIL ON AGING</b>						
Director	53,743	58,825	61,846	61,846	61,846	61,846
Van Driver	25,674	25,027	26,781	30,401	26,781	30,401
Clerical	32,837	33,330	34,330	34,330	34,330	34,330
Information/Reference	18,134	19,816	20,410	20,410	20,410	20,410
<b>Sub Total: Personal Services</b>	<b>130,388</b>	<b>136,998</b>	<b>143,367</b>	<b>146,988</b>	<b>143,367</b>	<b>146,988</b>
General Expense	7,000	7,000	7,000	7,000	7,000	7,000
Contracted Services	-	5,000	5,000	5,000	5,000	5,000
<b>Sub Total: Expenses</b>	<b>7,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>	<b>12,000</b>
<b>Total: Council on Aging</b>	<b>137,388</b>	<b>148,998</b>	<b>155,367</b>	<b>158,988</b>	<b>155,367</b>	<b>158,988</b>

## **HUMAN SERVICES: Youth Commission**

### **MISSION OF THE OFFICE**

The mission of the Sudbury Youth Coordinator Department is to provide youth with activities that are appealing, safe, easily accessible and ultimately empowering. The goal is to also offer support and education to the parents of the community. Communication with students, parents, youth boards, and established groups is vital to providing these activities.

### **DESCRIPTION OF SERVICES**

The Youth Commission is responsible for addressing youth needs and concerns in the community. The population of the youth of Sudbury is growing. Now more than ever the community needs to provide for our youth. This division of the Town provides programs and activities that are safe as well as educational during the so-called non-learning hours.

Programs run by the Youth Coordinator include the Youth Action Committee, which works with the Youth Coordinator to run Coffee Houses at the LSRHS. These coffee houses are safe and positive events for older teens and the teens use the coffee houses to raise funds for charity. At the middle school level there are after school programs run by the Youth Coordinator as well as Park and Recreation programs designed for this age group. A middle school youth group has also been organized to help the Youth Coordinator generate ideas that will lead to more programming. Community service programming is also a focus for this age group. Some of the activities being offered are fall clean-up for Musketahquid Village in Sudbury, preparing a meal for the Salvation Army, and a joint venture with the Sudbury Veterans Agent to clean the gravesites of local veterans'.

### **STAFFING**

Staffing in this department consists of a full-time Youth Coordinator. She has clerical assistance from the Park and Recreation Administrative Assistant to the Park and Recreation Director and the Atkinson Pool front desk. The Youth Coordinator reports to the Park and Recreation Director.

### **FY08 GOALS AND INITIATIVES**

- Increase the number of Park and Recreation classes for Middle and High School aged residents.
- Work with the Youth Action Committee and Lincoln-Sudbury to improve the way information about community service is distributed.
- Work with the Senior Center on shared spacing issues
- Continue to expand summer program offerings

### **FY 06/07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Expanded summer programs to offer full week activities and options for High School Students (07)
- Create a pamphlet for 6th Grade parents that helped prepare them for the transition their child faced from elementary school to middle school (07)
- Offered an Internet Safety workshop for parents, co-sponsored by Curtis Middle School (06)

- Offered more community service opportunities (07)

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>6<sup>th</sup> Grade Pool Party</b>	<b>75 attended</b>	<b>98 attended</b>
<b>Coffee Houses</b>	<b>200 on average</b>	<b>85-325 attended</b>
<b>Get on the Bus Summer Program</b>	<b>0</b>	<b>5-15 per trip</b>
<b>Vacation Programs</b>	<b>8-25 per trip</b>	<b>5-17per trip</b>
<b>Internet Safety Workshop for Parents</b>	<b>0</b>	<b>40 attended</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget is the same as the Level Services Budget. No new initiatives are planned for this budget, but funds are included to continue the same level of activity and programming current successfully delivered.

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town Mgr 3% Budget FY08</b>	<b>Town Mgr Request FY08</b>
<b>YOUTH COMMISSION</b>						
Youth Coordinator	33,923	34,999	37,457	37,457	37,457	37,457
<b>Sub Total: Personal Services</b>	<b>33,923</b>	<b>34,999</b>	<b>37,457</b>	<b>37,457</b>	<b>37,457</b>	<b>37,457</b>
General Expense	450	450	450	450	450	450
Youth Programs	2,000	2,000	2,000	2,000	2,000	2,000
Professional Development	100	100	100	100	100	100
Travel	500	500	500	500	500	500
Transportation	1,000	1,500	2,000	2,000	1,500	2,000
<b>Sub Total: Expenses</b>	<b>4,050</b>	<b>4,550</b>	<b>5,050</b>	<b>5,050</b>	<b>4,550</b>	<b>5,050</b>
<b>Total: Youth Commission</b>	<b>37,973</b>	<b>39,549</b>	<b>42,507</b>	<b>42,507</b>	<b>42,007</b>	<b>42,507</b>



## HUMAN SERVICES: Veterans' Affairs

### MISSION OF THE OFFICE

The Mission of the Veterans' Affairs office is to help address the needs of Town veterans, widows, and families of the armed services.

### DESCRIPTION OF SERVICES

The Agent assists veterans in receiving State and Federal services as well as serves as the Veterans' Graves Agent.

### BUDGET ISSUES

New Budget Initiatives for FY08: None for this Office

The Town Manager's Recommended Budget requests assistance funds for one resident who is currently receiving benefits. If more residents request or need assistance, transfers will be requested from the Reserve Fund. The adequacy of this budget will depend on the needs of the veterans in the Town. As in past years, due to the unpredictability of this need, funds have been allocated into the Reserve Fund for any potential needs that arise.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>VETERANS AFFAIRS</b>						
Veteran Agent	10,472	10,629	10,948	10,948	10,948	10,948
<b>Sub Total: Personal Services</b>	<b>10,472</b>	<b>10,629</b>	<b>10,948</b>	<b>10,948</b>	<b>10,948</b>	<b>10,948</b>
General Expense	1,400	1,400	1,400	1,400	1,400	1,400
Veteran's Grave Markers	850	850	850	850	850	850
Veteran's Benefits	5,200	5,200	5,200	5,200	5,200	5,200
<b>Sub Total: Expenses</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>	<b>7,450</b>
<b>Total: Veterans Affairs</b>	<b>17,922</b>	<b>18,079</b>	<b>18,398</b>	<b>18,398</b>	<b>18,398</b>	<b>18,398</b>

# CULTURE & RECREATIONAL SERVICES



**Goodnow Library**

**Hosmer House**

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>CULTURE &amp; RECREATION</b>						
Goodnow Library	868,222	893,408	924,652	1,013,412	924,652	1,013,412
Recreation	117,740	124,271	124,950	191,650	124,951	144,865
Historical Commission	5,950	5,950	5,950	5,950	5,950	5,950
Historical Districts Commission	2,330	4,043	3,095	3,095	3,095	3,095
<b>Total Culture &amp; Recreation</b>	<b>994,242</b>	<b>1,027,672</b>	<b>1,058,648</b>	<b>1,214,107</b>	<b>1,058,647</b>	<b>1,167,322</b>

## CULTURE & RECREATION: Goodnow Library

### MISSION OF THE DEPARTMENT

The Goodnow Library is a lifelong recreational and learning/information resource and community center for Sudbury. The library assists users of all ages and interests in meeting personal, educational, vocational and social goals that contribute to their well being and to reaching their potential as individuals and as members of a democratic society. Goodnow strives to enhance the quality of life of all users, to strengthen the fabric of the Sudbury community and to promote a well informed and enlightened citizenry.

Goodnow's mission is to provide convenient and effective access to a wide array of print and electronic resources, direct and remote services and facilities relevant to the diverse recreational, informational, educational, social and cultural interests of the community. The Library also serves as a point of access (gateway) to materials and services beyond those it is able to offer locally. The trustees and staff strive to create a welcoming, stimulating and comfortable environment for people of all ages, interests and abilities. The Library emphasizes personal service, innovation, collaboration and cost effectiveness in carrying out its mission.

### DESCRIPTION OF SERVICES

The Goodnow Library is an automated library, a member of the Minuteman Library Network. The Library carries out five primary service roles in Sudbury. Its most prominent role is that of **Popular Materials Center**. From leisure reading to pursuing hobbies and cultural interests, use of library resources and activities is increasing for all ages. Acquiring sufficient print and non-print material to satisfy recreational and other leisure time interests is an on-going challenge.

As a **Formal Education and an Independent Learning Center**, Goodnow supports the personal learning and formal educational pursuits of residents. From strengthening job skills, researching consumer, health and financial information, to completing school assignments, the information and education needs of residents are expanding and becoming more sophisticated and diverse. They require a wider variety of library resources, skills, and services than ever before. (Nine years ago the library offered one public computer station; today it offers twenty-five, as well as a wireless network and popular web site.) Evaluating and integrating relevant emerging technologies into the Library's plan of service has become a major responsibility. The Library's participation in the Minuteman Library Network and its emphasis on Reference and Reader Advisory services exemplify its commitment to these important roles.

The significant growth in pre-school and early school age population in Sudbury has an impact on each of these roles. In recent years the Library has committed more resources towards being a **Pre-School Door to Learning** for younger children. It has introduced programs and resources to encourage and reinforce reading, listening and socializing skills to toddlers.

Goodnow's fifth role is as a **Community Center**. The Goodnow Library facility is used as a community meeting place ("commons") for socializing and sharing experiences and ideas. It is also a valued resource for individual pursuits. An estimated 200,000 plus

individuals visit Goodnow annually. Hundreds of meetings take place at Goodnow each year. Staff manages the facility's community resources – meeting rooms, audio-video system, exhibit and display areas, and supports the programming efforts of the Friends of the Goodnow Library. The Friends sponsor and present a wide variety of adult programs to the community. The Children's Department offers many regularly scheduled reading, story telling and craft programs. Special children's programs are planned by staff and funded by the Friends.

## **STAFFING**

Staffing consists of 4 full-time positions (Director, Assistant Director, Head of Circulation, and Children's Librarian), 22 adult part-time positions, 5 high school page positions, and 22 volunteers. The Library is open Monday – Wednesday 9 am to 9 pm; Thursday – Saturday 9 am to 5 pm; Sunday 2 pm – 5 pm.

The latest statewide public library reports show that Goodnow remains one of the busiest and most cost effective libraries in Massachusetts – supporting exceptionally high circulation (340,000) with a relatively small staff (14.6 FTE). Its ratio of circulations per full time equivalency is among the highest. Staffing at Goodnow is approximately 4 FTE's (140 fewer staff hours per week) than the average staffing of comparable libraries – libraries serving similar communities (size and make-up) with especially high activity. Staffing the Library at a level sufficient to support the community's exceptional use of library resources and services is an ever present challenge. The Library has consistently accepted the challenge of doing more with less by focusing on basic library services, capitalizing on efficiencies from automation and telecommunication, expanding a dedicated group of volunteers, working with the Friends of the Library, collaborating with other libraries and streamlining operations. However, as noted below, additional direct staff support is required to sustain the library. As part of its new Strategic Plan 2007-2010, Goodnow is requesting support for increasing staff in key areas: hours, core services and support staff.

## **FY07 GOALS**

- Implement Strategic Plan. Solicit input from Friends and Town Manager for final version. Present to Selectmen and community. Undertake goals/activities scheduled for 2007, including budget requests for FY08.
- Establish more effective communication and collaboration with school systems.
- Establish a pilot English conversation group to support residents interested in improving basic English speaking and listening skills. Rely on volunteers to run group.
- Continue to expand web services and resources offered through the Library's web site.
- Continue to evaluate RFID technology – self checkout and automatic check-in library system.
- Work with COA and others (volunteers) to offer delivery of library materials to homebound.

## **FY05/06 GOALS**

- a) Completed a draft for a new Strategic Plan: reviewed mission, evaluated data, conducted community survey, assessed strengths, weaknesses, opportunities and threats, and established goals for 2007-2010. The trustees approved a final draft of the plan in June, 2006.
- b) Received a grant from the Sudbury Foundation to continue the Sudbury Archives project. Over the next three years we will be incorporating historical records from 1850

- 1900 and enhancing the web site with features that will support the local history activities of the Sudbury school systems. We are coordinating this activity with the Town school system.
- c) Restored the evening hours lost 12 years ago. The Monday-Wednesday schedule added back 8:30 -9 p.m. to the evening schedule.
- d) Converted the Adult Services position into Assistant Director's position. Town supported adding part-time reference staff hours to make this possible.
- e) Enhanced the library resources and services available to the community through the Web -one of our most important on-going goals. We are establishing Goodnow's web site as Sudbury's digital branch library - a few key strokes away 24/7. We added a number of valuable remote access subscription databases in FY05 and 06. For example, Sudbury residents gained on-line access to approximately 1200 digitized adult audio book titles (best-sellers, book club favorites, and award-winners), 250 children's and young adult titles (Newbery and Caldecott winners and time-tested classics) and a large variety of foreign language courses. Each month bestsellers and classic are added. Using their Goodnow card, a Sudbury resident can download a tape from anywhere at any time. Users also gained the ability to reserve museum passes on-line.
- In addition to new subscription databases, Assistant Director Karen Tobin worked with staff to customize and create web resources for users. For instance, she and the Young Adult/Reference Librarian, Krista Armstrong-Moon, created two web pages for young adults - Homework Help and Looking for a Good Book?
- f) Strengthened young adult collections. Increased spending on young adult materials and saw a 20 percent increase in circulation.
- g) Evaluation of RFID technology – self checkout and automatic check-in library system.
- h) Established toddler story time.
- i) Painted exterior of 19th century wing.
- j) Added shelving in key areas of the Library.

#### **PERFORMANCE/WORKLOAD INDICATORS**

- Circulation up almost 70% over 8 years; 8% last year to over 340,000 annually
- Reference services up 60% over 15 years
- Resource sharing up 400% over 5 years – 60,000 annually
- Increase in services and responsibilities associated with supporting 41 user/staff PCs and a wireless network, maintaining a 32,000 sq. ft. facility that has more than 200,000 visitors a year, and developing Goodnow's electronic branch library (web site) with 148,000 visitors last year.

<b>Indicator</b>	<b>2004</b>	<b>2005</b>
<b>Circulation</b>	<b>304,629</b>	<b>340,585</b>
<b>Children's Programs</b>	<b>268</b>	<b>266</b>
<b>Children's Program Attendance</b>	<b>3,500</b>	<b>3,500</b>
<b>Meeting Rooms Use</b>		
<b>Meetings</b>	<b>233</b>	<b>245</b>
<b>Attendance</b>	<b>5,274</b>	<b>5,382</b>
<b>Library Visitors</b>	<b>200,000</b>	<b>200,000</b>
<b>Library Web Site Visitors</b>	<b>91,771</b>	<b>148,287</b>
<b>Resource Sharing</b>	<b>48,000</b>	<b>60,000</b>
<b>Reference/Advisory Questions</b>	<b>19,000</b>	<b>19,000</b>

## BUDGET ISSUES

New Budget Initiatives for FY08: The Town Manager's Recommended Budget is \$88,760 over the Level Services Budget. This increase in funding is the recommended level to achieve the goals defined by Goodnow's new Strategic Plan. The plan has been a two year effort. In addition to gathering local and comparative library data and soliciting input from staff, trustees, Friends and the Town Manager, the plan incorporates much of the information derived from a community survey on library services and resources. The recommendations for the Library fall into three categories: additional weekend and evening hours, effective support for core services and operations and increased purchasing power –books, audio-visual materials and electronic resources. The requests are consistent with past requests for additional support in these key areas.

1. Additional Weekend/Evening Hours: request 37 additional part-time hours to add Thursday evening (5-9) and Friday evening (5-6), restore a Sunday afternoon hour (1-2) and add three Sundays to the library schedule. As part of this proposal, three staff hours will be added to Saturday coverage to provide lunch coverage at each service desk and six page hours will be added evenings to keep up with shelving material. Most of the staff hours go to the lowest paid positions – Page and P-T Library Clerks. Cost: \$29,051. Evenings and weekends are extremely busy-working adults, families and students. Adding evening and weekend hours was the most frequent request of the community survey responses. In fact, these hours have been requested by users and the library for many years. Most of the surrounding towns are open four evenings. The Sunday afternoon hour (1-2) was lost twelve years ago due to budget reductions. Adding three Sundays to the schedule allows us to be open on Sundays throughout the school year.
2. Provide appropriate staffing to maintain core customer services: request 42 additional part-time hours to create effective and efficient support for the core services listed below. The hours will be distributed to four service areas. Eighty-four percent of the hours will be allocated to Library Clerks –lowest paid adult position. Cost: \$41,356.
  - a) Circulation and Children's desk services – add to weekday desk coverage at most critical times when one person is insufficient to manage desk services.
  - b) Youth Services. Provide Children's librarian, Assistant Children's librarian and Young Adult/Reference librarian with off desk time to meet with students, teachers and school librarians to better coordinate support for school assignments and to develop reading lists and guides—in print and on line. Allow library to expand children's and young adult book discussion programs.
  - c) Collection Development. Provide several staff members with a few off desk hours to create and analyze MLN collection reports to identify weak/dated and high demand collection areas and review selection tools for purchasing material. This will result in better decisions and turn around time for acquiring material.
  - d) Technical Services. There is a constant backlog of material to be cataloged and processed. The library needs to increase hours for cataloging and processing new materials and donations, mending items, cataloging, processing and preserving archival materials, and labeling materials to make them more accessible.
3. Increase Library Materials Budget: increase of \$12,000 to meet the community's extraordinary demand for library materials. This request is based on our circulation

and resource sharing figures, daily exchanges with residents and community survey responses. The survey documented a strong interest in improving depth, variety and currency of Children's, Young Adult, Adult Fiction and Non-Fiction and Reference resources in key areas. Our budget is lower than comparable libraries -10-20 percent.

4. Support Services: 14 additional page hours for shelving materials, maintaining shelf order, emptying book drops, and checking in material behind the scenes. Handle more than 400,000 items a year. Our goal is to use the lowest paid position as part of the answer to improving staff support. We have three fewer page hours now than in FY88 when circulation was less than half of current total. Cost: \$6,353.

On the other hand, the Level Services budget accomplishes none of these goals. Library Materials (\$6,250), Building Maintenance (\$1,100) and Automation (\$2,340) increases are due to cost increase to maintain level service in these areas. The average price for books and other library materials rose by 5 percent. The Automation increase reflects a six percent increase in Minuteman Library Network membership fees. The increase in Travel is offset by reductions in General Expenses -\$400.

The Level Services budget does not add hours to the library's schedule. It does not increase its book purchasing power or meet pressing staffing needs, such as service desk coverage, collection development, cataloging/processing and youth services. Goodnow is below comparable libraries in these areas. Since use of the library continues to grow, this budget does not maintain the status quo.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>GOODNOW LIBRARY</b>						
Library Director	79,378	81,164	81,364	81,364	81,364	81,364
Non-Clerical	482,171	485,809	506,191	582,951	506,191	582,951
Overtime	14,388	14,620	15,511	15,511	15,511	15,511
Custodial		-	-	-	-	-
Sick Leave Buy Back	2,657	2,698	2,779	2,779	2,779	2,779
<b>Sub Total: Personal Services</b>	<b>578,594</b>	<b>584,291</b>	<b>605,845</b>	<b>682,605</b>	<b>605,845</b>	<b>682,605</b>
General Expense	10,487	10,337	9,937	9,937	9,937	9,937
Automation	37,600	38,860	41,200	41,200	41,200	41,200
Books and Materials	117,000	124,900	131,150	143,150	131,150	143,150
Maintenance	86,960	21,960	23,060	23,060	23,060	23,060
Utilities	-	71,600	71,600	71,600	71,600	71,600
Travel	250	400	800	800	800	800
Contracted Services	37,331	41,060	41,060	41,060	41,060	41,060
<b>Sub Total: Expenses</b>	<b>289,628</b>	<b>309,117</b>	<b>318,807</b>	<b>330,807</b>	<b>318,807</b>	<b>330,807</b>
<b>Total: Goodnow Library</b>	<b>868,222</b>	<b>893,408</b>	<b>924,652</b>	<b>1,013,412</b>	<b>924,652</b>	<b>1,013,412</b>

## **CULTURE & RECREATION: Park & Recreation**

### **MISSION OF THE OFFICE**

The Mission of The Sudbury Park & Recreation Department is to provide recreation activities, leisure services, facilities and general amenities to the public. To enhance the quality of life for the Town of Sudbury residents by providing clean, safe and attractive parks and recreation facilities that promote a strong sense of community.

### **DESCRIPTION OF SERVICES**

The Park and Recreation Department offers a comprehensive and varied program of public recreation activities, services, and resources for Sudbury residents. Programs are self-sustaining and offer an opportunity for quality use of leisure time in a productive and healthy manner. A brochure is mailed to all in our database Five times a year with information on recreation, teen center, Youth Programs and Atkinson pool programs. Facilities include Atkinson Pool, Fairbank Community Center, Toddler playground, tennis courts, basketball courts, sand volleyball courts, outdoor skating area (weather permitting), and fields for baseball, field hockey, lacrosse, softball, and soccer. Major areas include Davis Field, Featherland Park, Frank G. Feeley Field, Cutting Field (Turf Field) and the Haskell Recreation area.

### **STAFFING**

The department covered by this budget consists of a full-time Recreation Director, an office coordinator, a program coordinator and a part-time teen center coordinator. A pre-school coordinator and many program staff, mostly part-time, are also part of the staff but they are paid out of revolving funds, which covers their salaries and benefits. Currently, only approximately half of the office coordinator and program coordinator's salary is paid out of the Town's budget, the rest are charged to the revolving funds.

### **FY08 GOALS AND INITIATIVES**

- Create an IPM Plan for the Town Fields
- Completion of the LS-Community Field project
- Continue efforts to bring financial stability and predictability to the Atkinson Park and Recreation Department
- Create RFP for the Development of Mahoney and Malone property.

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continue efforts to bring financial stability and predictability to the Atkinson Pool and Park and Recreation Department.
- We have secured funding for field master plan from the CPC and Capital development user fees for Mahoney and Malone.
- Worked with the Town Manger to secure additional field funding and work on ways to organize the three main departments to serve the community better. This was done by privatizing some duties securing better equipment.
- Completion of the Cutting Field Project



**PERFORMANCE/WORKLOAD INDICATORS**

Indicator	FY05	FY06
<b>Park &amp; Recreation Programs offered</b>	<b>694</b>	<b>749</b>
<b>Activity Participants</b>	<b>7,724</b>	<b>7,634</b>

**BUDGET ISSUES**

New Budget Initiatives for FY08: The Town Manager’s Recommended Budget maintains the Department’s ability to provide the current level of services by adding an additional 15 hours to the Program Coordinator’s position so that it is paid entirely out of the Town’s budget. The cost to the Town for this enhancement is just under \$20,000 for FY08. The change is recommended because this position continues to be responsible for more activities than what can be funded by user fees, and has become part of the overall management of the department.

The Town Manager’s Level Services Budget does not include this change, and funds the same level of staffing as currently exists in the department.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>RECREATION</b>						
Recreation Director	67,379	71,595	71,595	71,595	71,595	71,595
Non-Clerical	15,200	15,100	15,650	62,435	15,650	15,650
Program Coordinator	20,149	21,246	20,259	40,173	20,259	40,173
Clerical	15,012	15,830	16,947	16,947	16,947	16,947
<b>Sub Total: Personal Services</b>	<b>117,740</b>	<b>123,771</b>	<b>124,450</b>	<b>191,150</b>	<b>124,451</b>	<b>144,365</b>
Travel	-	250	250	250	250	250
Uniforms	-	250	250	250	250	250
<b>Sub Total: Expenses</b>	<b>-</b>	<b>500</b>	<b>500</b>	<b>500</b>	<b>500</b>	<b>500</b>
<b>Total: Recreation</b>	<b>117,740</b>	<b>124,271</b>	<b>124,950</b>	<b>191,650</b>	<b>124,951</b>	<b>144,865</b>

**CULTURE & RECREATION: Historical Commission**

**MISSION OF THE PROGRAM**

The Historical Commission is responsible for oversight of the following Town-owned historic properties: the Hosmer House, Loring Parsonage, Haynes-Garrison site, and the Soldier’s Training Field and works with the Town Manager to plan and implement efforts to maintain and protect these properties. In addition, the Commission maintains records for the Massachusetts Historical Commission.

**DESCRIPTION OF SERVICES**

The Historical Commission plan and carry out a variety of activities to help the community of Sudbury enjoy the Hosmer House and other historic properties owned by the Town. In recent year, the Commission has been requesting funds from the Community Preservation Act to implement various projects affecting the historic properties of the town.

**STAFFING**

The Commission receives no staffing from the Town, and maintains the Hosmer House with volunteers.

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget is exactly the same as the FY07 appropriated budget. Funds were approved through the Community Preservation Act (CPA) for a major restoration of the Hosmer House, so the Town Manager’s Recommended Budget should be adequate for their other needs. No additional funds are requested for this department beyond the Town Manager’s Recommended Budget amount.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HISTORICAL COMMISSION</b>						
General Expenses	5,950	5,950	5,950	5,950	5,950	5,950
<b>Sub Total: Expenses</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>
<b>Total: Historical Commission</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>	<b>5,950</b>

**CULTURE & RECREATION: Historic Districts Commission**

**MISSION OF THE OFFICE**

The Historic Districts Commission is responsible for assuring the appropriateness of building improvement in the Town’s Historic Districts.

**DESCRIPTION OF SERVICES**

Upon request from homeowners in three historic districts, the Commission approves Certificates of Appropriateness for construction, paint colors, and demolition.

**STAFFING** Staffing is provided by a part-time clerical position.

**FY06 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Extended the King Philip Historic District to include the Post Road at Mill Village and Concord Road at Codjer Lane.
- Maps and guidelines were mailed to homeowners and businesses in the historic district and to all Sudbury realtors.

**FY07/08 MAJOR INITIATIVES**

- Continue monitoring all historic districts for appropriate construction, paint colors, and demolition
- Issue certificates of appropriateness

**BUDGET ISSUES**

New Budget Initiatives for FY08: None

The Town Manager’s Recommended Budget is the same as FY07, except for the reduction in general expense to FY06 level. Additional funds were required in the FY07 to obtain and install six new signs indicating the location of the enlarged historic districts, per the vote of Town Meeting in 2005. The Town Manager’s Recommended Budget maintains the Department’s ability to provide the current level of services, but does not address the increased hours for the part-time clerk that the Commission has been seeking in recent years.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>HISTORIC DISTRICTS COMMISSION</b>						
Clerical	1,880	2,568	2,645	2,645	2,645	2,645
<b>Sub Total: Personal Services</b>	<b>1,880</b>	<b>2,568</b>	<b>2,645</b>	<b>2,645</b>	<b>2,645</b>	<b>2,645</b>
General Expenses	450	1,475	450	450	450	450
<b>Sub Total: Expenses</b>	<b>450</b>	<b>1,475</b>	<b>450</b>	<b>450</b>	<b>450</b>	<b>450</b>
<b>Total: Hist Dist Commission</b>	<b>2,330</b>	<b>4,043</b>	<b>3,095</b>	<b>3,095</b>	<b>3,095</b>	<b>3,095</b>

# UNCLASSIFIED AND TRANSFER EXPENSES



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN-WIDE OPERATIONS &amp; TRANSFER ACCOUNTS</b>						
Town-wide Operating Expenses	113,345	103,545	100,700	100,700	99,700	100,700
Transfer Accounts	200,000	318,274	351,574	351,574	351,574	351,574
<b>Total Town Mgr-wide &amp; Transfers</b>	<b>313,345</b>	<b>421,819</b>	<b>452,274</b>	<b>452,274</b>	<b>451,274</b>	<b>452,274</b>

## **UNCLASSIFIED – Town Wide Operating Expenses**

### **MISSION OF THE PROGRAM**

This budget provides a place to budget for those costs that do not fit precisely into other cost centers and are shared by many departments.

### **DESCRIPTION OF SERVICES**

Expenses are included for copiers, postage, telephone, the Town Report, Town Meeting, and the July 4<sup>th</sup> parade. All spending from this budget requires the approval of the Town Manager.

### **FY08 GOALS AND INITIATIVES**

- Continue efforts to implement electronic filing and records maintenance and reduce the number of photocopies that are made when sharing files and information
- Continue ongoing program of producing an all electronic file for printing the Town Report and the Annual Town Meeting Warrant
- Support work of the Technology Department in implementing new VOIP phone system in Town buildings
- Explore ways to produce paperless agenda packets for Selectmen's meetings

### **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continued to keep postage budget level funded due to use of technology for delivery of information
- Continued with quality and content of Town Report & Town Warrant
- 

### **BUDGET ISSUES**

- Postage: Anticipating a small decrease due to new WOW (weigh on the way) technology
- Memorial Day: The committee has requested a slight increase

We hope that these amounts will be sufficient for copiers, postage, telephone and equipment. For Town Report, the Town Report Committee will have to make choices on assembling and printing the Report. Many factors affect cost – the length of the report, the quality of the stock, etc. The Committee will have to manage within their budgeted amounts. The costs of putting on Town Meetings are budgeted on the Town side of operations, yet we have little control over the number of meetings and their length.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TOWN-WIDE OPERATING EXPENSES</b>						
Copiers: Supplies & Service	8,000	8,000	8,000	8,000	8,000	8,000
Postage	42,000	42,000	39,000	39,000	38,000	39,000
Telephone	20,000	20,000	20,000	20,000	20,000	20,000
Print Town Mgr Report	9,500	9,500	9,500	9,500	9,500	9,500
Town Mgr Meetings and Elections	18,000	18,000	18,000	18,000	18,000	18,000
Memorial Day	2,045	2,045	2,200	2,200	2,200	2,200
July 4th Celebration	4,000	4,000	4,000	4,000	4,000	4,000
Equipment	9,800	-	-	-	-	-
<b>Total: Operating Expenses</b>	<b>113,345</b>	<b>103,545</b>	<b>100,700</b>	<b>100,700</b>	<b>99,700</b>	<b>100,700</b>

## **UNCLASSIFIED: Transfer Accounts**

### **MISSION OF THE PROGRAM**

Annual Town Meeting is the appropriating body for the Town budget, and yet unless a special need arises; it meets only in April of each year. The School Departments have the ability to move funds around within their appropriation. The two transfer accounts provided for here provide the Town side of government with reserves to rely on should the need arise during the year.

### **DESCRIPTION OF SERVICES**

This budget has two components for unknown costs facing the Town Departments: the reserve fund and a salary contingency fund for any salary negotiations that are in progress during the year, as well as for adjustments that may be needed during the year.

### **BUDGET ISSUES: Reserve Fund**

Same level as budgeted for in FY07. As always, there are calculated risks the Town runs in making various budget decisions, and it is in this Reserve Fund we set aside funding to cover ourselves for all of those risks, such as:

1. **Legal expenses:** Funding for the law budget is set at a minimum level, but it is likely the Town will either be sued or will initiate legal proceedings to protect its rights and to defend the decisions of its Boards and Commissions.
2. **Equipment failure:** the Town relies on aging equipment. Items such as boilers in buildings, and some trucks and heavy equipment are currently beyond their useful life, but we have not been able to budget to replace them. If a failure occurs during the fiscal year we look to this fund for replacement.
3. **Snow and Ice Removal costs:** It is impossible to budget accurately for the costs of snow and ice removal. Per state law, we budget the minimum and if that amount is exceeded, we look to the reserve fund to cover any overages.
4. **Veterans' benefits:** The Town is required to pay for such benefits, but at budget preparation time we do not have any sense of how many veterans might need assistance. Thus, we keep funds against that possibility in the Reserve Fund.
5. **Fire and Police department staff injuries.** In these two critical departments, lengthy health related absences create the demand for shifts to be filled through overtime. We do not budget for this possibility in these departments, but instead assume that all employees will be healthy and able to work all scheduled shifts. But too often a long-term injury or illness does occur, and reserve fund transfers are needed to cover these overtime costs.
6. **The unexpected:** With every department's budget so tight, there is nowhere else to look for any unexpected costs that must be paid.

The reserve fund amount is slightly over 1% of the total Town budget; and that is about half what most towns of Sudbury's size keep in a Reserve Fund. As Finance Committee approval is needed to spend the money in this fund, Town Meeting can be sure this is a critical part of providing for the continued safe operation of Town departments.

### **BUDGET ISSUES: Salary Contingency Fund**

Same level as budgeted for in FY07. All Town bargaining groups have yet to settle contracts for FY08: Police, Fire, Highway, Engineering and the supervisory association. This account is also needed for unexpected personnel changes that can happen during

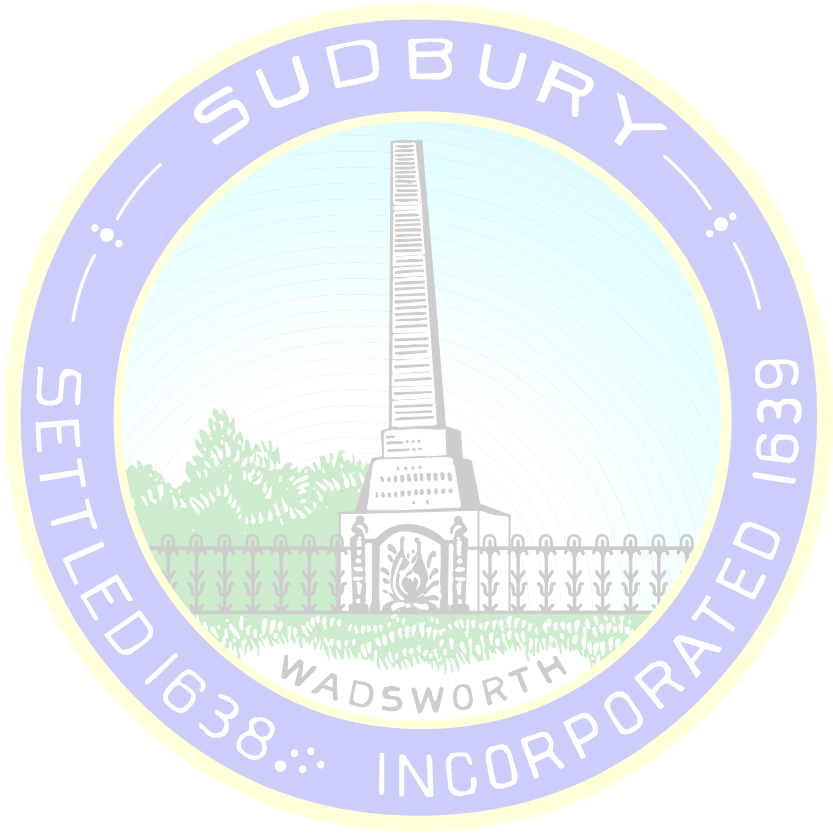
the fiscal year. Often a salary adjustment is needed if a job description changes and the reclassification puts the position at a higher pay grid, or an employee at a low step is replaced by one at a higher step. Finally, this account is used when a department has miscalculated the amounts due to an employee. While this doesn't happen often, there have been times a benefit was overlooked for an employee, such as a newly earned longevity payment or a sick leave buy back amount. This account allows for those small variations.

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town Mgr 3% Budget FY08</b>	<b>Town Mgr Request FY08</b>
<b>TRANSFER ACCOUNTS</b>						
Reserve Fund	135,000	145,000	145,000	145,000	145,000	145,000
Town Non-Clerical Contingency	65,000	173,274	206,574	206,574	206,574	206,574
<b>Total: Transfer Accounts</b>	<b>200,000</b>	<b>318,274</b>	<b>351,574</b>	<b>351,574</b>	<b>351,574</b>	<b>351,574</b>



# Section Five

## SHARED PROGRAMS & COSTS





# SHARED PROGRAMS & COSTS



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>SHARED PROGRAMS &amp; COSTS</b>						
Town Benefits & Insurance	3,124,307	3,557,700	4,011,678	4,011,678	4,011,678	4,011,678
Stabilization Fund	-	-	-	-	-	-
Debt Service	5,601,022	5,502,208	4,481,929	4,481,929	4,481,929	4,481,929
Cherry Sheet Charges & Offsets	551,234	550,200	227,420	227,420	227,420	227,420
Snow/Ice Deficits	100,000	100,000	100,000	100,000	100,000	100,000
Abatements/Exemptions	530,074	450,000	450,000	450,000	450,000	450,000
<b>Total Shared Programs &amp; Costs</b>	<b>9,906,637</b>	<b>10,160,108</b>	<b>9,271,027</b>	<b>9,271,027</b>	<b>9,271,027</b>	<b>9,271,027</b>

## **BENEFITS AND INSURANCE**

### **MISSION OF THE PROGRAM**

To provide to the employees of the Town of Sudbury (including those who work for the Sudbury Public Schools) both the required and contractually agreed upon benefits to protect their health, provide for their income security if they are injured on the job, and provide for their eventual separation from the Town, either through retirement or leaving before a retirement is reached.

### **DESCRIPTION OF SERVICES**

Employee benefits represents the cost of providing health and life insurance for Town and Sudbury Public School employees as well as for Worker's Compensation, unemployment, Medicare Tax, and the Town's assessment from the Middlesex County Retirement Board.

### **BUDGET ISSUES**

The Town Manager's Recommended Budget represents an estimate for benefits costs for the three town positions and one school position over the prior year approved FTE levels.

Small increases have been projected in the costs of Worker's Compensation and Medicare Tax accounts while Unemployment Compensation and Life Insurance have been level funded. Medicare Tax is mandated by the federal government. Previous increases in this tax liability were reflective of a rise in total Town payroll subject to the tax as more senior employees whose wages were not subject to the tax were replaced by newly hired employees whose wages were subject to this tax liability.

Medical Claims/Insurance has been increased overall 12%. Although the health insurance market remains volatile, enrollments are projected to remain stable and our claims experience since last year has reflected a slightly lower trend overall. These factors are the primary determinants of the rates for our modified self-funded health insurance programs.

Retirement Program is projected to increase by 13.4% over FY07. This increase is attributable to an increase in our assessment from the Middlesex County Retirement System calculated by their actuarial consultant to cover pension costs for all Town and SPS retirees.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town 3% Budget FY08	Town Request FY08
<b>BENEFITS &amp; INSURANCE</b>						
Worker's Compensation	22,100	24,310	27,220	27,220	27,220	27,220
Unemployment Compensation	39,000	39,000	39,000	39,000	39,000	39,000
Medicare Tax	318,450	325,500	368,500	368,500	368,500	368,500
Life Insurance	5,600	5,600	5,600	5,600	5,600	5,600
Medical Claims/ Insurance	5,785,000	6,479,200	7,256,704	7,256,704	7,256,704	7,256,704
Retirement Program	1,858,021	2,120,937	2,405,119	2,405,119	2,405,119	2,405,119
Property/Liab. Insurance	164,736	182,925	199,390	199,390	199,390	199,390
New Hires Estimate	38,857	32,000	64,000	64,000	64,000	64,000
<b>Total: Employee Benefits</b>	<b>8,231,764</b>	<b>9,209,472</b>	<b>10,365,533</b>	<b>10,365,533</b>	<b>10,365,533</b>	<b>10,365,533</b>

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town 3% Budget FY08</b>	<b>Town Request FY08</b>
<b>EMPLOYEE BENEFITS</b>						
Worker's Compensation	<b>22,100</b>	<b>24,310</b>	<b>27,220</b>	<b>27,220</b>	<b>27,220</b>	<b>27,220</b>
Town:	11,050	12,155	13,610	13,610	13,610	13,610
School:	11,050	12,155	13,610	13,610	13,610	13,610
Unemploy. Compensation	<b>39,000</b>	<b>39,000</b>	<b>39,000</b>	<b>39,000</b>	<b>39,000</b>	<b>39,000</b>
Town:	7,800	7,800	7,800	7,800	7,800	7,800
School:	31,200	31,200	31,200	31,200	31,200	31,200
Medicare Tax	<b>318,450</b>	<b>325,500</b>	<b>368,500</b>	<b>368,500</b>	<b>368,500</b>	<b>368,500</b>
Town:	82,797	84,630	95,810	95,810	95,810	95,810
School:	235,653	240,870	272,690	272,690	272,690	272,690
Life Insurance	<b>5,600</b>	<b>5,600</b>	<b>5,600</b>	<b>5,600</b>	<b>5,600</b>	<b>5,600</b>
Town:	1,848	1,848	1,848	1,848	1,848	1,848
School:	3,752	3,752	3,752	3,752	3,752	3,752
Medical Claims/ Insurance	<b>5,785,000</b>	<b>6,479,200</b>	<b>7,256,704</b>	<b>7,256,704</b>	<b>7,256,704</b>	<b>7,256,704</b>
Town:	1,793,350	2,008,552	2,249,578	2,249,578	2,249,578	2,249,578
School:	3,991,650	4,470,648	5,007,126	5,007,126	5,007,126	5,007,126
Retirement Program	<b>1,858,021</b>	<b>2,120,937</b>	<b>2,405,119</b>	<b>2,405,119</b>	<b>2,405,119</b>	<b>2,405,119</b>
Town:	1,151,911	1,345,545	1,539,276	1,539,276	1,539,276	1,539,276
School:	706,110	775,392	865,843	865,843	865,843	865,843
Property/Liab. Insurance	<b>164,736</b>	<b>182,925</b>	<b>199,390</b>	<b>199,390</b>	<b>199,390</b>	<b>199,390</b>
Town:	65,894	73,170	79,756	79,756	79,756	79,756
School:	98,842	109,755	119,634	119,634	119,634	119,634
New Hires	<b>38,857</b>	<b>32,000</b>	<b>64,000</b>	<b>64,000</b>	<b>64,000</b>	<b>64,000</b>
Town:	9,657	24,000	24,000	24,000	24,000	24,000
School:	29,200	8,000	40,000	40,000	40,000	40,000
<b>Total: Employee Benefits</b>	<b>8,231,764</b>	<b>9,209,472</b>	<b>10,365,533</b>	<b>10,365,533</b>	<b>10,365,533</b>	<b>10,365,533</b>
Town:	3,124,307	3,557,700	4,011,678	4,011,678	4,011,678	4,011,678
School:	5,107,457	5,651,772	6,353,855	6,353,855	6,353,855	6,353,855

## **STABILIZATION FUND**

### **DESCRIPTION OF SERVICES**

This is a fund maintained by the Town for several purposes. First, it is the Town's primary reserves for emergencies that occur after the year's annual budget has been approved by Town Meeting. There are really only two state approved mechanisms for building reserves for a source of funds if some large disaster hit the Town. One is free cash, and the other is the stabilization fund. Since Sudbury tends to use nearly all its free cash each year, this is the fund relied on by the Town for one-time, unexpected occurrences that need immediate financial resources.

The following is the balance in the account at the end of the most recent fiscal years:

<u>Fiscal Year</u>	<u>Amount</u>
2006	1,597,991
2005	1,555,861
2004	1,515,169
2003	1,499,886
2002	1,503,883
2001	1,201,279
2000	897,346

### **BUDGET ISSUES**

No funds are requested to be added to or used from the Stabilization Fund for FY08.

<b>CHERRY SHEET: Charges &amp; Underestimates and Offsets</b>
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**DESCRIPTION OF SERVICES**

**Cherry Sheet Charges & Underestimates** - Certain charges are levied on the Town by state law and are not subject to Town Meeting appropriation. The principal item is the MBTA assessment (Ch. 161A). Other charges are for the Air Pollution District (Ch. 111), the Metropolitan Area Planning Council (Ch. 40B), RMV Non-Renewal Surcharge (Ch. 90; Ch. 60A), Special Education (Ch. 71B), and School Choice Sending Tuition (Ch. 76).

**Cherry Sheet Offsets** - These are amounts that are included on the budget summary to now reflect only two state revenue programs that are to be spent without being part of the appropriated budget. These small grants programs are for public libraries and school lunches. We show these as "offsets" in this unappropriated category because the revenue for them is included in the total cherry sheet revenues, and must be used for direct expenditures to support the grant program.

**BUDGET ISSUES**

**Cherry Sheet Charges & Underestimates** - Cherry Sheet charges have been decreasing over the past four years, due to a change in the calculation of the MBTA assessment. Since Sudbury does not receive any direct benefit from the T, such as having a train station or bus service in Sudbury, our charges have reduced while the assessment for Towns and Cities which do receive services has increased. For FY08, the budget assumption is that charges will be \$192,974 which represents a slight decrease from the previous year.

**Cherry Sheet Offsets** - The amount shown is not subject to Town Meeting appropriation or ratification. It is, however, a part of the Town's overall budget plan. For FY08, the total amount of Offsets is estimated to be only \$34,446. The reason for this drastic decrease from prior years is due to the removal of the METCO grant program from the State's Cherry Sheet reimbursement system. While the large grant program still exists, the State has chosen to reclassify it elsewhere starting in FY07. The removal of the METCO grant from offsets has also been reflected accordingly in the Town's FY08 revenue projections.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>CHERRY SHEET CHARGES</b>						
Cherry Sheet Chgs & Underest.	195,577	194,793	192,974	192,974	192,974	192,974
Cherry Sheet Offsets	355,657	355,407	34,446	34,446	34,446	34,446
<b>Total Cherry Sheet Charges</b>	<b>551,234</b>	<b>550,200</b>	<b>227,420</b>	<b>227,420</b>	<b>227,420</b>	<b>227,420</b>



<b>SNOW AND ICE DEFICITS/OTHER DEFICITS TO BE RAISED</b>
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**DESCRIPTION OF SERVICES**

Snow removal expense is unpredictable from year to year, and subject to wide variations. The budget strategy is to recognize long-term trends without assuming a "worst-case" situation. As long as the amount appropriated is at least equal to the prior year's appropriation, the state law permits deficit spending for this purpose. The amount of any deficit is then added to the following year's levy before any new appropriations can be voted.

**BUDGET ISSUES**

The Town needs to be careful in estimating this amount, because of the levy limit restriction. By state law, if the deficit for FY07 snow and ice is larger than the amount estimated for FY08, either other budget lines must be cut to pay for the deficit, or the Town must realize enough other non-tax revenues during the year to cover any shortfall. On the other hand, if too much is estimated in this area and not needed for snow & ice, then the Town has unnecessarily tied up funds which could have been used to support other areas of the budget. \$100,000 is being recommended as a reasonable amount for planning purposes for FY08.

No other deficits are being projected and therefore, no other amount is being recommended to be set aside.

	<b>Appropriated FY06</b>	<b>Appropriated FY07</b>	<b>Level Services FY08</b>	<b>Dept Request FY08</b>	<b>Town Mgr 3% Budget FY08</b>	<b>Town Mgr Request FY08</b>
<b>DEFICITS</b>						
Recap. Snow & Ice Deficits	100,000	100,000	100,000	100,000	100,000	100,000
<b>Total Deficits</b>	<b>100,000</b>	<b>100,000</b>	<b>100,000</b>	<b>100,000</b>	<b>100,000</b>	<b>100,000</b>

## ABATEMENTS AND EXEMPTIONS

### DESCRIPTION OF PROGRAM

This is an amount, also known as "overlay", that is added to the property tax levy in excess of the sum required to meet appropriations, state assessments and deficits. It cannot exceed 5% of the levy and is used to cover abatements and exemptions granted by the Board of Assessors or as a result of appeals to the State Appellate Tax Board or to the courts. This budget item is counted in the total tax levy subject to the limitations of "Proposition 2 ½".

After all abatements and exemptions have been settled for a given year, any surplus remaining in that year's overlay account is first applied to any deficit balances from other years. Funds remaining after such transfer become part of the Town's fund balance available for appropriation by Town Meeting. This is called Abatement Surplus.

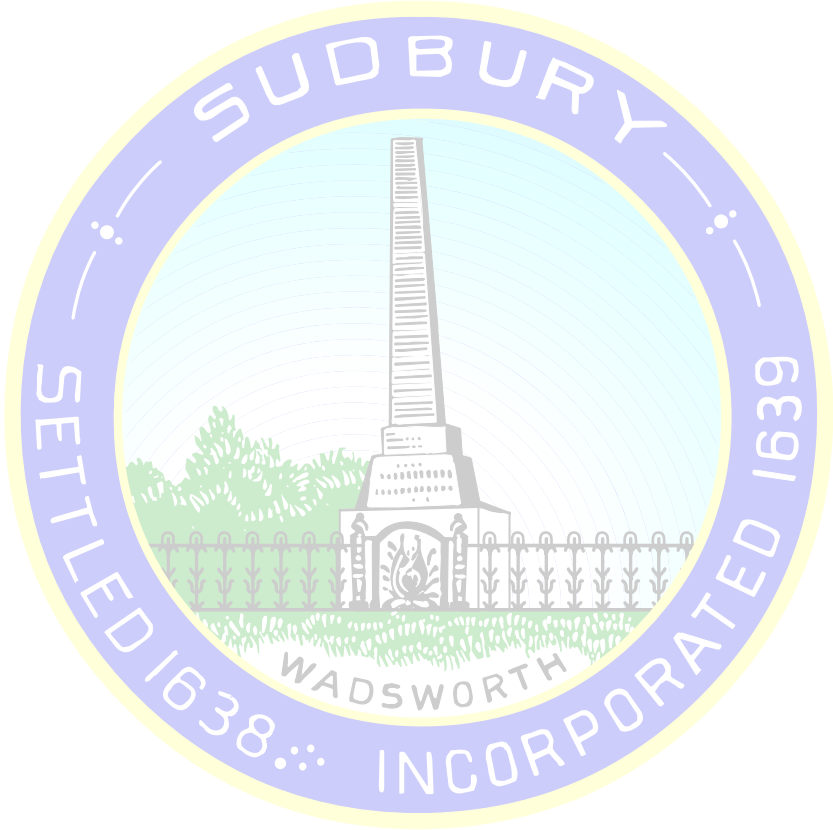
### BUDGET ISSUES

The amount in this account is not subject to Town Meeting appropriation or ratification. It is, however, a part of the Town's budget plan. For FY08, the Board of Assessors has set the amount for this account at \$450,000.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ABATEMENTS &amp; EXEMPTIONS</b>						
Abatements & Exemptions	530,074	450,000	450,000	450,000	450,000	450,000
<b>Total Abatements &amp; Exemptions</b>	<b>530,074</b>	<b>450,000</b>	<b>450,000</b>	<b>450,000</b>	<b>450,000</b>	<b>450,000</b>

# Section Six

# ENTERPRISE FUNDS



# ENTERPRISE FUNDS



	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>ENTERPRISE FUNDS</b>						
Transfer Station	399,843	267,803	271,574	271,574	271,574	271,574
Atkinson Pool	426,212	436,713	457,842	457,842	457,842	457,842
<b>Total Enterprise Funds</b>	<b>826,055</b>	<b>704,516</b>	<b>729,416</b>	<b>729,416</b>	<b>729,416</b>	<b>729,416</b>

## **ENTERPRISE FUNDS: Solid Waste/Transfer Station**

### **DESCRIPTION OF SERVICES**

The Town of Sudbury does not offer curbside solid waste pickup, but rather operates a Transfer Station/Recycling Center at the site of the former Sand Hill Sanitary Landfill located at 20 Boston Post Road. The Transfer Station is the receiving point for approximately one fourth of the town's residential waste, which is then hauled by the Town to a transfer station in Hudson. Private contractors hired by residents pick up and haul the remaining residential waste. The Transfer Station also operates an extensive recycling center for glass, plastic paper, CRT's, tires and oil. To cover the costs of operations, residents who wish to use the Transfer Station are charged an annual fee for a sticker, plus through a "pay as you throw" system residents pay for each bag of waste they bring to the facility. The bags are purchased at a number of retail locations in Sudbury. This "pay as you throw" encourages recycling and allocates the true cost of waste handling to the users with the greater volume of waste produced.

### **STAFFING**

There are two employees regularly assigned to the Transfer Station operations.

### **BUDGET ISSUES**

The solid waste disposal enterprise fund pays all its direct and indirect costs, and is not subsidized by the tax levy. This enterprise fund remains self-supporting.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>TRANSFER STATION ENTERPRISE FUND</b>						
Non-Clerical	83,979	88,217	89,491	89,491	89,491	89,491
Overtime	7,000	7,000	7,000	7,000	7,000	7,000
Clerical	7,342	7,629	7,251	7,251	7,251	7,251
<b>Sub Total: Personal Services</b>	<b>98,321</b>	<b>102,846</b>	<b>103,742</b>	<b>103,742</b>	<b>103,742</b>	<b>103,742</b>
General Expense	23,095	23,095	24,732	24,732	24,732	24,732
Maintenance	32,862	32,862	34,100	34,100	34,100	34,100
Hauling & Disposal	87,000	89,000	89,000	89,000	89,000	89,000
Hazardous Waste	-	-	-	-	-	-
Resource Recovery	18,565	20,000	20,000	20,000	20,000	20,000
<b>Sub Total: Expenses</b>	<b>161,522</b>	<b>164,957</b>	<b>167,832</b>	<b>167,832</b>	<b>167,832</b>	<b>167,832</b>
Capital Expense	140,000	-	-	-	-	-
<b>Sub Total: Capital Expenses</b>	<b>140,000</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Sub Total: Direct Costs</b>	<b>399,843</b>	<b>267,803</b>	<b>271,574</b>	<b>271,574</b>	<b>271,574</b>	<b>271,574</b>
<b>(Appropriated)</b>	-	-	211	211		
INDIRECT COSTS: (Not Appropriated)						
Benefits/Insurance	18,793	24,000	30,912	30,912	30,912	30,912
<b>Sub Total: Indirect Costs</b>	<b>18,793</b>	<b>24,000</b>	<b>30,912</b>	<b>30,912</b>	<b>30,912</b>	<b>30,912</b>
<b>Total: Solid Waste</b>	<b>418,636</b>	<b>291,803</b>	<b>302,486</b>	<b>302,486</b>	<b>302,486</b>	<b>302,486</b>
SOLID WASTE RECEIPTS	278,636	291,803	302,486	302,486	302,486	302,486
RETAIN. EARNINGS USED	140,000	-				
Total Revenue	418,636	291,803	302,486	302,486	302,486	302,486
Surplus/Deficit	-	-	(0)	(0)	(0)	(0)

## **MISSION OF THE OFFICE**

The Mission of The Sudbury Atkinson Pool is to provide aquatic activities, leisure services to the public. To enhance the quality of life for the Town of Sudbury residents by providing clean, safe and attractive aquatic facility that promote a strong sense of community.

## **DESCRIPTION OF SERVICES**

The Atkinson Pool is a Town owned year round indoor aquatic facility, which opened in January 1988. There is an eight-lane 25-yard pool and a separate dive well with two one-meter boards. The pool offers a variety of aquatic programs and events throughout the year. Programs include swim lessons (ages 3 through adult), parent and child classes, spring board diving lessons, aquatic exercise, deep water workout, masters swimming, family swimming, lap swimming, adult and youth SCUBA lessons, first aid and CPR, Lifeguard Training and Water Safety Instructor classes. The pool also hosts a number of swim teams, including the Sudbury Youth Swim Team, The Lincoln Sudbury Regional High School Swim Team, and several area high schools swimming and diving teams.

## **STAFFING**

The department consists of a full-time aquatic director two full-time aquatic supervisor's, a head lifeguard and many aquatic staff, mostly part-time, who are paid out of enterprise fund.

## **FY08 GOALS AND INITIATIVES**

- Update the Maintenance Plan for the Atkinson pool for next 5 years
- Completion of the capital project for FY07-FY08
- Continue efforts to bring financial stability and predictability to the Atkinson Pool

## **FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- Continue efforts to bring financial stability and predictability to the Atkinson Pool
- Installed Dive well heater & pump
- Installed lap pool pump
- New Scoreboard
- Locker room Maintenance
  - New tiles
  - Painting
  - New showers
  - lighting

**PERFORMANCE/WORKLOAD INDICATORS**

<b>Indicator</b>	<b>FY05</b>	<b>FY06</b>
<b>Atkinson Pool Memberships</b>	<b>1,073</b>	<b>1,045</b>
<b>Atkinson Pool Members</b>	<b>2,075</b>	<b>2,038</b>
<b>Pool Attendance</b>	<b>78,079</b>	<b>83,789</b>

**BUDGET ISSUES**

Atkinson Pool operates as an Enterprise Fund under Massachusetts General Law Chapter 44 Section 53F ½. The proposed FY'08 budget for Atkinson Pool does address the need to adequately staff the pool and provide a safe and enjoyable experience for the increase in the number of facility users. A review of the current staffing and hours of operation as well as the increase in utility rates has resulted in the department request budget for FY'08. As an Enterprise Fund, there is a present demand to seek revenue sources and minimize cost to break even. Over the past several years, we have implemented many new ways to increase revenues, including increasing programming opportunities, cooperative program offerings with area Park and Recreation Departments, restructuring birthday party rentals, and increasing rental opportunities for swim teams.

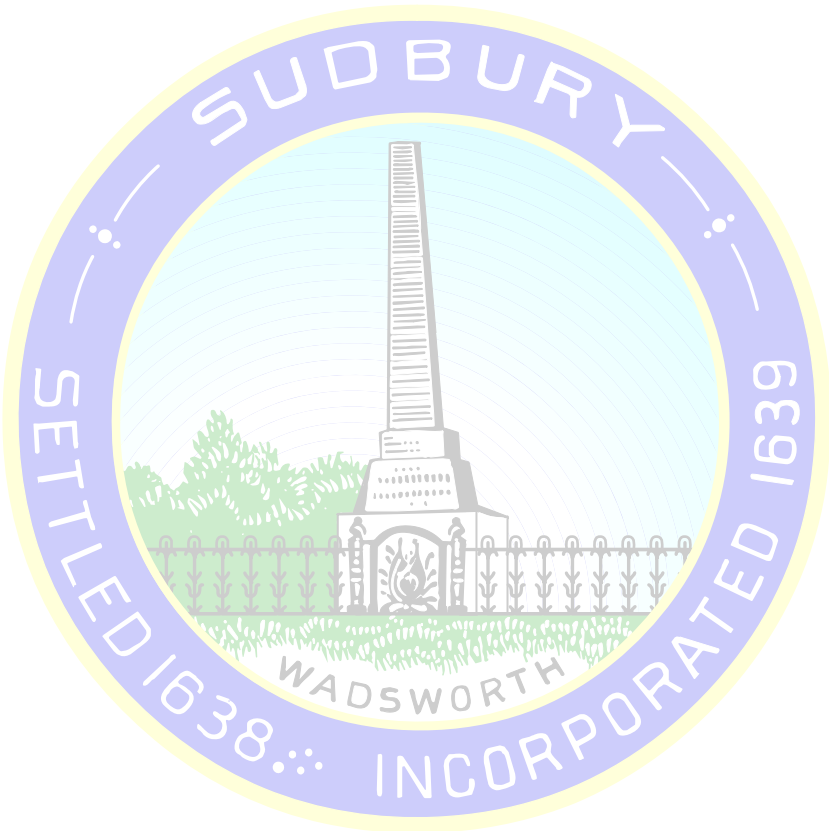


	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>POOL ENTERPRISE FUND</b>						
Non-Clerical	124,150	126,979	136,262	136,262	136,262	136,262
Head Lifeguards	32,057	32,338	33,803	33,803	33,803	33,803
Overtime	1,100	1,100	1,133	1,133	1,133	1,133
Clerical	15,012	15,822	16,947	16,947	16,947	16,947
Part Time Supervisors	7,856	7,856	8,092	8,092	8,092	8,092
Receptionists	17,430	23,636	24,345	24,345	24,345	24,345
WSI Lifeguards	68,732	63,732	65,644	65,644	65,644	65,644
Instructors	11,875	12,250	12,618	12,618	12,618	12,618
<b>Sub Total: Personal Services</b>	<b>278,212</b>	<b>283,713</b>	<b>298,842</b>	<b>298,842</b>	<b>298,842</b>	<b>298,842</b>
General Expense	10,000	10,000	10,000	10,000	10,000	10,000
Utilities	84,000	89,000	92,000	92,000	92,000	92,000
Maintenance	45,000	45,000	45,000	45,000	45,000	45,000
Programs	3,000	3,000	6,000	6,000	6,000	6,000
Equipment	6,000	6,000	6,000	6,000	6,000	6,000
<b>Sub Total: Expenses</b>	<b>148,000</b>	<b>153,000</b>	<b>159,000</b>	<b>159,000</b>	<b>159,000</b>	<b>159,000</b>
Building improvements	0	0	0	0	0	0
<b>Sub Total: Capital Expenses</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>Total: Pool Enterprise Direct Costs</b>	<b>426,212</b>	<b>436,713</b>	<b>457,842</b>	<b>457,842</b>	<b>457,842</b>	<b>457,842</b>
(Appropriated)	0	0	8,704	8,704		
INDIRECT COSTS: (Not Appropriated)						
Insurance & Benefits	58,434	48,615	62,198	62,198	62,198	62,198
<b>Sub Total: Indirect Costs</b>	<b>58,434</b>	<b>48,615</b>	<b>62,198</b>	<b>62,198</b>	<b>62,198</b>	<b>62,198</b>
<b>Total: Pool Enterprise</b>	<b>484,646</b>	<b>485,328</b>	<b>520,040</b>	<b>520,040</b>	<b>520,040</b>	<b>520,040</b>
POOL ENTER. RECEIPTS	426,212	430,000	440,000	440,000	440,000	440,000
Tax Levy	58,434	48,615	62,198	62,198	62,198	62,198
RETAIN. EARNINGS USED	0	6,713	17,842	17,842	17,842	17,842
Surplus (Deficit)	0	0	0	0	0	0



# Section Eight

# CAPITAL INVESTMENT BUDGET



## **CAPITAL INVESTMENT: DEBT SERVICE**

### **MISSION OF THE PROGRAM**

Debt financing is the primary means of financing large capital projects in Sudbury. The use of debt allows the Town to afford the construction of large scale capital assets in a systematic and planned manner.

The mission of the Town as regards to debt management has five components:

1. To achieve the best possible true interest cost associated with the debt.
2. To maintain an amount of debt to be issued and retired each year that results in the impact on the tax rate that is fairly consistent year to year.
3. To maintain the AAA credit rating that was first issued to the Town in 2000 by Standard & Poor's of New York.
4. To keep the average weighted maturities of outstanding debt as low as possible, so as to hold down the amount of debt service that is allocated to interest costs, and to allow for the issuance of new debt as newly recognized capital needs emerge.
5. To integrate any borrowing authorized under the Community Preservation Act into the overall debt financing plans of the Town.

Please see the Board of Selectmen's Debt Policy and Capital Budgeting and Planning Policy.

### **DESCRIPTION OF SERVICES**

This budget provides for the repayment of principal and interest on the Town's long-term general fund debt. (Debt service funded through the Community Preservation Act (CPA) is not considered part of the Town's annual budget, but is shown within the Community Preservation Committee submitted articles at Town Meeting). The Town does not issue any enterprise debt. All of Sudbury's non-CPA debt is exempt from the limits of Proposition 2 ½.

The Town issues debt pursuant to votes of Town Meeting to provide funding for major projects, in accordance with Massachusetts General Laws, Chapter 44, section 7 and 8. The maximum amount of debt for each project is authorized by Town Meeting, and then the Town Treasurer issues the bond after working with the Town Manager and the Town's Financial Advisor to design and structure the bond, and with the approval of the Board of Selectmen.

The General Debt Limit of a city or town consists of a Normal Debt Limit and a Double Debt Limit. The Normal Debt Limit is 5 percent of the valuation of taxable property as last equalized by the State Department of Revenue. The Town of Sudbury's EQV for 2006 was \$4,260,907,900. The normal debt limit (of 5% EQV) is therefore, \$213,045,395. As of June 30, 2006 the Town's permanent debt outstanding was \$46,305,000 or only 22% of the allowable normal debt limit.

A city or town can authorize debt up to this amount without State approval. It can authorize debt up to twice this amount (the Double Debt Limit) with the approval of the state Municipal Finance Oversight Board composed of the State Treasurer, the State Auditor, the Attorney General and the Director of Accounts.

There are many categories of general obligation debt which are exempt from and do not count against the General Debt Limit. Among others, these exempt categories include revenue anticipation notes and grant anticipation notes, emergency loans, loans exempted by special laws, certain school bonds, sewer bonds, and solid waste disposal facility bonds and economic development bonds supported by tax increment financing. As of June 30, 2006 the Town had \$28,258,000 in long-term debt outside the debt limit; all of which pertains to various school building projects for K-8.

The Town Treasurer has spent a great deal of time in debt issuance and management over the past six years, as the Town has approved a number of bond authorizations for school construction, land acquisition, and various other projects. Additionally, the Treasurer's Office has taken advantage of lower interest rates to refinance outstanding bonds at lower interest costs.

The Town also pays a prorated share of the debt service for bonds issued in connection with the Lincoln-Sudbury Regional School High School. The Regional School District issues and manages its own debt. Sudbury taxpayers will be expected to pay approximately 85% of that new debt, after grant reimbursements.

	Appropriated FY06	Appropriated FY07	Level Services FY08	Dept Request FY08	Town Mgr 3% Budget FY08	Town Mgr Request FY08
<b>DEBT SERVICE</b>						
Temp. Loan Int.	-	-	-	-	-	-
Long Term Bond Int.	1,859,344	1,741,465	1,402,354	1,402,354	1,402,354	1,402,354
Long Term Bond Principal	3,730,000	3,750,000	3,070,000	3,070,000	3,070,000	3,070,000
Interest Refund	-	-	-	-	-	-
Bond & Note Expense	11,678	10,743	9,576	9,576	9,576	9,576
<b>Total: Debt Service</b>	<b>5,601,022</b>	<b>5,502,208</b>	<b>4,481,929</b>	<b>4,481,929</b>	<b>4,481,929</b>	<b>4,481,929</b>
<b>NON-EXEMPT DEBT SERVICE</b>						
Premium on Bonds	11,678	10,743	9,576	9,576	9,576	9,576
Interest Refund (Abatements)	-	-	-	-	-	-
Note Expense	-	-	-	-	-	-
<b>Sub-Total: Non-Exempt Debt</b>	<b>11,678</b>	<b>10,743</b>	<b>9,576</b>	<b>9,576</b>	<b>9,576</b>	<b>9,576</b>
<b>EXEMPT DEBT SERVICE</b>						
Temp. Loan Int.	-	-	-	-	-	-
Long Term Bond Int.	1,859,344	1,741,465	1,402,354	1,402,354	1,402,354	1,402,354
Long Term Bond Principal	3,730,000	3,750,000	3,070,000	3,070,000	3,070,000	3,070,000
Bond & Note Expense	-	-	-	-	-	-
<b>Sub-Total: Exempt Debt</b>	<b>5,589,344</b>	<b>5,491,465</b>	<b>4,472,354</b>	<b>4,472,354</b>	<b>4,472,354</b>	<b>4,472,354</b>

<b>Issuance Date</b>	<b>Project</b>	<b>Actual FY06</b>	<b>Projected FY07</b>	<b>Budget FY08</b>
7/15/1997	Meachen Land, revoted	49,993	47,535	-
7/15/1997	Library	263,600	250,655	-
7/15/1997	Nixon Addition	183,649	175,917	-
7/15/1997	K-8 Renovations	217,749	205,773	-
7/15/1997	School Tennis Courts	364	345	-
6/1/1999	Weisblatt Land	301,578	290,413	279,248
6/1/1999	Meachen Land	205,798	197,713	189,628
12/1/2000	Curtis Middle School	1,224,879	1,179,535	1,118,640
12/1/2000	Haynes Elementary	434,346	418,415	393,036
10/1/2001	Loring Elementary	915,018	881,280	864,680
10/1/2001	Haskell Field	30,138	29,200	23,200
10/1/2001	Traffic Signal (Rt. 117)	18,443	17,880	17,280
10/1/2001	Walkways	77,813	-	-
10/1/2001	Featherland	24,750	24,000	23,200
10/1/2001	Feeley Field Restrooms	12,450	-	-
10/1/2001	Refunding 1992 Issue Unisys/Melone	143,838	134,725	130,556
4/1/2003	DPW	531,250	522,750	512,125
4/1/2003	K-8 Schools Remainder	125,000	123,000	120,500
2/15/2005	Curtis Refunding 2000 Issue	377,016	377,016	377,016
2/15/2005	Hayne Refunding 2000 Issue	132,465	132,465	132,465
6/15/2005	Weisblatt Land Refunding 1999 Issue	66,473	88,631	88,631
6/15/2005	Meachen Land Refunding 1999 Issue	48,136	64,181	64,181
6/15/2005	Capital Equipment/Renov.	156,244	148,169	137,969
<b>Total direct exempt debt (gross)</b>		<b>5,540,987</b>	<b>5,309,598</b>	<b>4,472,354</b>
		0	0	0
<b>Exempt Debt by Category (gross)</b>				
Schools K-8		3,610,486	3,493,747	3,006,336
Town		1,114,686	992,653	713,774
Land Acquisition		815,815	823,198	752,244
L-S assessment, Sudbury share		2,461,086	2,935,689	2,647,937
		<b>8,002,072</b>	<b>8,245,286</b>	<b>7,120,291</b>
<b>Adjustments to debt</b>				
School Building Assitance Reimbursement		(2,816,206)	(2,816,206)	(2,816,206)
Net premiums received on Debt Issues		(11,678)	(10,743)	(9,576)
		<b>(2,827,884)</b>	<b>(2,826,949)</b>	<b>(2,825,782)</b>
<b>Total exempt Debt (net)</b>		<b>5,174,188</b>	<b>5,418,337</b>	<b>4,294,509</b>

## CAPITAL INVESTMENT: ANNUAL CAPITAL BUDGET AND FIVE YEAR PLAN

### MISSION OF THE PROGRAM

For the Town of Sudbury to accomplish its mission of *Protecting Public Safety, Public Assets and a Special Quality of Life*, the Town and School departments need to have funds for acquiring, maintaining and replacing large items such as infrastructure, buildings, equipment and technology. The Annual Capital Budget is designed to be sure there is an orderly process for evaluating the Town's assets and their expected useful lives, projecting replacement costs, and assigning priorities among such projects when resources cannot fund all requested projects. Further, the Five Year Capital Plan is designed to insure that the Town develops annual operating and capital plans in awareness of and the long range needs and plans of the Town.

### DESCRIPTION OF SERVICES

The Annual Capital Budget and the Five Year Capital Plan are developed by the Town's Capital Improvement Planning Committee. A capital bylaw was adopted in 1998, created a capital improvement planning committee, defined what items are to be considered capital, and set forth the capital improvement planning process. In 2005, the Board of Selectmen approved a capital budgeting and planning policy that is meant to complement the capital bylaw. The Selectmen's entire budgeting and financial management policy statement is found in Section One of this budget document. The capital budgeting section is repeated below.

#### Capital Budgeting and Planning Policy

Capital assets include land, improvements to land, buildings, building improvements, vehicles, machinery, equipment, works of art and historical treasures, infrastructure, construction in progress and all other tangible and intangible assets that are used in operations and have initial useful lives extending beyond a single reporting period. Infrastructure assets are long-lived capital assets that normally are stationary in nature and can be preserved for a significantly greater number of years than most capital assets. Examples of infrastructure assets owned by the Town of Sudbury include roads, bridges, tunnels, dams and drainage systems. The Town of Sudbury has a capital planning and budget bylaw and process that require the following:

- On or before November 15 of each year, the Town Manager will submit a capital program to the Capital Improvement Planning Committee. The proposed program will detail each capital project, the estimated cost, description and funding source.
- The Town will update and readopt annually a five-year capital improvement plan ("CIP"), including the upcoming annual capital improvement budget ("CIB") and a four year projection of capital needs and expenditures which details the estimated cost, description and anticipated funding sources for capital projects.
- The first year of the five year CIP will be the basis of formal fiscal year appropriation request during the annual budget process.
- Per the Town's capital bylaw, the Capital Improvement Budget and Plan will generally address capital purchases/projects/improvement with a value of more than \$10,000 and a useful life of over five (5) years.

- The Town will emphasize preventive maintenance as a cost-effective approach to infrastructure maintenance. Exhausted capital goods will be replaced as necessary.
- The capital improvements plan should be tied to the Town's master facilities study to ensure that the capital items requested meet the future growth needs for the Town.

**STAFFING**

The Town’s Finance Director is an ex-officio member of the Capital Improvement Planning Committee and provides technical advice and support to the committee.

**FY08 GOALS AND INITIATIVES**

- Evaluated all operating capital requests and prioritized them to remain within the current funds available for FY08, estimated at \$384,148
- Also recommended capital exclusion funding for new Fire Truck, estimated at \$405,000
- Determined if any capital requests have an alternative revenue source besides the operating budget
- Developed an overall FY08 Capital Plan showing all projects with associated funding sources identified
- Developing an appropriation article for presentation to the FY08 Annual Town Meeting

**FY07 MAJOR INITIATIVES AND ACCOMPLISHMENTS**

- The operating capital budget for FY07 for \$285,095 was adopted by Town Meeting
- Adopted Budget and Financial Management Policies for the Town

**BUDGET ISSUES**

All but one project recommended for funding for FY08 fall into the category of **Operating Capital** and are recommended to be funded through the portion of the Operating Budget that is set aside for such projects. These funds requested, \$384,148 equal approximately 2.5% of the operating budget for the Town Departments. The largest project for \$405,000 for a new Fire Engine is recommended to be funded as a Capital Exclusion for FY08.

	<b>CIPC Recommend FY08</b>	<b>Town Mgr Request FY08</b>
<b>Capital Improvement Planning Report</b>		
Buildings-various repairs & imprv	70,000	70,000
Fire-small equipment truck	45,000	45,000
Highway-fleet replacement	123,100	123,100
Parks & Grounds-mower	23,000	23,000
Pool-starting platforms	14,500	14,500
MIS-wide-format printer	14,550	14,550
Town Center Traffic Improvements	70,000	70,000
General-scanner & T/C lease yr. 2	23,998	23,998
<b>Total: Operating Expenses</b>	<b>384,148</b>	<b>384,148</b>



1. Town Building Improvements. Most of the buildings that house our town offices, such as the Flynn Building, the Town Hall and the Loring Parsonage are historic buildings ranging in age from many decades to centuries old. They are in constant need of renovations and improvements in order to halt further deterioration and to provide safe and adequate space in which taxpayers can conduct business and in which town employees work. Some of the projects for which the Building Inspector has requested funds through this capital article include but are not limited to roofing, siding, structural repairs window replacement and HVAC upgrades. The CIPC has determined that attention to these aging buildings should be considered the highest priority in order to protect the town's assets with an eye to safety and efficiency. The Committee feels it is important to make an ongoing annual commitment to completing these long-delayed projects. This article only partially funds a long list of projects that have been delayed over the years, however, it does allow the Building Inspector to complete those he and the Town Manager have determined to be of the highest priority. **Implications for Operating Budget:** No additional personnel, maintenance or utility costs will be added due to this work, but there will be modest reductions in costs from making these improvements, and the work will
  
2. Fire Department. The Fire Department has to replace vehicles on a schedule that maximizes the useful life of all of its fleet. This year the CIPC recommends funding in the amount of \$45,000 for a new heavy-duty pickup truck to be used to transport small equipment/fire apparatus to and from emergency calls. In turn, the existing equipment truck will be used as the replacement for the department's brush fire truck which has recently been declared unfit for use.
  
3. Fleet Replacement. The Department of Public Works has to replace vehicles on a schedule that maximizes the useful life of all of its fleet. Every time there is a delay in replacing aging rolling stock, there is a domino affect that can be costlier in the long run. The automobiles and small pickup trucks are often recycled to other departments in need of vehicles to conduct their business such as the building department or recreation. In the past several years the Town has been forced to acquire vehicles through lease purchases, which cost the town interest. This year, the DPW request includes 3 vehicles to be funded through a lease purchase. The CIPC recommends funding in the amount of \$77,100 for three heavy-duty vehicles that top the DPW Director's many needs. These include but are not limited to a 10-wheel dump truck, 6-wheel dump truck and pickup truck for Highway. Additionally, the CIPC recommends funding in the amount of \$46,000 for the purchase of mid-size pickup truck. The DPW and the Town Manager are in the best position to prioritize and determine throughout the year which vehicles on the very long list of older vehicles need replacement. As such funds recommended in this category may be used for other DPW vehicles, on an emergency basis. **Implications for Operating Budget:** No additional personnel, maintenance or utility costs will be added due to this work, as the trucks added will only replace existing ones that have reached the end of their useful life.

4. Parks & Grounds. The CIPC recommends funding in the amount of \$23,000 for the purchase of a new Hustler mower. This new unit will replace an older mower purchased in 1989.
  
5. Pool Safety Improvements. The Director of Recreation has advised the CIPC that there is a safety issue at the Atkinson Pool that requires the replacement of all starting platforms. These platforms are used by swim teams and other patrons on a regular basis. The CIPC recommends funding in the amount of \$14,500 for the replacement of the platforms. Replacement will maintain this valuable asset and eliminate the risk of injury to pool patrons. ***Implications for Operating Budget:*** No additional personnel, maintenance or utility costs will be added due to this work, as this is a safety related project that replaces an older asset. The platforms would be replaced during the summer when no swim team events are scheduled.
  
6. Wide-format Printer. The CIPC recommends funding in the amount of \$14,550 for the purchase of a wide-format printer. A wide-format printer can provide almost every town department with a much-needed resource for large-scale replication of several types of documents. The Technology Director and department heads have been working together to determine the needs of the Town offices and feel the best location for this printer is in the Engineering Department. This unit will replace an aging, outdated plotter with a safer, more versatile printer that can be accessed through the Town's computer network. Documents requiring wide-format replication include but are not limited to parcel maps, development & sub-division plans, inspection materials, plot plans and septic plans. ***Implications for Operating Budget:*** No additional personnel, maintenance or utility costs will be added due to this new unit. The Town anticipates that effectiveness will be enhanced by this purchase, as personnel will have access to a networked, piece of equipment that can readily handle vital document requests to spec without manual alterations, etc.
  
7. Town Center Traffic Improvements. The CIPC recommends funding in the amount of \$70,000 to survey and develop preliminary engineering designs for traffic/safety improvements at Town Center. This money along with funds requested of the CPC for FY08 is necessary to advance this project beyond the initial work done and paid for by grant; in hopes of improving the current traffic/safety conditions at the Town's Historic Center. ***Implications for Operating Budget:*** No additional personnel, maintenance or utility costs will be added due to this project.
  
8. Scanner for Archiving. The CIPC recommends funding in the amount of \$11,500 for the purchase of a multi-function scanner device. The purchase of a new scanner is necessary to implement Town-wide digital archiving of vital documents. Archiving is scheduled to begin in FY08 within the Town Clerk's, Public Safety and Public Work's departments. The scanner device will be located within the Town Clerk's Department, accessible elsewhere through the

Town's computer network. **Implications for Operating Budget:** No additional personnel, maintenance or utility costs will be added due to this project.

9. Tax Collection Software. The CIPC recommends funding in the amount of \$12,498 for the 2<sup>nd</sup> annual lease payment for new Tax Collection software; as authorized by last year's Town Meeting. **Implications for Operating Budget:** This software (to be implemented by the end of FY07) will allow the Collector and her staff to operate more efficiently and will provide better reporting of the data for the staff and to the taxpayer. There is potential expansion with this system that will provide Internet access to the Taxpayer for billing information and payment options. No additional personnel, maintenance or utility costs will be added due to this project

This capital outlay is part of the commitment made in FY07 to appropriate funds for all subsequent annual lease payments via capital budget articles rather than through the collector's operating budget.

## **FIVE YEAR CAPITAL PROGRAM**

The table on the following pages shows all capital projects that have been requested and scheduled for municipal departments over the next five years. As always, Town Meeting has the final appropriating authority for all capital projects.

Information related to Projects for renovating or constructing the Town's buildings is taken from the Townwide Comprehensive Facility Study.

1st submitted	Department	Description	Total Proj.	Remaining	FY2008	FY2009	FY2010	FY2011	FY2012
2007	Building	Various Bldg Improvements	210,000	210,000	70,000	35,000	35,000	35,000	35,000
2008	Building	Parking Lot Lights- Town Hall	10,000	10,000		10,000			
2005	Building	Town Hall Roof (Clerk's Office)	17,500	17,500		17,500			
2006	Building	Fairbank Window Replacement	30,000	30,000		30,000			
2006	Building	Flynn Bldg Alarm Upgrade	22,000	22,000		22,000			
2007	Building	Permit Software-Building Dept.	10,000	10,000		10,000			
2003	Building	Police Station Roof	18,000	18,000		18,000			
2003	Building	Town Hall Bathrooms	30,000	30,000		30,000			
2008	Building	Town Hall Handicap Entrance	10,000	10,000		10,000			
2007	Building	Town Hall Painting	24,000	24,000		24,000			
2008	Building	Town Hall-Clerk's Bathroom	18,000	18,000		18,000			
2008	Building	Keypad for Flynn Entrance	6,000	6,000			6,000		
2003	Building	Senior Center Roof/Skylights	40,000	40,000			40,000		
2005	Building	Town Hall Roof Repairs	40,000	40,000			40,000		
2005	Building	Atkinson Pool Roof & Gutters	40,000	40,000				40,000	
2008	Building	Interior Painting of DPW	18,000	18,000				18,000	
2003	Building	Town Hall Boiler Replacement	25,000	25,000				25,000	
2007	Building	Town Hall Fire Alarm Upgrade	25,000	25,000				25,000	
2007	Building	Town Hall Windows	16,000	16,000				16,000	
2006	Fire	Engine 7/M1 replacement	45,000	45,000	45,000				
2006	Fire	Fire Engine 1-87 replacement	425,000	425,000	425,000				
2008	Fire	Exterior Door Replacement	5,000	5,000		5,000			
2008	Fire	Replace Water Heater	7,000	7,000		7,000			
2008	Fire	HQ Landscape Plan	20,000	20,000		20,000			
2008	Fire	Replace HQ Alarm Room Floor	10,000	10,000		10,000			
2006	Fire	Replace HQ Bathroom floor	20,000	20,000		20,000			
2006	Fire	Station 2 bathroom replacement	20,000	20,000		20,000			
2006	Fire	Station 2 bedroom alteration	50,000	50,000		50,000			
2006	Fire	Station 3 bedroom alteration	50,000	50,000		50,000			
2003	Fire	Station 3 roof	80,000	80,000		80,000			

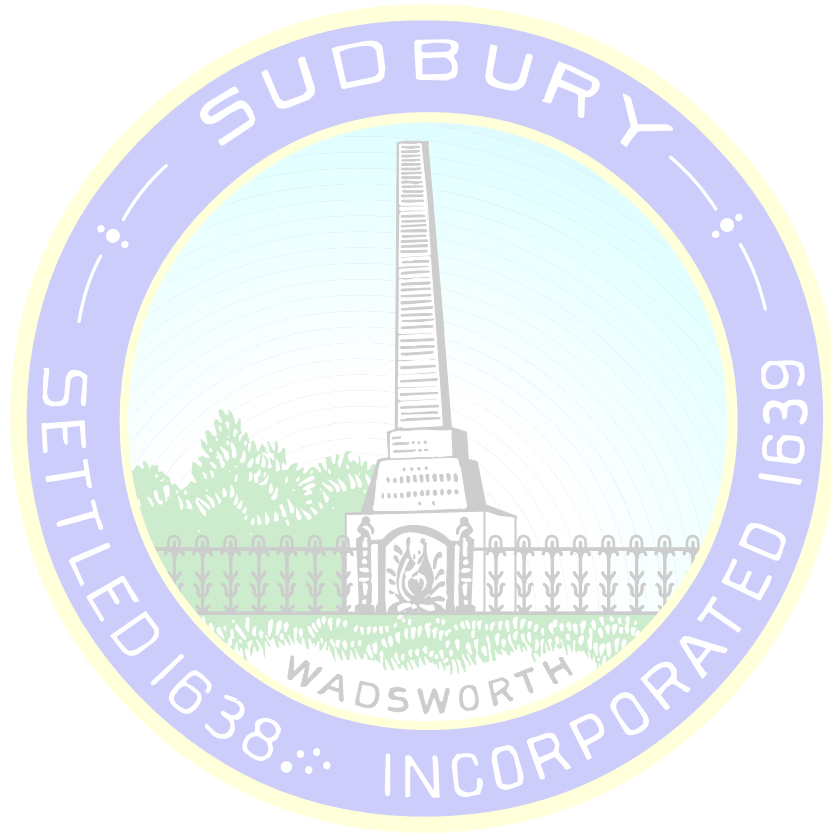
1st submitted	Department	Description	Total Proj.	Remaining	FY2008	FY2009	FY2010	FY2011	FY2012
2006	Fire	Station 2 window replacement	50,000	50,000		50,000			
2006	Fire	Station 3 window replacement	50,000	50,000		50,000			
2005	Fire	Ambulance	175,000	175,000		175,000			
2008	Fire	Fire Engine 4-89 replacement	450,000	450,000		450,000			
2008	Fire	HQ Addition	500,000	500,000			500,000		
2006	Fire	Fire Engine 3-97 replacement	450,000	450,000				450,000	
2007	Fire	Headquarters Roof	60,000	60,000					60,000
2008	Highway	1986 Mack 10 Whl Dump (Unit 5)	150,000	150,000	30,000	30,000	30,000	30,000	30,000
2008	Highway	1997 Chevy 1 Ton (Unit 23)	97,000	97,000	19,400	19,400	19,400	19,400	19,400
2007	Highway	1988 Mack 6 Whl Dump (Unit 4)	138,500	138,500	27,700	27,700	27,700	27,700	27,700
2007	Highway	1997 Melroe Bobcat (Unit 26)	50,000	50,000		50,000			
2008	Highway	1988 John Deere Backhoe (Unit 22)	110,000	88,000		22,000	22,000	22,000	22,000
2008	Highway	1998 Chevy Pick Up (Unit 30)	46,000	46,000	46,000				
2008	Highway	1988 Bombadier Tractor (Unit 33)	122,000	97,600		24,400	24,400	24,400	24,400
2008	Highway	1989 Mack 4 Wheel Drive (Unit 24)	138,500	110,800		27,700	27,700	27,700	27,700
2008	Highway	1991 GMC Top Kick (Unit 19)	100,000	80,000		20,000	20,000	20,000	20,000
2008	Highway	1991 Mack 6 Whl Dump (Unit 11)	138,500	110,800		27,700	27,700	27,700	27,700
2008	Highway	1992 Mack 6 Whl Dump (Unit 20)	138,500	110,800		27,700	27,700	27,700	27,700
2007	Highway	1992 Mack 6 Whl Dump (Unit 27)	138,500	110,800		27,700	27,700	27,700	27,700
2007	Highway	1999 Chevy Pick Up (Unit 14)	32,000	32,000		32,000			
2008	Highway	2000 Chevy 1 Ton Dump (Unit 50/29)	46,000	46,000		46,000			
2007	Highway	1985 Mack 10 Whl Dump (Unit 10)	150,000	90,000			30,000	30,000	30,000
2008	Highway	2001 Chevy 1 Ton P/U (Unit 28)	46,000	46,000			46,000		
2008	Highway	2001 Chevy 1 Ton P/U (Unit 37)	46,000	46,000			46,000		
2008	Highway	2001 Chevy 1 Ton P/U (Unit 6)	46,000	46,000			46,000		
2008	Highway	2002 Chevy 1 Ton P/U (Unit38)	46,000	46,000			46,000		
2008	Highway	2002 Chevy 1 Ton P/U (Unit 40)	46,000	46,000				46,000	
2008	Highway	1999 John Deere Backhoe (Unit 16)	140,000	28,000					28,000
2008	Highway	2006 Chevy Pick-Up (Unit 1 )	32,000	32,000					32,000
2005	Library	Self-checkout & Security System	100,000	100,000		70,000	30,000		
2004	Library	Carpet replacement	82,000	82,000			82,000		

1st submitted	Department	Description	Total Proj.	Remaining	FY2008	FY2009	FY2010	FY2011	FY2012
2004	Library	Interior Painting	28,000	28,000			28,000		
2008	MIS	Wide Format Printer / Scanner	14,550	14,550	14,550				
2007	MIS	GIS Data Development	266,000	266,000	231,000	18,000	10,000	7,000	
2007	MIS	GIS Application Development	88,000	88,000	45,000	43,000			
2007	MIS	GIS Hardware	46,500	46,500	34,500	12,000			
2007	MIS	GIS Software / Training	49,500	49,500	18,500	10,000	10,500	10,500	
2007	Park & Rec	Replace Starting Platforms	14,500	14,500	14,500				
2008	Park & Rec	Locker Room Back Room Maintenance	15,000	15,000		15,000			
2008	Park & Rec	Tennis Court Maint Featherland	10,000	10,000		10,000			
2008	Park & Rec	HVAC Roof Unit Atkinson Pool	100,000	100,000		100,000			
2008	Park & Rec	Tennis Court Maintenance Feeley	10,000	10,000		10,000			
2008	Park & Rec	Tennis Court New Install Featherland	100,000	100,000			100,000		
2008	Parks & Grnds	1989 Hustler Mower (Unit PR16)	23,000	23,000	23,000				
2008	Parks & Grnds	2002 Chevy Pick-Up (Unit PR3)	35,000	35,000		35,000			
2008	Parks & Grnds	2001 Chevy Dump 6 Whl (Unit PR1)	46,000	46,000			46,000		
2008	Parks & Grnds	2002 Chevy Pick-Up (Unit PR4)	35,000	35,000				35,000	
2007	Planning	Town Center Traffic Improvements	1,470,000	1,470,000	70,000	1,400,000			
2008	Planning	Walkways	300,000	300,000	100,000		100,000		100,000
2007	Police	New Police Station	8,200,000	8,200,000	8,200,000				
2008	School	(2) Student Transportation Vans	44,000	44,000		44,000			
2008	School	Distance Learning Classroom	65,000	65,000		65,000			
2008	School	Truck with Plow	35,000	35,000		35,000			
2007	Selectmen	Town Hall Offices	8,200,000	8,200,000			8,200,000		
2008	Town Clerk	IKON IR5570 Image Runner/Archives	11,500	11,500	11,500				
2007	Treasurer	MUNIS Tax Software Modules	62,490	49,992	12,498	12,498	12,498	12,498	

\$ 24,525,040 \$ 24,163,342 \$ 9,438,148 \$ 3,473,298 \$ 9,708,298 \$ 1,004,298 \$ 539,300

# Section Nine

## APPENDICES



## APPENDIX ONE: 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 bonafide 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.

**Accrual Basis for Accounting:** A method of accounting that recognizes revenue when earned, rather than when collected, and recognizes expenses when incurred, rather than when paid.

**Appropriation:** An authorization granted by the Town Meeting to make expenditures and to incur obligations for specific purposes. Appropriations for any expenditure specify dollar amounts, funding sources, and a period of time within which the funds must be spent. Any funds not expended within the specified time (usually one fiscal year) revert to the Unreserved Fund Balance.

**Article:** An article or item on the Warrant of the Annual Town Meeting. There are seven standard budget related articles that appear in the Warrant every year as follows:

- Operating Budget (for the upcoming fiscal year),
- Budget Adjustment (for adjustments to the current fiscal year's budget that was appropriated at the previous year's Town Meeting)
- Prior Year Unpaid Bills

- Enterprise Fund Budgets (one for each enterprise fund)
- Capital Budget (an omnibus article for capital items funded within the levy)
- Capital Projects (for any capital item funded through a request for an override of Proposition 2 ½ limits. This can be an omnibus article for multiple projects or a separate article for a significant project).
- Stabilization Fund (for adding to the Town's Stabilization Reserve Account)

**Assessed Valuation:** The valuation of real estate or other property determined by the Town Assessor for tax levying purposes. The Commonwealth certifies the values and methodology in determining those values every three years.

**Assets:** Property, plant and equipment owned by the Town.

**Audit:** A comprehensive examination as to the manner in which the government's resources were actually utilized concluding in a written report of its findings. An accounting audit is intended to ascertain whether financial statements fairly present the financial position and results of operations of the Town. The Town is required to conduct an audit annually.

**Available Funds (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 (see Available Fund).

**Budget:** A plan of financial operation embodying an estimate of proposed expenditures for a given period with proposed means of financing. Sudbury's budget is a financial plan that is established for a single fiscal year that begins on July 1 and ends on June 30.



**Capital Budget:** A plan of major, non-recurring expenditures 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.

**Capital Improvement Plan:** A financial planning and management tool which identifies new public facility and equipment requirements, or improvements; places these requirements in order of priority; and schedules them for funding and implementation.

**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.

**Cost Center:** The three major governmental entities funded by the operating budget – the Town of Sudbury Operating Departments, the Sudbury Public Schools, and the Lincoln-Sudbury Regional High School – which together account for over 92% of the annual operating budget.

**Debt Exemption:** An override to Proposition 2 ½ for the purpose of raising funds for debt service costs.

**Debt Service:** Payment of interest and principal on an obligation resulting from the issuance of bonds.

**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.

**Expenditure:** Decrease in net financial resources for the purpose of acquiring or providing goods and services.

**Expenses:** The cost of delivering or producing goods, rendering services or carrying out other activities that constitute the entity's ongoing major or central operations. Expenses consist of the following objects of expenditure: Utilities, Supplies and Materials, Contractual Services, and Equipment.

**Fiscal Year:** A 12-month period over which an organization conducts business and budgets its spending. Sudbury's fiscal year runs from July 1 through June 30th. The fiscal year is commonly referred to by the date (year) in which it ends.

**Fund Balance:** *The specifically identified funds allocated to meet budget requirements/ expenses.*

**Funding Source:** The excess of assets over liabilities also known as surplus funds. A negative fund balance is a deficit.

**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 (see Available Fund).

**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.

**General Fund:** Revenues derived from the tax levy, state aid, local receipts and available funds are considered General Fund revenues. The General Fund is distinguished from Enterprise Funds and Special Revenue Funds.

**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.

**Modified Accrual Basis for Accounting:** A method of accounting that recognizes revenue when it is actually received and recognizes expenditures when a commitment is made.

**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.

**Operating Budget:** The portion of the budget that pertains to daily operations, or providing basic services throughout the fiscal year. The operating budget contains appropriations for such expenditures as personnel, supplies, utilities, materials, travel, and fuel and the proposed means of financing them.

**Operating Expenditure:** An ongoing or recurring cost of performing a function or providing a service. Operating expenditures include personal services, supplies and materials, utilities, contractual services, minor equipment, and debt service.

**Overlay:** The amount raised in the tax levy for funding abatements granted by the Board of Assessors due to overvaluation or uncollectible tax bills.

**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.

**Performance/Workload Indicators:** Specific quantitative and qualitative measures of work performed as an objective of the department. Sudbury departments typically use of the following types of indicators: workload measures, efficiency measures and outcome measures.

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

**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.

**Retained Earnings:** The equity account reflecting the accumulated earnings of the enterprise funds.

**Revenue:** Budgetary resources. The various revenues the Town receives are listed in the Revenue Summary in the Budget Overview section.

**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.

**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.

**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.

**Tax Levy Limit:** The maximum amount that can be raised within Proposition 2 ½.

**Tax Rate:** The amount of tax levied for each \$1,000 of assessed valuation.

**Unclassified 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 townwide operations and are not assigned to any one department or cost center.

**User Fees:** Fees paid for direct receipt of a public service by the user or beneficiary of the service.

## APPENDIX TWO: HISTORY OF PROPOSITION 2 ½ OVERRIDES

HISTORY OF APPROVED OPERATING OVERRIDES FY1991 - FY2006							
Date of Ballot	Year Funded	SPS	LS	Stabilization	Town	Capital	TOTAL
May-90	FY 91	\$250,000	\$135,000	\$0	\$175,000	\$0	\$560,000
		44.64%	24.11%		31.25%		100.00%
May-91	FY 92	\$150,000	\$100,000	\$0	\$65,000	\$0	\$315,000
		47.62%	31.75%		20.63%		100.00%
May-98	FY 99	\$592,250		\$0		\$0	\$592,250
		100.00%					100.00%
Mar-00	FY 01	\$1,034,659	\$333,139	\$200,000	\$173,148	\$0	\$1,740,946
		59.43%	19.14%	11.49%	9.95%		100.00%
May-01	FY02	\$337,712	\$371,972	\$0	\$309,136	\$0	\$1,018,820
		33.15%	36.51%		30.34%		100.00%
Mar-02	FY 03	\$1,599,687	\$575,100	\$0	\$757,208	\$68,000	\$2,999,995
		53.32%	19.17%		25.24%	2.27%	100.00%
Mar-05	FY06	\$1,147,940	\$1,122,950	\$0	\$699,800	\$79,310	\$3,050,000
		37.64%	36.82%		22.94%	2.60%	100.00%
	<b>Total</b>	<b>\$5,112,248</b>	<b>\$2,638,161</b>	<b>\$200,000</b>	<b>\$2,179,292</b>	<b>\$147,310</b>	<b>\$10,277,011</b>
		49.74%	25.67%	1.95%	21.21%	1.43%	100.00%
HISTORY OF APPROVED DEBT and CAPITAL EXCLUSIONS FY1991 - FY2006							
Yr of Ballot	SPS Debt	LS Debt	Land Acquisition Debt	Town Debt	Capital Exclusions	TOTAL	
FY 91		\$0	\$1,000,000	\$0	\$0	\$1,000,000	
			100.00%			100.00%	
FY 92	\$0		\$1,000,000	\$0	\$0	\$1,000,000	
			100.00%			100.00%	
FY 93	\$0	\$2,134,424	\$0	\$0	\$0	\$2,134,424	
		100.00%				100.00%	
FY 94	\$5,451,000	\$0	\$0	\$399,000	\$0	\$5,850,000	
	93.18%			6.82%		100.00%	
FY 95	\$0	\$0	\$0	\$2,900,000	\$0	\$2,900,000	
				100.00%		100.00%	
FY 96	\$2,650,000	\$0	\$0	\$0	\$0	\$2,650,000	
	100.00%					100.00%	
FY 97	\$43,604,000	\$0	\$0	\$168,500	\$0	\$43,772,500	
	99.62%			0.38%		100.00%	
FY 98	\$0	\$0	\$8,690,000	\$0	\$0	\$8,690,000	
						0.00%	
FY 99	\$0	\$1,500,000	\$315,000	\$0	\$782,500	\$2,597,500	
						0.00%	
FY 00	\$0	\$0	\$2,550,000	\$345,000	\$0	\$2,895,000	
						0.00%	
FY 01	\$0	\$68,500,000	\$0	\$5,273,800	\$0	\$73,773,800	
		92.85%		7.15%		100.00%	
FY02	\$0	\$3,900,000	\$0	\$0	\$0	\$3,900,000	
		100.00%				100.00%	
FY 05	\$0	\$0	\$0	\$650,000	\$0	\$650,000	
	0.00%	0.00%		100.00%		100.00%	
FY 06	\$0	\$0	\$0	\$0	\$0	\$0	
						0.00%	
	<b>Total</b>	<b>\$51,705,000</b>	<b>\$73,900,000</b>	<b>\$13,555,000</b>	<b>\$9,736,300</b>	<b>\$782,500</b>	<b>\$149,678,800</b>
		34.54%	49.37%	9.06%	6.50%	0.52%	100.00%

**APPENDIX THREE: RESIDENTIAL TAX RATE HISTORY**

Residential Tax History Fiscal Year 2000 to 2007						
Fiscal Year	Number of Parcels	Average Single Family Value	RES Tax Rate	AVG SFD RES Tax Bill	AVG SFD RES % CHG	AVG SFD RES Dollar CHG
2000	5,141	359,388	\$16.66	5,987		
2001	5,192	426,486	\$15.56	6,636	10.8%	\$649
2002	5,235	432,961	\$17.09	7,399	11.5%	\$763
2003	5,251	479,865	\$16.78	8,052	8.8%	\$653
2004	5,292	596,200	\$13.46	8,025	-0.3%	(\$27)
2005	5,307	601,849	\$13.46	8,101	0.9%	\$76
2006	5,332	661,000	\$13.55	8,957	10.6%	\$856
2007	5,341	702,800	\$13.12	9,221	2.9%	\$264

**APPENDIX FOUR: POPULATION HISTORY  
TOWN OF SUDBURY  
POPULATION  
1790 TO 2006**

<b>YEAR</b>	<b>POP</b>	<b>YEAR</b>	<b>POP</b>
1790	1,290	1970	13,350
1800	1,303	1971	13,882
1810	1,287	1972	14,460
1820	1,417	1973	14,872
1830	1,423	1974	15,047
1840	1,422	1975	15,092
1850	1,578	1976	14,923
1855	1,673	1977	15,047
1860	1,691	1978	14,930
1875	1,177	1979	15,023
1880	1,178	1980	14,972
1885	1,165	1981	14,726
1890	1,197	1982	14,599
1895	1,141	1983	14,548
1900	1,150	1984	14,444
1910	1,120	1985	14,242
1915	1,206	1986	14,395
1920	1,121	1987	14,561
1925	1,394	1988	15,390
1930	1,182	1989	15,662
1935	1,638	1990	15,800
1940	1,754	1991	14,891
1945	2,051	1992	14,543
1948	2,241	1993	15,325
1949	2,431	1994	15,713
1950	2,597	1995	15,510
1951	2,733	1996	16,079
1952	2,898	1997	16,542
1953	2,946	1998	16,923
1954	3,415	1999	16,532
1955	3,646	2000	16,929
1956	4,251	2001	17,245
1957	5,204	2002	17,423
1958	5,793	2003	17,678
1959	6,592	2004	17,925
1960	7,450	2005	18,107
1964	10,492	2006	18,207
1965	10,894	2007	
1966	11,275	2008	
1967	11,869	2009	
1968	12,200	2010	
1969	12,823	2011	

## **APPENDIX FIVE: TOWN ENERGY MANAGEMENT PROGRAM (draft)**

**Selectmen's Goal: Examine ways for the Town to be more fuel and energy efficient.**

Reasons to be more energy efficient:

1. prevents waste
2. cost of utilities is climbing and consuming more of our limited budgets
3. helps the environment when we use less fossil fuel

Well before Hurricane Katrina hit, or gasoline prices rose this summer, the Board of Selectmen asked the Town Manager and Town department heads to look into what could be done to reduce energy costs, or at least try to minimize how much more of the Town's budget will be spent on energy costs in the future. I have been working with department heads to evaluate what we are already doing, what more can be done, and what areas hold the most promise.

First, in background, we believe the Town of Sudbury spent about \$1.2 million on energy related costs in FY05, with the Town offices accounting for about \$335,000 of this (approximately 27%), Sudbury Public Schools accounting for the rest. This is down from \$351,000 slightly for town buildings in FY04. These are just approximate numbers – we pay many different vendors and had not previously coded these costs to roll up to a total. We will use a new coding system to help us track better for the future.

The first thing I found when looking at this issue is how much Town staff has already done and continues to work on to analyze and reduce energy costs in Town buildings over the past few years. Jim Kelly and Art Richard have systematically looked at all the ways that the Town buildings could be improved for energy use reduction, and put in place those improvements they could do within the limited maintenance budget we allocate for that use.

The Town's Energy Management Program reflects what we have been doing and will be continuing to do as what more we believe we can be doing in the Future. This Energy Management Program is draft at this time, but this is the framework we will be working within as we continue on this goal.

### **Town of Sudbury Energy Management Program**

There are three primary components of our Energy Management Program. Each is described below.

- I. Consumption Management**
  - a. We will use operations and maintenance best practices
  - b. We will continue to do bill analysis and look for savings opportunities
  - c. We will continue to use programmable thermostats and control the settings
  - d. Where it makes sense for safety and energy management reasons, lights will be put on motion activators and timers
  - e. We will continue and enhance the training and guidelines given to staff on best uses and choices. For example:
    - i. Turning off lights and equipment when not using
    - ii. Not pushing up the heat for one person
    - iii. Restricting the use of one person heaters
  - f. We will continue developing ideas for dealing with the buildings we have.  
Factors that make it very challenging to conserve energy:
    - i. Old drafty buildings – not built with conservation in mind
    - ii. Old heating systems – Flynn, Police Station, Fairbank

- iii. Old windows – Flynn Building, Fairbank
- iv. Some buildings are used 24/7, do not have an “unused” time in day
  - 1. Fire, Police
- v. Some buildings are used long hours of the day
  - 1. Library, Pool
- vi. Some buildings are used by the public for meetings
  - 1. Town Hall, Fairbank Center, Flynn Building, Library

## **II. Facility Assessment and Improvements**

- a. Already done:
  - i. Purchased street lights – estimate savings at least \$20K in FY06, could be more
  - ii. We have retrofitted older buildings with insulation
  - iii. We have replaced windows in Town Hall and most of Flynn Building, Atkinson Pool
  - iv. We have done energy audits in some buildings and made recommended improvements (Fire Station)
  - v. We have put in all new energy efficient light bulbs in the Park and Recreation and Atkinson Pool areas
  - vi. We have put in LED in our traffic signals which use less energy
  - vii. We have some new construction – Library and DPW building – which are designed more efficiently
- b. Improvements in progress
  - i. We have asked Keyspan to conduct energy audits on buildings
  - ii. We have asked for money to replace the boilers in Fairbank building – could recoup our expenses through our savings very quickly on this project
  - iii. We continue to examine lighting in buildings for savings possibilities
- c. Improvements we plan to make
  - i. Build a new Police Station – construct new with conservation in mind. This is one of the worst buildings for energy loss
  - ii. Replace the rest of the windows in Flynn Building
  - iii. Replace windows in Fairbank

## **III. Procurement of energy supply**

- a. Electricity
  - i. We began bidding for electric supply with other towns several years ago – Jan, Jim Kelly and Maureen participate in this, along with SPS Business Manager Mary Will
  - ii. Currently we are paying 5.55 cents per therm. At the time we locked that rate in three years ago, that was market rate, so no real savings in the first year. But today, for the November – January period, NSTAR is charging customers of our size 9.6 cents. Jan estimates that for this calendar year, we are probably saving \$125,000 because we bid and locked in this rate two years ago. Next year we stand to save roughly \$225,000 if prices stay high, as our 5.55 cent rate continues through calendar 2006. (Because we bid for SPS too, they get 75% of the savings, but the taxpayers get it all).
  - iii. We have recently locked in a price that will go into effect at the end of 2006. We went out to bid 5 times over the last 5 months, carefully watched the trends, and finally decided to lock in at a rate that is comparable to October market rate for NSTAR default customers. But our best expectations is that energy costs will continue to climb and two years from now we will be happy that we secured a constant supply at a set rate.



- iv. We did adopt the green certificate. Small percent higher to use more environmentally safer energy supply
- b. Natural Gas.
  - v. Now looking at our natural gas contract. Current contract lapses in August of FY06.

## APPENDIX SIX: THE C.A.R.E PROGRAM

**To:** Board of Selectmen  
Finance Committee

**From:** Maureen G. Valente, Town Manager  
Senior Management Team – Police Chief Fadgen, Fire Chief MacLean, DPW  
Director Place, Planning Director Kablack, Finance Director Petersen,  
Assistant Town Manager/Personnel Director Walker

**Subject:** The C.A.R.E. Program: Cost Avoidance and Revenue Enhancement Efforts  
by the Town Government

Attached is a report that the Senior Management Team and I have developed to inform the Board of Selectmen, the Finance Committee, and the community at large about the many steps Town staff have taken to enhance revenues, and to avoid costs that otherwise divert resources away from core services. When you add up these efforts, they result in significant dollar savings. Section One looks at Cost Avoidance and Reduction efforts. Section Two addresses Revenue Enhancement efforts.

The last section of the report contains ideas that have not been studied by staff as yet, but we believe hold promise for becoming part of our C.A.R.E. program. We are including them so that the Board of Selectmen and Finance Committee can begin thinking about them philosophically, before staff puts in time and effort toward exploring these ideas further. We welcome suggestions from Selectmen, Finance Committee members, Town staff and residents of Sudbury community on other ideas for cost avoidance and revenue enhancement you may have that we can add to this list. <sup>4</sup>

Please note that I have not listed the number one way we have worked to reduce costs, and that is by maintaining our AAA credit rating.

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

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

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<sup>4</sup> Note the items in the C.A.R.E. program relate to efforts that are primarily management in nature, and are NOT items that are more properly within the realm of policy decision-making of the Board of Selectmen.

## **The Sudbury C.A.R.E. PROGRAM: Cost Avoidance and Revenue Enhancement**

### I. Cost Avoidance Efforts

#### Effort #1: Debt Refinancing

The Town has refinanced outstanding debt twice in the past 24 months to take advantage of lower interest rates. We conducted an advance refunding of \$4,350,000 in June 2005 and an advance refunding of \$13,400,000 in January 2005 to take advantage of lower interest rates.

- a. Estimated savings over the life of these bonds: \$787,000

#### Effort #2: Purchase of Street Lights

The Town purchased street lights from NSTAR and bid out their maintenance. We achieved cost reductions by ending maintenance payments to NSTAR and instead competitively contracting out the maintenance. An additional advantage of this effort is better maintenance and repair of street lights than NSTAR had provided

- a. Estimated annual savings: \$29,000
- b. Estimated savings over five years: \$145,000.

#### Effort # 3: Streamlined Tax Payment Processing

After the Town reduced the staffing in the Tax Collectors' office by ½ positions, we put in place or enhanced our use of technology or other approaches to enable us to continue processing payments without increased delays. We have added an on-line payment option, enhanced the use of a lockbox outsourcing service and we provide automated files to mortgage services so they can post payments to our system. We have also added a tax drop box outside the building and begun a listserve option so that taxpayers can sign up to know when bills are mailed and due. All this makes it possible to provide the same high level of service even with a staff reduction.

- a. Estimated annual savings from reducing by ½ position: \$14,000
- b. Estimated savings over five years: \$70,000

#### Effort # 4: Energy Management Program

Per the direction of the Board of Selectmen, Town staff has spent considerable time investigating and implementing various energy management steps. A description of these efforts is found in Appendix 4 of the FY07 Town of Sudbury Annual Budget and Financing Plan, entitled **Energy Management Program**.

- a. Estimated annual savings from purchasing of energy supplies: \$125,000 for calendar 2005, \$225,000 for calendar 2006
- b. Estimated savings over five years: Uncertain, depends on future energy costs

#### Effort # 5: Vehicle/Fleet Management Program

The Town has not purchased any new automobiles except for police and fire departments, in several years. Instead, we began a program of retaining and "passing down" detective cars and fire command SUVs to other departments after 4 – 5 years use. Departments which are assigned one of these used vehicles include: Engineering (2 vehicles), Building Inspector (2 vehicles), Assessors Office (1 vehicle), Technology Administrator (1 vehicle), Building Maintenance (2 Vehicles), and Dog Officer (1 vehicle).

- a. Annual cost to the Town for one of these vehicles is estimated at \$2,080: \$500 for insurance + \$1080 for gasoline+ 500 for parts/repair.
- b. Annual cost for reimbursing employee for using personally owned vehicle could exceed \$3,200 per employee (Assume use 240 days/year, 30 miles per day, mileage reimbursement rate of \$.445 per mile)
- c. Estimated annual savings for retaining and using 9 vehicles rather than reimbursing for personal vehicles: \$10,000

- d. Estimated savings over five years: \$50,000

Effort # 6: Regional Purchasing Programs

The Town has entered into three different regional purchasing efforts in the past two years. Regional approaches to bidding and purchasing has many advantages. It reduces administrative costs because only one bid is developed and overseen. Preparing bid specifications, advertising, answering questions of potential bidders, etc. is very time consuming. The savings quoted below do not include those staff costs which are avoided, only the direct costs, but the time savings are important to consider as well. Also, bidders are often more aggressive in reducing their proposed price in the hopes of landing larger book of business.

- a. Ambulance Billing – Fire Chiefs in the area worked together to develop an overall bid for billing for ambulance services. The rate for ambulance billing went from 6.5% to 4%, saving about \$7,500 annually, or \$37,500 over five years.
- b. Office Supplies – The Town Managers in this area group bid office supplies and received a discount over catalog price of 80%.
- c. Police vehicles – Police Chiefs in this area worked together to develop overall bids for police vehicles. Average price per vehicle went from \$24,000 to \$22,478, a savings of \$1,588 per vehicle or \$7,710 annually. Five year savings estimate: \$38,050.

Effort # 7: Self insuring for unemployment compensation

The Town annually re-evaluates the savings possible from self insuring for unemployment compensation.

- a. Current amount Town budgets is \$39,000
- b. Alternative is to pay annual premium of 1% of annual payroll, which for calendar year 2005, gross payroll total for SPS plus Town was \$28,575,304 so 1% is approximately \$285,753.
- c. Estimated annual savings: \$285,753
- d. Estimated savings over 5 years: \$1,428,000

Effort # 8: Contracting out cleaning services

- a. Town has contracted out cleaning services for town buildings
- b. Estimated annual savings: \$14,000
- c. Estimated savings over 5 years: \$70,000

Effort # 9: Switching to bi-weekly payroll for all employees

- a. State law does not allow any less frequent payment, such as monthly
- b. Reduces administrative and banking costs for not running weekly payrolls
- c. Estimated annual savings: \$15,000
- d. Estimated savings over 5 years: \$75,000

Effort # 10: Join the MIIA Rewards Program for Worker's Compensation, Property and Liability Insurance

The Town belongs to a collaborative formed by the Massachusetts Municipal Association, known as the Massachusetts Interlocal Insurance Association. We achieve better coverage at a lower price through participation in MIIA, and we receive financial rewards for taking actions that result in lower claims.

- a. Estimated annual savings: approximately \$8,800 in credits
- b. Estimated savings over 5 years: \$44,000

Effort # 11: Leasing Town owned office building

The Town owns the Loring Parsonage, which is no longer needed as a Town office building. The Town has leased this building to the Sudbury Foundation on a short term basis, and under the lease the Foundation pays all the utilities. The Selectmen and Town Manager will be working with others to determine the long term uses for the Parsonage, with a goal to have its annual operating costs NOT be carried on the tax levy unless it is being used for a town office building again.

- a. Estimated annual savings: \$18,162
- b. Estimated savings over 5 years: unknown as current lease arrangement is only for two years.

#### Effort # 12: DPW Reorganization

The Town has reorganized and streamlined DPW operations and personnel, pursuant to the Town Manager Act. This reorganization allows the Town to have two fewer high level supervisory positions, and we have instead added two equipment operators. These positions would have needed to be added to cope with the growing work load. This has also contributed to higher productivity in the face in growing demands for services from residents. Quantifiable savings are as follows:

- a. Estimated annual savings of funding two equipment operators out of eliminated supervisory positions: \$40,000 (difference between supervisory salary and equipment operator salary)

## II. Revenue Enhancement Efforts

#### Effort # 1: Annually evaluate fees charged by Town of Sudbury

Town staff annually evaluates the amount and nature of the fees that are charged for services that directly benefit individual users rather than the public at large. Where the intent of the fee is to cover 100% of the cost of the service, it is necessary to make periodic adjustments in the amount of the fee as Town costs rise. The Town has increased several fees, including fees in the Town Clerk's office, ambulance transport fees and advance life support reimbursement fees, among others.

For FY06, the Selectmen voted to establish a new burning permit fee. For this new fee alone:

- a. Estimated annual revenue generated: \$10,000
- b. Estimated revenue over 5 year period: \$50,000
- c. Fee will be set up as revolving fund to cover costs of building an on-line system for obtaining the burning permit, and communicating with permit holders on safe use of the permit (e.g. daily conditions).

#### Effort # 2: Use Town owned assets to generate income

There are two major efforts here: leases from cell towers and selling of gravel from the Town's gravel pit.

- a. Cell tower leases:
  - a. Town leases town owned land for cell towers.
  - b. Estimated annual revenue generated: \$120,000
  - c. Estimated revenue over 5 year period: \$600,000
- b. Gravel sales.
  - a. Town works with buyers of gravel (borrow) to supply as needed
  - b. Revenue generated to General Fund annually: \$100,000
  - c. Revenue generated to General Fund over 5 year period: \$500,000

#### Effort # 3: Town is looking to sell non-developable land to interested parties

There are a number of small parcels of land in Town which are too wet or nonconforming to be developed and owners have stopped paying taxes on. The Town can take these parcels for nonpayment of taxes, and then sell them to interested parties. Negotiations are in progress with Federal government, with abutters and any others who might be interested in purchasing these from the Town if we do the work to take title to them. The process is cumbersome, time consuming and expensive to foreclose or do a land of low value taking but if we know of a buyer, it can be worthwhile.

- a. Potential revenue: unknown at this point, but could be \$50,000 to \$100,000 in one time revenue from sales

Effort # 4: Accelerating collection of Tax Title cases

The Tax Collector's office has been giving concentrated efforts into resolving older tax delinquencies by finding missing owners, using a Town bylaw which denies permits to tax scofflaws, putting mortgage companies on notice, and other staff intensive efforts. These are the more "stubborn" cases such as where there are heirs to property to be tracked down, a developer who is not paying on multiple properties, or other circumstances that require extraordinary staff time to resolve. For comparison purposes, in FY04 \$120,000 in tax title was collected.

- a. Estimated revenue: Collected \$395,000 tax title in FY05, and \$415,000 thus far in FY06.
- b. Estimated revenue over 5 years: unknown at this point once backlog is cleared up
- c. NOTE: Extra revenue gets generated in this process because there are penalties and interest charged on the tax title accounts, and these collected dollars become investable balances, leading to increased investment income as well.

Effort # 5: Cash Management and Investment Income

The Treasurer is working on reducing the cost of banking services and enhancing the investment return earned by investing town funds. Actions she has taken thus far:

- a. Reduced number of banks the Town is using, by 5.
- b. Also significantly reduced number of bank accounts by removing duplicate/inactive accounts.
- c. Reduced number of investment firms by 2.
- d. Estimated annual increase in revenue due to these efforts is difficult to quantify because market conditions also affect investment earnings. However, investment income in FY05 was up from FY04 by more than \$100,000.

Effort # 6: Grants and Gifts.

Town staff develops and submits grant applications to numerous entities for support of Town priorities. Often our efforts are rejected because Sudbury appears to be too wealthy to meet granting agencies criteria. Nevertheless, we continue to put in the staff time to develop those we believe might consider our request. Here is a summary of recent grants awarded to Town Departments.

- a. Total Fire Department grants awarded in FY05 and FY06 to date: \$86,904
- b. Total Police Department grants awarded in FY05 and FY06 to date: \$35,296
- c. Total Council on Aging grants awarded in FY05 and FY06 to date: \$54,191
- d. Total to other Town departments in FY05 and FY06 to date: \$171,000

## C.A.R.E. IDEAS FOR FUTURE CONSIDERATION

### Proposed Effort # 1: Examine Payment in Lieu of Taxes to Town.

- a. Town currently receives PILOT payments from the Federal government, state government and one non-profit in Sudbury.
- b. Staff will work to see if other non-profits in Sudbury could be encouraged to make a public safety PILOT payment to the Town in recognition of the public safety services received but not paid for by the non-profit entity.
- c. Estimated revenue possible: unknown at this time

### Proposed Effort # 2: Begin an Emergency Response Cost Recovery Program

- a. Town public safety departments respond to a number of vehicle accidents annually
- b. Staff is examining if any of the costs expended for these efforts can be recovered from the insurance companies of the owner's of the vehicles
- c. Selectmen will examine if this is an approach they believe is in the Town's best interest
- d. Estimated revenue possible: unknown at this time

### Proposed Effort # 3: Examine potential collaboration with Sudbury Public Schools for shared facilities maintenance.

### Proposed Effort # 4: Examine potential benefits of building and maintaining a multipurpose municipal wireless broadband network that would provide coverage for the entire community.

### Proposed Effort # 5: Examine potential benefits of building and maintaining a Town of Sudbury municipal light plant.

### Proposed Effort # 6: Examine possibility for converting more Town services to "e-services", and automating as many routine and repetitive procedures as possible.

### Proposed Effort # 7: Develop a list of laws that cost the Town additional funds but offer no value added for our citizens, and ask State legislators to change the laws

### Proposed Effort # 8: Examine options for regionalization or collaboration in new areas

### Proposed Effort # 9: Examining feasibility of paying Town and School employees a cash incentive NOT to take Town health insurance if they have such insurance available elsewhere

### Proposed Effort # 10: Have Town staff open a passport office and take in revenue for processing passports

### Proposed Effort # 11: Examine capability for and advantages of running two ambulances instead of one.

**C.A.R.E. ESTIMATES SUMMARY**

**I. Cost Avoidance Estimates**

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

**II. Revenue Enhancements**

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



**APPENDIX SEVEN: FY06 Audit, Management's Discussion & Analysis**

(Not completed as of December 29, 2006 printing of this document)

# APPENDIX EIGHT: MIDDLESEX RETIREMENT SYSTEM

Investing in a new plan - Wilmington Advocate

Page 1 of 2

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## Investing in a new plan

By Franklin B. Tucker  
Thursday, December 07, 2006 - Updated: 11:53 AM EST

While the Middlesex Retirement System was created to secure the future of retired Middlesex county municipal workers, most towns viewed the investment fund management firm as a present day liability.

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With retirement costs escalating annually by double-digits, the smaller towns in Middlesex County have been saddled for the past 50 years with a fund that continually ran well behind the rest of the investment fraternity in the rate of return to the investors.

Finally, last week, after decades of complaints and demands for a change of direction, officials from member municipalities – led by Wilmington's Town Manager Mike Caira – finally forced the MRS to cede most of its investment plans over to a state-run plan.

Under pressure from state regulators, the MRS voted last week to transfer management of 85 percent of its \$700 million portfolio to the Pension Reserve Investment Trust.

"We did what is in the best interest of our members and beneficiaries," said Thomas Gibson, chairman of the Middlesex Retirement System.

Middlesex voted to move management of its assets two days before its regulator, the Public Employee Retirement Administration Commission, was scheduled to meet, possibly to force the transfer.

With a portfolio of \$43 billion, PRIT has buying power to reduce costs and negotiate lower fees.

And the need for greater investment returns is needed more than ever as retirement costs match health payments as two of the largest and fastest growing line items in municipal budgets.

In the coming fiscal year beginning July 1, 2007, Wilmington will allocate \$3.2 million towards retirement funds, a jump of 10 percent from the \$2.9 it spent in 2007 said Ronald Mendes, Wilmington's treasurer and collector.

That is actually lower than the past years that saw an annual increase of 15 percent to 18 percent, he said.

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Cap on raises

One of the reasons Wilmington residents will be doing out a smaller increase than past years is the town's ability to keep wage increases to a minimum – last fiscal year, Wilmington saw base salaries increase by a mere 2.9 percent.

"We've kept it down for a while as local aid decreased," said Mendes

Wilmington has been bound to the Middlesex Retirement System since 1946, when state legislation required all communities in Middlesex County fewer than 12,000 to join.

The biggest problem facing the fund was an ability to miss investment targets on a regular basis. While the standard Dow Jones stock market index was making just over 11 percent a year between 1985 to 2005, MRS trudged in at 9.64 percent.

For example, in 2005, MRS made 7.47 percent on its investment. By comparison, the Public Employee Retirement Administration took in 12.79 percent.

Even more telling was how badly were MRS predictions of growth, claiming to investors they would make 8.62 percent.

For the past six years, "we've been rattling the cages," going so far as town managers from affective towns filed legislation to restructure the system, said Mendes.

It was only when state oversight brought the spotlight on several questionable actions did the MRS board began to raise the question of changing its investment strategy.

In April, PERAC appointed an overseer to Middlesex the day after getting a scathing report from state Inspector General Gregory Sullivan. He accused the retirement board of "a profound breach of public trust and a misuse of beneficiaries' money" over the

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bidding process for renovations of its new headquarters in Billerica.

The general contractor and building supervisor, John C. MacDonald, resigned as supervisor Nov. 9. The same day, his close friend, Middlesex Retirement Board member Lawrence Driscoll, a retired Tewksbury firefighter, resigned over charges that he faked some \$10,000 in business expenses.

Recent problems notwithstanding, Mendes says the MRS has done more good than harm.

"If every town had its own portfolio, it would have its own set of administrative staff and costs," Mendes said.

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978-439-3000

VICE CHAIRMAN  
BRIAN P. CURTIN  
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SECRETARY  
JAMES M. GOOKIN  
978-957-5047

*Commonwealth of Massachusetts*  
**MIDDLESEX RETIREMENT SYSTEM**

25 LINNELL CIRCLE  
P.O. BOX 160  
BILLERICA, MA 01865  
800-258-3805 • 978-439-3000 • FAX: 978-439-3050

ELECTED TRUSTEE  
LAWRENCE P. DRISCOLL  
978-674-0211

ELECTED TRUSTEE  
JOHN H. BURKE, SR.  
978-649-1501

DIRECTOR  
JACQUELINE L. WILLIAMS  
978-439-3000

**MEMORANDUM**

**TO: The Middlesex Retirement Board Advisory Council**

**FROM: Thomas F. Gibson, Chairman  
Middlesex Retirement Board**

**Brian P. Curtin, Chairman  
Middlesex Retirement Board Advisory Council**

**DATE: November 16, 2006**

We are writing to inform you of recent events at the Middlesex Retirement Board, and to seek the Council's input on a critical issue relating to the management of the System's assets.

***RESIGNATION OF LAWRENCE P. DRISCOLL***

At its meeting of November 9, 2006, the Board accepted the resignation of Lawrence P. Driscoll, the elected fourth member of the Board. Mr. Driscoll's resignation followed the Board's receipt of a report from the Office of the Inspector General which asserted improprieties in expense reimbursement requests submitted to the Board by Mr. Driscoll from 2001 through 2004. Mr. Driscoll has stepped down from the Board in order to address these issues.

The Board's auditors and PERAC's auditors conduct regular audits of travel and expense reimbursements submitted by members of the Middlesex Board and its staff. As you are aware, on September 29, 2004, the Board's own auditors raised questions regarding Mr. Driscoll's travel and expense reimbursements. The Board, in keeping with its fiduciary duties, made full and immediate disclosure to the appropriate agencies, i.e., PERAC and the Attorney General. The Board also took action to investigate the travel and expense reimbursements that the Board's auditors had questioned. Following that investigation, the Board obtained repayment from Mr. Driscoll in the amount of \$1,240.54 for travel expenses and \$1,119.47 for meal expenses that were improperly reimbursed as lacking appropriate documentation, and an apology from Mr. Driscoll regarding his recordkeeping related to his travel and expense reimbursements. The Attorney General, after its own investigation, informed PERAC in April 2005 that it would not pursue the matter further.

Following the Attorney General's review, PERAC asked the Inspector General in April of 2005 to conduct his own investigation. In the course of his investigation, the Inspector General invoked his statutory powers to obtain documents and information that neither the Board's

EMAIL: [MRS@MIDDLESEXRETIREMENT.ORG](mailto:MRS@MIDDLESEXRETIREMENT.ORG)  
WWW: [WWW.MIDDLESEXRETIREMENT.ORG](http://WWW.MIDDLESEXRETIREMENT.ORG)



auditors nor PERAC's auditors had the statutory power to obtain. The Board learned the results of that investigation from PERAC after the Inspector General wrote a letter to PERAC on October 23, 2006. In that letter, the Inspector General asserted that he found numerous instances in which Mr. Driscoll had submitted false expenses, and that Mr. Driscoll had submitted the same expenses to his employer. The Inspector General also asserted that the Middlesex Retirement Board had "turned a blind eye" to Mr. Driscoll's questionable expenses. We certainly do not agree with that rhetoric nor, as noted above, is it supported by the record: the Board has consistently taken action to recoup improperly paid expenses when circumstances required, and did so in this instance.

The Board is, of course, seriously concerned about the results of the Inspector General's review of this matter and we have requested that the Inspector General provide access to these documents to the Board and its representatives in order that the Board can properly assess what further action is warranted. The Board is actively pursuing these issues and has voted to terminate all credit accounts for the Middlesex Retirement Board, and to suspend any pending expense reimbursements to Mr. Driscoll until further notice. The Board will be working with PERAC to review all recent expense reimbursements, and to ensure that the Board's reimbursement policy continues to be suitable.

The Board has also taken actions to address the issues raised by the Board's auditors. For instance, at its meeting of February 10, 2005, the Board adopted a new Policy on Payment of Expense Reimbursements, a policy based upon PERAC's Travel/Education Policy. This policy, which was filed with PERAC, provides now for a tri-level review and sign-off of all requests for expense reimbursements.

Lastly, under G.L. c. 34B, s. 19(h) the Council will be notified to conduct an election to fill the remainder of the fourth member's term, which expires on December 31, 2008.

#### ***RESIGNATION OF JOHN C. MACDONALD***

At its meeting of November 9, 2006, the Board accepted the resignation of John C. MacDonald, Building Supervisor. Mr. MacDonald was the general contractor who managed the renovations of the Board's offices at 25 Linnell Circle in Billerica in 2002, and who was subsequently hired as Building Supervisor. The Board's auditors had also raised questions regarding issues related to the renovations, and the Board again made full and immediate disclosure to the appropriate agencies as noted above.

The renovations of the Board's offices also became the subject of a report by the Office of the Inspector General this past April. While the Board has vigorously contested the legal and factual basis for the Inspector General's conclusions in this matter, the Board was nevertheless sufficiently concerned regarding the perceptions created by Mr. MacDonald's role in the renovations, and by his subsequent role in the building operations. The Board is reviewing all existing vendor service contracts and will determine whether to re-bid in these areas, or to outsource the building management in its entirety.

### **SETTLEMENT WITH GOLDMAN SACHS**

By letter of October 11, 2006, the Board reported to PERAC that it had settled a demand made upon J. Aron & Company and their affiliates, including Goldman Sachs & Co., for the amount of One Million (\$1,000,000.00) Dollars. The settlement arose from the Board's claim relating to commission payments made to undisclosed third parties which were generated by trades made with Cambridge Financial Management ("CFM.") CFM's losses are the subject of litigation now pending in the matter of *Middlesex Retirement System v. Boston Safe Deposit and Trust Co., et al.*, commonly referred to as the "Mellon litigation."

The Board learned of these commission payments as a result of investigative findings made by the Inspector General and the Board's claim was substantially based upon those findings. Prior to hiring CFM, the Board required CFM to disclose in writing, under the pains and penalties of perjury, whether it had any third party relationships. The principal of CFM swore that it did not. While the Inspector General, again using his statutory powers, was able to uncover these third party payments, the Board knew nothing about them. Moreover, the Board's lack of knowledge is buttressed by the payment of \$1,000,000 to the Middlesex Retirement System by Goldman Sachs. It should be clear that this payment would not have been made if there was any credible evidence that the Board was aware of the role of the third parties who profited by CFM's trading.

The Board is also currently seeking to recoup the losses sustained in the CFM account as a result of CFM's fraud, which we have previously reported to you. The Board agrees with PERAC's ultimate determination, expressed in its Interim Report of October, 2005, that, "the fact that [CFM] perpetrated the fraud in account management and in reporting of prices is the real source of the loss that the MRB incurred."

As do all self-investing retirement systems, the Board hires experts, like Mellon, to provide expertise in the investment process. CFM's losses went undetected because one of the Board's experts failed to perform as they had promised. PERAC's Interim Report determined that, "The MRB did not act in an unreasonable manner in relying on the Mellon custodian reports and the Russell Mellon performance reports in assessing whether the account was on a net basis, achieving gains or losses." PERAC's findings, arrived at after a thorough and unbiased review, convincingly dispute Mr. Sullivan's assertion of alleged "breaches" by the Board.

### **REVIEW OF THE SYSTEM'S INVESTMENT PROGRAM**

On February 14, 2006, the Board met with officials of the Pension Reserve Investment Management Board (PRIM), overseers of the \$43 billion Pension Reserve Investment Trust Fund (PRIT). The PRIT Fund consists of the retirement assets of the State and State Teachers' Retirement System. Under the law, municipal, county and regional retirement boards can choose to invest all or part of their system's assets through the PRIT Fund. Over the past year, the Board has voted to allocate \$10 million to the PRIT Real Estate Fund, \$32 million to the PRIT Absolute Return Fund, and most recently, \$20 million to the PRIT Emerging Markets Fund.

The Board is mindful of the System's statutory funding requirements, and keenly aware of the financial pressures brought to bear on the member units through substantial increases in retirement assessments, which are necessary to fulfill the retirement promises made to our public employees. The Board has been fully engaged with several entities and member units regarding these critical funding issues.

On November 10, 2006, we met with representatives of PERAC to discuss these and other matters relating to the issues presented above. After careful consideration, the Board now believes that a temporary transfer of the management of substantially all of the System's assets to PRIM may be in the best interests of the Middlesex Retirement System, and would allow us to focus on the important issues before the Board, and would save the System substantial costs associated with further litigation.

We would welcome Council member's input on this issue as early as possible, as a transfer by January 1, 2007 would be optimum for performance reporting and record keeping purposes. Please e-mail, call, or write directly to us with comments regarding the transfer of the management of the System's assets to PRIM.

As always, the Council's support is greatly appreciated, especially during these difficult times.

Thank you.

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THIS STORY HAS BEEN FORMATTED FOR EASY PRINTING

## State may remove pension fund board Members rigged bids, report says

**The Boston Globe**

By Steve Bailey, Globe Staff | April 28, 2006

BILLERICA -- The state is considering removing the entire board of the Middlesex Retirement System in the wake of an investigation by the state's inspector general that found the board rigged construction bids in favor of a contractor friendly with board members.

Removal of the board, which runs one of Massachusetts' largest pension funds, would be unprecedented.

The inspector general's report, obtained by The Globe, chronicles the use of "fabricated" bids to ensure that the reconstruction of the Middlesex headquarters in Billerica went to a Westford contractor close to two board members. "The board's actions in this matter represent a profound breach of public trust and a misuse of beneficiaries' money," Inspector General Gregory W. Sullivan said in an 11-page letter to the Public Employee Retirement Administration Commission, or PERAC, which oversees the state's 106 public pension systems.

Middlesex chairman Thomas F. Gibson called Sullivan's report "rife with speculation, innuendo and little fact." In a statement, Gibson added: "It is clear that the inspector general has absolutely no evidence that any [Middlesex] board member violated any regulation or falsified any documents."

The inspector general's move follows a string of embarrassing disclosures at the Middlesex system, which has about \$660 million in assets and about 14,000 active and retired members in 54 cities and towns. In 2003, for instance, the system lost \$37 million, or 7 percent of its value, in the currency markets.

In a closed-door session Wednesday, PERAC voted to install an overseer for the Middlesex system and hold a hearing next month on whether to remove the board. Removal of the board could set the stage for the pension regulator to attempt to force Middlesex to shift its assets into the state's \$42 billion pension fund, a move favored by the inspector general.

The inspector general said his staff "uncovered falsified documents apparently created to convey the appearance that a valid competitive selection process had been conducted when, in fact, no competition existed."

In addition, Sullivan charged that the original contractor for the roughly \$600,000 job was fired three years ago because of its "lack of accommodation towards certain subcontractors favored" by Middlesex board member Lawrence P. Driscoll, a retired Tewksbury firefighter.

John C. MacDonald, a longtime friend of Driscoll and another board member, John H. Burke Sr., a former Billerica firefighter, was hired for the job instead.

The inspector general said MacDonald acknowledged in an interview that he had been given the bids of the other contractors before he submitted his own, allowing him to come up with the lowest price. "Mr. MacDonald knew the number he had to beat," Sullivan wrote. "Such insider knowledge breaks the cardinal rule of competitive procurement."

Driscoll and Burke declined to comment. MacDonald did not return two calls.

In addition to the headquarters contract, the report also focuses on a property insurance contract that went to a Driscoll in-law. According to the Middlesex retirement board minutes, four insurance firms were solicited for bids, the inspector general's report says. Only the one that employs Driscoll's family member responded, the inspector general said. "The three [other] firms did not respond for a simple reason -- they were never contacted by anyone from the Middlesex Retirement System," Sullivan wrote.

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Gibson, in the statement, said Middlesex was exempted by the Legislature from the state's competitive bidding requirements for this project. "The only breach in the public trust that has occurred here is the inspector general's continued attempts to assail the actions of the [Middlesex] board members," Gibson said.

The questions about the headquarters renovations were first raised in an independent audit that PERAC ordered after the huge currency loss three years ago. The agency took that audit to the Massachusetts attorney general's office, which decided not to pursue it, said Joseph E. Connarton, PERAC's executive director. Connarton then turned it over to the inspector general.

The attorney general's office says it passed on the case because pension systems are not subject to the public bidding law -- the same point Middlesex makes. Stephanie Lovell, the first assistant attorney general, said lawyers there found "no evidence of criminal self-dealing." She said, however, the office remains open to the case if new evidence develops.

Regardless, the inspector general in its report said: "No exemption from any law gives license to create false documents designed to give the impression of a competitive process."

Relations are strained between the Middlesex board and the inspector general's office. In January, the inspector general reported on a secret fee-splitting arrangement that allegedly cost the Middlesex and MBTA pension systems \$2.8 million over the three years that the late James T. Kneafsey -- the Wellesley money manager who oversaw the \$37 million Middlesex lost -- worked for the fund. Middlesex called those allegations "baseless." The attorney general's office has also declined to pursue that case.

Middlesex's performance has been hurt by the Kneafsey losses. Over the last five years, Middlesex has an annual return of 2.93 percent compared to 4.25 percent for the state pension fund. Middlesex was up 11.02 percent last year; the state fund was up 14.45 percent. Middlesex's longtime chairman, James Fahey Jr., retired in 2004.

PERAC, created in 1996, has historically been a weak regulator. But it is now campaigning in the Legislature for changes that would strengthen its oversight of local pension funds -- changes that have met stiff resistance from the local systems, which are dominated by police and firefighters. The proposed changes range from investment practices to enforcement to conflict of interest.

"The IG findings," said former attorney general Scott Harshbarger, who headed a panel that recommended the reforms, "reflect a fundamental disregard by the board of its fiduciary obligations to the retirees of Middlesex. This is exactly the kind of abuse that underlines the need for the governance reforms we recommended."

Said Thomas Trimarco, the state's secretary of administration and finance, of the Middlesex allegations: "I have a concern that this is the tip of an iceberg. There have been long-standing suspicions of self-dealing there. The facts in this matter are truly outrageous. It is such an arrogant abuse of power, and is such a disdain for fiduciary obligation, that the natural question is what else are they doing over there?"

Steve Bailey can be reached at [bailey@globe.com](mailto:bailey@globe.com). ■

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INSPECTOR GENERAL

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ROOM 1311  
BOSTON, MA 02108  
TEL: (617) 727-6140  
FAX: (617) 727-2334

January 6, 2006

Joseph E. Connarton, Executive Director  
Public Employee Retirement Administration Commission  
5 Middlesex Avenue, 3<sup>rd</sup> floor  
Somerville, MA 02145

Dear Mr. Connarton,

It has come to my attention that the Public Employee Retirement Administration Commission is on the verge of approving its Final Investigative Report on the Middlesex Retirement System and Cambridge Financial Management.

I also understand that the commissioners plan to vote later this month on whether to lift PERAC's temporary order restricting the Middlesex Retirement System's investment activities. PERAC imposed the temporary order in 2003 in response to the \$37 million loss Middlesex suffered at the hands of Cambridge Financial Management, one of its financial managers.

I appreciate the assistance and cooperation of PERAC and its entire staff during the Inspector General's investigation of this matter. I am writing this letter to update you on my office's investigation and to urge you to keep the temporary order in place until the Middlesex Retirement System fully answers all questions about Cambridge Financial Management's investment activity and the questionable fee arrangement that siphoned \$2.8 million from public employee pension funds for the benefit of two men, Ronald A. Whitham and Thomas F. Kelly, who had little or no role in the company's investments.

As you know, the loss accrued over a three year period, starting in the spring of 2000, and went undetected until Cambridge Financial Management's principal James Kneafsey died suddenly on April 21, 2003. The Middlesex Retirement System, PERAC and Wainwright Investment Counsel were all receiving monthly trading reports that contained numerous clues that Kneafsey entered a trading frenzy as he attempted to recoup his losses. The reports, as your own investigation has found, were doctored to hide the extent of the losses but they clearly showed that Kneafsey's trades violated

both his contract with the Middlesex Retirement System and PERAC regulations.

These huge losses, amounting to about 7 percent of the fund's assets, came at a time when Cambridge Financial Management's president was ostensibly providing "currency overlay" – that is, investing in foreign currency futures to protect Middlesex Retirement System's international investments from losing value when the U.S. dollar rose. Instead, within months of being hired by Middlesex Retirement System as an investment manager, Kneafsey began engaging in the highly speculative and risky practice of writing options on foreign currencies.

As your staff has thoroughly documented, Kneafsey's actions were both wildly at odds with a currency overlay program and detectable. Unfortunately for contributors to and beneficiaries of the Middlesex Retirement System, officials of the Middlesex Retirement System, Wainwright Investment Counsel and PERAC failed to detect Kneafsey's errant trading until after his death.

The clearest contemporaneous indication that Kneafsey had strayed dramatically from his contract with Middlesex Retirement System was the steady, pronounced escalation in trading. Kneafsey started running a conventional currency overlay program in September 1999 for the Middlesex Retirement System. Beginning in early 2000, Kneafsey started writing currency options, essentially betting on the future value of foreign currencies. Once Kneafsey began trading with Goldman Sachs in November 2000, the pace of trading escalated significantly. Kneafsey's actions had veered from providing the Middlesex Retirement System with a form of insurance against swings in the value of foreign currencies into investing directly in the high-risk and highly leveraged foreign exchange markets.

Perhaps in excess of two-thirds of the Middlesex Retirement System's \$37 million loss is attributable to transaction costs associated with the frenzied trading by Cambridge Financial Management. Kneafsey was originally given \$4 million by the Middlesex Retirement System board to set up and run the currency overlay program. The losses and transaction costs exceeded this amount many times over but due to poor oversight, Kneafsey was able to continue the speculative trading in the Middlesex Retirement System's account. Because the Middlesex Retirement System account received a premium each time Kneafsey wrote a futures option, the more trades he initiated, the more premiums came in. These premiums – and the failure to recognize the significance of the reports showing Kneafsey's frenetic trading – helped disguise the mounting losses and provided the cash flow to allow Kneafsey to continue trading.

Kneafsey was also trading for another institutional investor, the Massachusetts Bay Transportation Authority Retirement Fund. When Kneafsey died, MBTA Retirement Fund officials discovered their fund also had lost a large amount of money, more than the Middlesex Retirement System, as a result of Kneafsey's speculation. While many of the causes and people responsible for the losses borne by the Middlesex Retirement System and the MBTA Retirement Fund are identical, the MBTA Retirement Fund is not a governmental entity. As a result, the Inspector General did not review that fund's

dealings with Cambridge Financial Management.

The Inspector General's review has focused on two local companies that received what appear to be inordinately large benefits as a result of Kneafsey's improper trading. In fact, each of the companies performed little or no work related to the Middlesex Retirement System account yet they received much more money as a result of the trades than Kneafsey himself did as an investment manager.

More than \$1.9 million of Middlesex Retirement System funds went to a one-person firm operated by a South Shore man, Ronald A. Whitham, from his Weymouth home. This man's firm, RAW Inc., received another \$935,860 as a result of Kneafsey's trades on behalf of the MBTA Retirement Fund.

The \$2.8 million that Goldman Sachs paid RAW Inc. between November 2000 and April 2003 represent commissions on trades made by Kneafsey with Goldman Sachs. Whitham and Goldman Sachs signed a contract in February 2000 under which Whitham's firm, as the so-called "introducing broker," would receive \$50 for every \$1 million in options traded through Goldman Sachs. This "introducing broker" arrangement is rare, according to contemporaneous internal Goldman Sachs e-mails. The firm agreed to it because all the costs were charged to the Middlesex Retirement System and MBTA Retirement Fund accounts managed by Cambridge Financial Management and therefore did not affect Goldman Sachs's profits. Goldman Sachs built RAW Inc.'s fees into the price of the options rather than itemizing the cost separately. While Goldman Sachs wrote the check to RAW Inc., the entire commission cost was levied against the two pension funds.

In an interview earlier this year with members of the Inspector General's staff, Whitham acknowledged that he set up RAW Inc. in July 1999 to receive commissions on currency futures trades and that Kneafsey was his only customer conducting these trades. More than 95 percent of the deposits into RAW Inc.'s bank account were from Goldman Sachs for commissions on Kneafsey's trades.

During the period he received \$2.8 million from Goldman Sachs into his RAW Inc. account, Whitham paid out almost exactly half that amount – \$1.4 million – to another local firm, CanAm Consultants Inc. The first \$10,000 payment was made shortly before Whitham started collecting fees from Goldman Sachs. The payments stopped when Kneafsey died.

Based in Boston, CanAm Consultants provides so-called "third-party marketing" services for businesses, including investment companies and venture capital firms seeking to raise capital from pension funds. Thomas F. Kelly is the principal officer of CanAm Consultants, founded in 1988.

PERAC regulations require investment managers to disclose any third-party marketing arrangements or commission agreements. Cambridge Financial Management's disclosure form states it did not have any such contracts.

Interviews with and documents from Goldman Sachs underline the highly unusual nature of the arrangements between Cambridge Financial Management and RAW Inc. First, the fees paid to RAW Inc. are uncharacteristically large. An internal email in 2002 from a Goldman Sachs vice-president to the sales representative handling Cambridge Financial Management described the commission rate as "pretty high" for options brokerage. The sales representative responded, "yes, I know it is ridiculous but then again it doesn't effect [sic] us."

In an interview, the sales representative said that during the several years he worked at Goldman Sachs, he knew of only one other account which generated fees for an "introducing broker." Such arrangements are very rare, he said.

The circumstances that led to Whitham's becoming the introducing broker were even more peculiar. According to Goldman Sachs, Whitham did not do any "introducing" at all. The Goldman Sachs sales representative, Dan Silber, saw Kneafsey's name in a business directory and cold-called him. "I was looking through Nelson's directory of money managers," Silber said in an interview. Silber said, "I called Jim directly."

Once Silber made contact, Kneafsey expressed interest in trading with Goldman Sachs but he imposed one condition: Goldman Sachs must establish an "introducing broker" relationship with Whitham as a pre-condition of doing business. This pre-requisite was referenced in contemporaneous internal emails as well as interviews after Kneafsey's death with Goldman Sachs personnel. In a Sept. 28, 1999 email, the institutional sales representative wrote to a colleague, "a prospect I am entertaining (Cambridge Financial Mgmt.) said it can only deal with us if we 'pay' their introducing broker a fee for every trade we do...the client not only knows about the arrangement (disclosure) but cannot deal with us unless we have this arrangement." (Parentheses in original.) As a result, in February 2000, Goldman Sachs signed a finder's fee agreement with Whitham, adding \$50 onto Cambridge Financial Management's costs for every \$1 million in options transacted and passing that amount on to Whitham.

Whitham, in an interview, contradicted the Goldman Sachs account of how Kneafsey began doing business with Goldman Sachs. Whitham claimed that he initiated contact with Goldman Sachs and a number of other foreign exchange firms in late 1999 when Kneafsey got interested in trading unlisted options. "I literally knocked on doors in banks across the country," Whitham told the Inspector General. "I interviewed a number of banks."

This claim is unconvincing. Whitham offered no evidence that he had ever contacted any other trading firm on Kneafsey's behalf. He could not name any individual at any firm he spoke to and he had difficulty even coming up with the names of trading firms he claimed to have contacted.

Regarding the size of his fee, Whitham said he had no idea if the \$50 per \$1 million rate was higher than, lower than, or in line with industry practices. This claim is somewhat

plausible given that Whitham had virtually no experience with this type of trading and no other customers. By his own account, Whitham spent most of the 1990s away from the securities business, working as a basketball coach and trying to build up a basketball clinic business. However, Whitham was not completely naïve about these matters. He had previously signed "introducing broker" deals with two other firms – Saul Stone & Co. and Fleet Bank – covering Kneafsey's trades.

The arrangements for the Saul Stone trades mirror those of the Goldman Sachs trades in certain ways. Saul Stone paid the introducing broker fees to a company called Alaric Corporation, a one-person firm Whitham set up in 1996. As he did later with RAW Inc., Whitham wrote checks from Alaric's account to Kelly.

In the interview, Whitham was questioned about his payments to Kelly's firm. Whitham denied that Kelly was being paid as part of an arrangement to share the fees generated by Kneafsey's frenetic trading with Goldman Sachs on the Middlesex Retirement System and MBTA Retirement Fund accounts. Whitham claimed that he paid Kelly to get certain investment firms to steer their stock brokerage trades through another company, Source Capital, where Whitham had his securities license and would receive commissions on the stock trades. Whitham said the payments were outlined in finder's fee agreements between Whitham and Kelly. Each finder's fee agreement called for Whitham to pay Kelly a flat fee of between \$50,000 and \$150,000, but he often paid Kelly more than the contract required, Whitham said.

"I overpaid him basically in an attempt to entice him to bring me more (business)," Whitham said in his interview. "I was anticipating and hoping that the more money I could get to CanAm, the more he'd be willing to help me."

Whitham estimated he paid Kelly \$500,000. (The actual figure is \$1.4 million over a period of about 32 months.) He said Kelly generated very little brokerage business for him – far less than he paid Kelly. Nevertheless, he kept paying Kelly steadily and handsomely right through April 2003 and Kneafsey's death.

"I know it looks like I'm paying him for the Cambridge situation (but) I was paying him for what he could do in the future," Whitham told the Inspector General.

Whitham said he is not friends with Kelly. He said they first met when Whitham worked at a tiny Boston brokerage firm called the William G. Manning Co. in the late 1980s and early 1990s. Whitham said they had been out of touch for years until Whitham got back in the business through Kneafsey. Even during the 2000 to 2003 period when he was paying Kelly huge fees purportedly to drum up stock brokerage business, Whitham said he rarely talked to Kelly – once a month at the most. Mobile phone records show that Whitham telephoned Kelly about once a month, including a call to his home the day Kneafsey died.

Whitham's contention that his \$1.4 million in payments to Kelly is unrelated to Cambridge Financial Management is implausible. RAW Inc.'s checks to Kelly began just

before Kneafsey started trading with Goldman Sachs, they stopped when Whitham's fees from Goldman Sachs stopped, and the amount totalled almost exactly half the fees paid by Goldman Sachs. Whitham acknowledged that the amounts on the checks he wrote to Kelly bore no relation to the volume of brokerage business Kelly generated for him. By contrast, the amounts roughly tracked the Goldman Sachs fees – going up as Whitham's fee income went up.

When the Middlesex Retirement System board voted to hire Cambridge Financial Management in 1998, Richard Zaccaro was a top official at Wainwright Investment Counsel LLC, the investment consultant for the Middlesex Retirement System and the outside entity that was under contract to vet investment managers, ensure compliance with their contracts and guidelines, and monitor investment performance. Middlesex Retirement System meeting minutes show that Zaccaro was personally involved in the process that resulted in the Middlesex Retirement System board hiring Cambridge Financial Management.

In response to questions from the Inspector General, Whitham described his relationship to Zaccaro. He said he first met Zaccaro in the 1980s and 1990s, the period when Whitham was working at the William G. Manning Co. and the same period when he met Kelly. Whitham said he occasionally met Zaccaro at a fundraiser. He said Zaccaro's son also attended one of Whitham's basketball programs, which Whitham was operating in the mid- to late-1990s.

Kelly, Kneafsey, Zaccaro, and William G. Manning, whose company Whitham worked for, all have something in common – past ties to the state treasurer's office during the tenure of Robert Q. Crane. Kelly and Zaccaro were top aides to Treasurer Crane. Treasurer Crane chose Kneafsey to manage some state pension money. At the end of his last term, Treasurer Crane directed state pension investments to several firms represented by Manning, a long-time friend from Brighton, or Manning's son.

Kelly also had a relationship with Kneafsey during the period when Cambridge Financial Management was trading with Goldman Sachs. In a July 18, 2001 letter provided by Wainwright Investment Counsel in response to a subpoena, Kelly wrote, "I am sorry you were unable to join us for the Foreign Currency Overlay Seminar at Jimmy's on June 27<sup>th</sup>." The seminar featured Kneafsey discussing the benefits of currency overlay and the letter summarizes why pension funds might need this type of investment. The document, which appears to be a form letter, ends by telling the recipient to call Kelly with any questions about Cambridge Financial Management.

Middlesex Retirement System officials were apparently aware that Kelly may have had involvement in the investment that cost the system's beneficiaries \$37 million. In a June 18, 2003 facsimile provided in response to a subpoena, a public relations consultant working for the fund sent a copy of a Globe column on the Cambridge Financial Management scandal to Middlesex Retirement System's then-chairman. On the cover page, the public relations consultant wrote, "It is good that there is no mention of Tom Kelly."

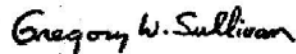


To this point, Middlesex Retirement System officials have not been asked formally about their dealings with Kelly, if any. In late 2003, PERAC asked Middlesex Retirement System officials about RAW Inc. and Whitham. Middlesex Retirement System's response was that no one had any contact with or about RAW Inc. Regarding Whitham, the response was, "Not enough information is given with regard to the question above to identify this individual." However, in a chronology Middlesex Retirement System officials prepared for PERAC, they identify Whitham as "a friend of Kneafsey's."

PERAC's draft of the final report makes clear that it is unsatisfied with Whitham's explanation of his arrangement with Cambridge Financial Management. The account he gave the Inspector General about why he paid Kelly \$1.4 million strains believability. Middlesex Retirement System officials have not been forthcoming about what they knew about Kelly and Whitham's activities nor have they addressed their own failures to properly oversee Cambridge Financial Management. Middlesex Retirement System officials have excused and overlooked the deficient performance of their investment consultant, Wainwright Investment Counsel. In addition, to date no one has questioned Kelly about why he received so much money from Whitham.

I strongly recommend that PERAC keep the temporary order in place until Middlesex Retirement System officials thoroughly explain Whitham's and Kelly's roles in this scandal. If the Middlesex Retirement System is unable – or unwilling – to explain why these two men made money while the contributors to and beneficiaries of the pension fund lost tens of millions of dollars, PERAC should use all its authority to force the Middlesex Retirement System to move its assets to the Pension Reserves Investment Trust.

Sincerely,



Gregory W. Sullivan  
Inspector General



