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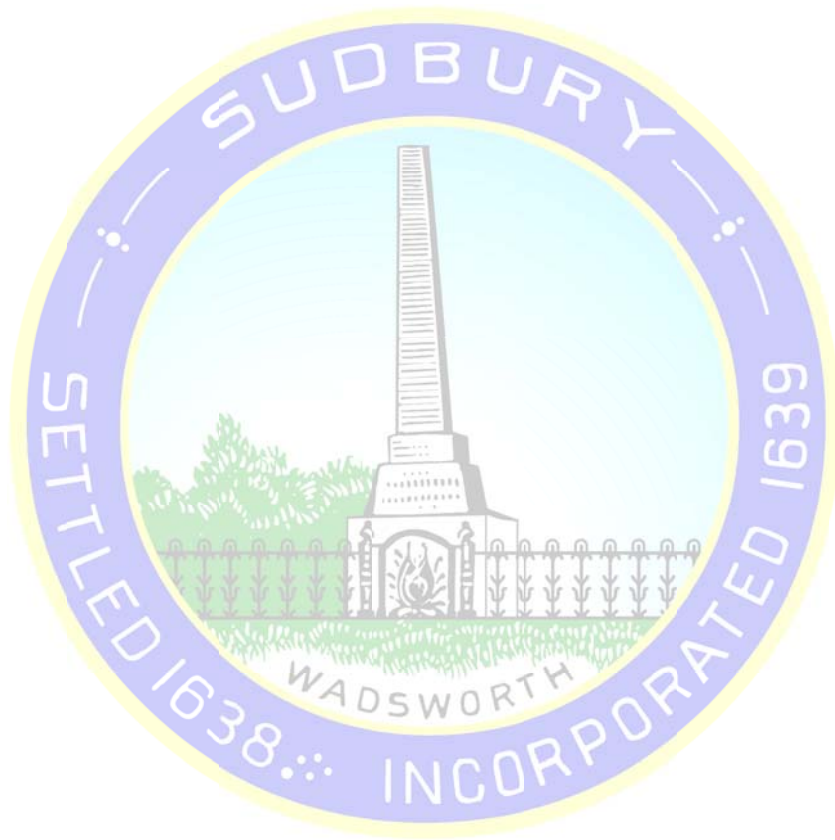
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# Section One

## TRANSMITTAL AND SUMMARY OF LEVEL SERVICES BUDGET





# Town of Sudbury

## Town Manager's Office

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278 Old Sudbury Road  
Sudbury, MA 01776  
978-639-3381

Maureen G. Valente, Town Manager

<http://www.town.sudbury.ma.us>

January 31, 2011

The Honorable Board of Selectmen, Finance Committee, Sudbury Public School Committee and L-S Regional School Committee:

I hereby submit to you the consolidated **FY12 Level Services Budget Proposal for Fiscal Year 2012**. This proposal contains the amounts requested by each of the three major cost centers following the guidelines of the Sudbury Finance Committee using assumed cost drivers that were previously reviewed during a joint financial forum held in the fall, plus the other amounts required by law or bylaw to be included in the overall financial plan for the fiscal year 2012, which begins July 1, 2011. The Finance Committee asked, in their letter dated October 29, 2010, that the first of two budget alternatives be developed and submitted to the Town's Finance Director by January 14, 2011. Herein this first budget is referred to as the "Level Services" budget and is prepared assuming certain percent increases over the FY11 Appropriated budget (including pension and insurance costs) net of direct offsets.

This budget document provides a consolidated view in response to the FinCom's letter, the other financial obligations of the Town (such as debt payments, Assessor's overlay account, state offsets, and the payments the Town makes for students to attend other district high schools). We have also included an overall budget summary showing the bottom line once all budget proposals are applied to expected revenues. It is important to note that expected revenues for FY12 will likely be adjusted one or more times heading into the Annual Town Meeting as more information regarding the State's FY12 budget situation and local economic conditions come to light.

***This marks our second year of separate submissions for a Level Services budget (aka "override budget") from the revenue constrained (aka non-override) budget. The latter budgets will not be submitted by the cost centers until February 2011 on or around the Finance Committee's budget hearings. Until those budgets are received, we are submitting this abbreviated document with just one proposed level of budgets for Town, Schools and Other Operations, as called for by the Sudbury bylaws.***

### **FY12 Level Services Budget Request Summary**

On page 6 is the summary of all the amounts to be raised for FY2012, as of the writing of this transmittal letter, under the Level Services Budget Guidelines. We caution all readers that the revenue figures used in this summary are best estimates, as we do not know with any certainty the amounts for state aid, or local receipts at this time. Therefore our revenue level for the coming year is subject to change as more information is received and updated.

The gap between available revenues and expenses is projected to be \$1,288,687 when using the **Level Services Budget requests**. That means that additional revenues of \$1.3 million would be needed to sustain that level of spending. To remind you of the **revenue** estimates that we are using for the FY12 budget:

1. We are currently projecting an overall 5% decrease in state aid for the Town of Sudbury/Sudbury Public Schools for FY12, which translates to a reduction of \$277,000. For L-S we are also assuming a 5% reduction in state aid, which is included as part of the L-S offsets and reapportionment for our assessment. We are aware that Governor Patrick announced different state aid amounts when he addressed the Massachusetts Municipal Association on January 21. However, we feel it prudent to continue to use the 5% decrease assumption until we have better information on how the state legislature might receive and act on those proposals.
2. We are currently projecting local receipts to remain level with FY11 budget, as the three primary categories of these revenues – motor vehicle excise, permits, and penalties and interest – are showing signs recent months that the local economy is slowly improving.

We have not included an expanded section on revenues at this time, as more attention will be given to updating that information in February and March. When the revenue constrained, aka “no override” budget submissions are presented in February, the Town staff will compile and submit updates to this budget package including information you customarily receive for consideration in the Annual Town Warrant.

We plan to put this entire budget document on the Town’s web site as soon as we can, with links to the SPS and L-S web site for their budget submissions.

Sincerely

*Maureen G. Valente*

Maureen G. Valente  
Town Manager

### Summary of FY09-FY12 Budget Data

EXPENDITURES	FY09 Actual	FY10 Actual	FY11 Appropriated	FY12 Level Services
LS Gross Assessment	16,471,854	16,854,852	16,999,542	18,334,852
LS Offsets/Re-apportionments	(3,255,278)	(3,192,298)	(2,640,344)	(2,642,792)
LS Employee Benefits Assessment	3,117,966	3,142,491	3,218,181	3,317,351
LSRHS NET (Operating Assessment)	16,334,542	16,805,045	17,577,379	19,009,411
SPS Gross Expenses	26,331,604	27,815,697	30,685,207	31,222,963
SPS Offsets	-	-	(2,480,863)	(2,506,335)
SPS Employee Benefits	6,700,568	6,204,274	6,450,128	6,800,075
SPS NET	33,032,172	34,019,971	34,654,472	35,516,703
Minuteman Regional Assessment	237,788	298,098	228,794	343,816
Other Regional School Assessments	43,212	-	-	-
<b>Total: Schools</b>	<b>49,647,714</b>	<b>51,123,114</b>	<b>52,460,645</b>	<b>54,869,930</b>
General Government	2,117,424	2,207,011	2,284,281	2,353,009
Public Safety	6,330,016	6,297,069	6,767,557	6,860,376
Public Works	3,406,588	3,364,252	3,299,349	3,370,115
Human Services	515,673	520,208	538,651	533,166
Culture & Recreation	1,080,329	1,112,286	1,149,824	1,168,411
Unclassified & Transfer Accounts	113,643	106,619	434,505	416,439
Town Employee Benefits	4,153,667	3,964,802	4,224,185	4,556,575
subtotal, town services	17,717,340	17,572,248	18,698,352	19,258,091
Town Operating Offsets	(230,342)	(381,600)	(468,369)	(522,969)
<b>Total: Town Departments</b>	<b>17,486,998</b>	<b>17,190,648</b>	<b>18,229,983</b>	<b>18,735,122</b>
Capital Planning Committee	513,042	523,383	529,054	547,678
<b>Total: Capital Budget</b>	<b>513,042</b>	<b>523,383</b>	<b>529,054</b>	<b>547,678</b>
<b>Subtotal: Operating Budget</b>	<b>67,647,754</b>	<b>68,837,145</b>	<b>71,219,682</b>	<b>74,152,730</b>
Town Debt Service	4,347,060	4,269,224	4,180,354	3,883,860
LSRHS (Debt Assessment)	2,394,071	2,298,949	2,237,147	2,193,072
<b>Total: Debt Budget</b>	<b>6,741,131</b>	<b>6,568,173</b>	<b>6,417,501</b>	<b>6,076,932</b>
Enterprise Fund Expenditures	702,292	825,257	982,802	1,093,580
<b>Total: Other</b>	<b>702,292</b>	<b>825,257</b>	<b>982,802</b>	<b>1,093,580</b>
Other Charges to be raised	983,524	730,246	744,548	750,000
<b>Total: To Be Raised</b>	<b>76,074,701</b>	<b>76,960,820</b>	<b>79,364,533</b>	<b>82,073,242</b>

RECEIPTS				
State Aid (Cherry Sheet)	5,650,528	5,580,961	5,537,686	5,260,802
SBAB School Debt Reimbursement	1,702,597	1,702,597	1,702,597	1,702,597
Local Receipts	4,287,194	3,734,780	3,652,860	3,657,581
Free Cash	294,110	-	-	-
Retirement Trust Fund	25,000	-	-	-
Abatement Surplus	421,000	321,000	-	-
Prior Year Articles/Recoveries	26,320	-	-	-
Enterprise Funds	774,274	1,026,461	1,012,397	1,144,730
<b>Total: State &amp; Local Receipts</b>	<b>13,181,023</b>	<b>12,365,799</b>	<b>11,905,540</b>	<b>11,765,710</b>
<b>Tax Levy</b>	<b>63,263,124</b>	<b>65,529,152</b>	<b>67,418,506</b>	<b>69,018,845</b>
<b>Total: Revenue</b>	<b>76,444,147</b>	<b>77,894,951</b>	<b>79,324,046</b>	<b>80,784,555</b>

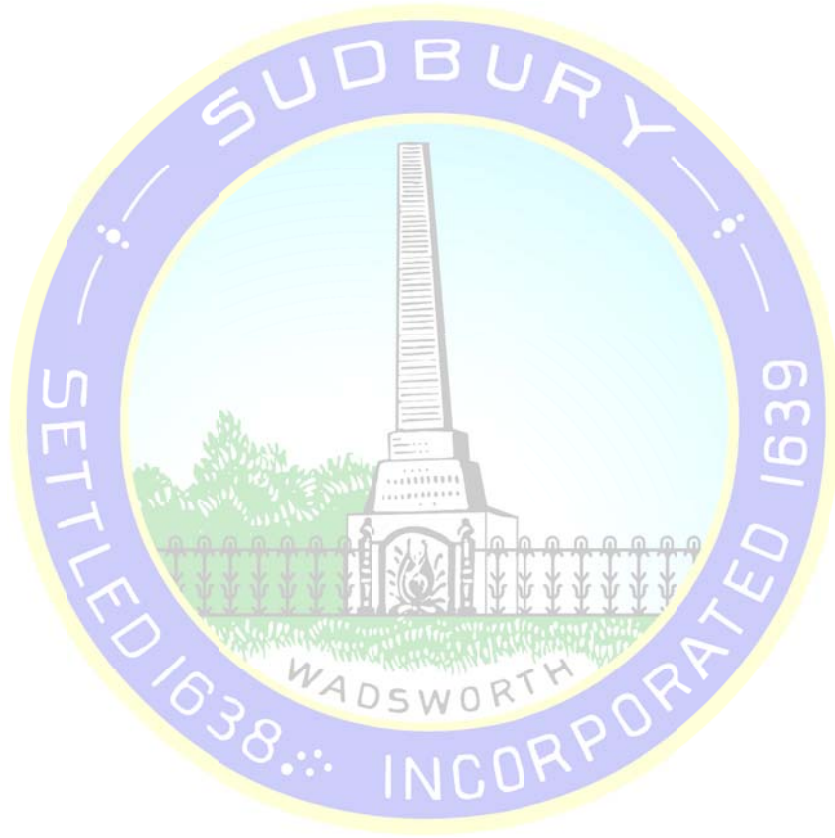
  

<b>UNDER/ (OVER)</b>	<b>369,446</b>	<b>934,131</b>	<b>(40,487)</b>	<b>(1,288,687)</b>
	-	-	-	-

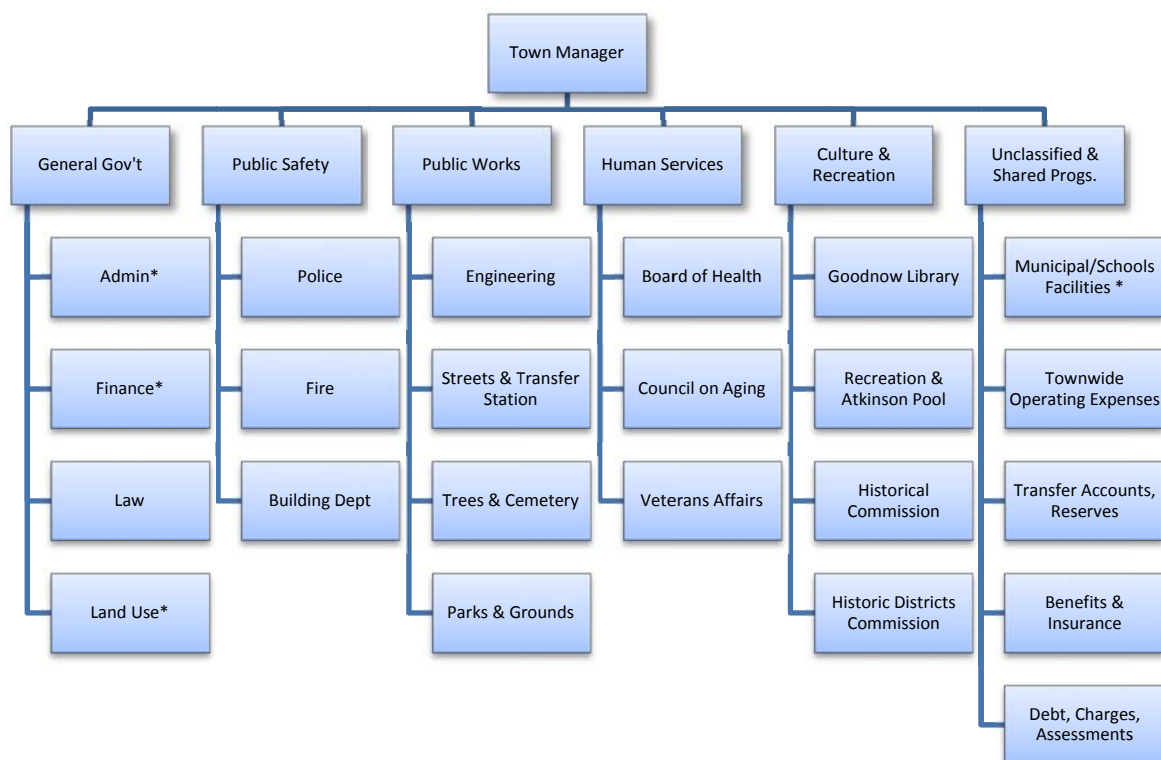
Note: prior year actual expenditures do not include carry-forward amounts spent out of the normal budget cycle. Consequently, expenses may appear understated compared to budget and current year results.

## Section Two

# TOWN OPERATING DEPARTMENTS



## Budget Accounts under the Direction of the Town Manager



\*Admin budgets include:

- Selectmen/Town Manager
- ATM/Personnel
- Town Clerk & Registrars

\*Finance budgets include:

- Finance Committee
- Accounting
- Assessors
- Treasurer/Collector
- Information Systems

\*Land Use budgets include:

- Conservation
- Planning & Board of Appeals



## TOWN MANAGER'S BUDGET MESSAGE

### **Town Manager's FY12 Level Services Budget Request**

The **Town Manager's Level Services Request** is 2.8% or \$505,139 over the FY11 Appropriated Budget for Town Departments. The budget projects a .61% growth in wages 7.87% growth in employee benefits and insurances (excluding offsets) and 3.04% growth in all other expenses net of direct offsets. The wage and benefits budget numbers are very close to the parameters set forth by the Finance Committee for level service budget requests and are mostly attributable to the successful collective bargaining achieved between the Town and SPS and our employees. Even with the federally mandated changes in health insurance adding nearly 2% to the increase in health insurance costs, and other entities seeing higher than 10% growth in this area, our collective bargaining agreements will continue to hold down Town costs in this area. The Town also benefits from the retirement of several long serving department heads, as their successors are starting at lower salary points.

I agree with the Finance Committee that, even if it proves unlikely to fund this Level Services budget level, it still deserves serious consideration because it prevents further deterioration in public safety, public health and quality of life services, which residents depend on. It is important to create a record of what we believe are realistic and prudent levels of staffing and expenses needed to provide the services that we have been told by residents they expect. Here are some of the highlights of the FY12 Level Services budget request.

- A. **General Government:** Existing staff positions would be maintained and more funds would be allocated to the Technology department for replacement of equipment and for our on-going GIS efforts. An increase would be made in the area of professional development so that our employees could continue to upgrade their knowledge and skills in key areas. At a time when we are looking to staff to know more about being "green" and dealing with energy efficiencies, being able to develop programs to address the many environmental requirements and programs, to learn about and comply with new mandated laws from the state and federal government, to explore regionalization and consolidation, to develop new performance measurement and other management tools and ideas, we are cutting back on the opportunities for staff to attend conferences, training opportunities, and meet with peers to collaboratively solve problems and develop alternatives.
- B. **Public Safety:** All police and fire department vacancies would be filled, police overtime would be restored so that 60-65% of the vacant shifts could be backfilled barring unforeseen long-term wellness issues, and four new firefighters would be hired with paramedic level skills. Annually, five vehicles would be purchased for Police Operations – four cruisers and one unmarked vehicle. The four cruisers would replace the four which by that time would have high mileage and start needing frequent repairs, and the one unmarked would allow an older unmarked to be "passed down" to the DPW or building inspector's department.
- C. **Public Works Department:** The roadwork account would be adequately funded for all the safety and protection items that otherwise keep being deferred, such as replacing guardrails, repairing walkways, replacing or rehabilitating failing culverts and drainage structures, and repairing catch basins. Funds for removal of dead and dying trees would be restored to a level that allows for catching up on several years of backlog, and a small amount dedicated to replanting our street trees. In addition, funds would be restored so that the grounds of the SPS and Town buildings are tended to at least once each year by landscaping contractors.

- D. **Human Services:** Existing staff levels would be maintained and in the Council on Aging Department, five hours would be added weekly to the current part time information referral position to respond to the growing demand for help accessing human services such as fuel assistance and food stamps. In addition, funds for holding one hazardous waste collection day are restored.
- E. **Culture and Recreation:** Existing staff levels are maintained. This is particularly crucial in the Goodnow Library, so that this facility can be open at least as many days as in FY11. Also at this budget level, the amounts available for materials are adequate to meet the demand for new books and materials.
- F. **Unclassified:** The Reserve Fund would have more funds for covering any likely snow and ice deficit as well as any unexpected issues that might arise during the year.

More details on what is sustained under the Level Services budget can be found in the following pages.

Town staff continues to work to reduce the cost of keeping ongoing services intact. The priorities put forth in our FY11 Appropriated Budget document (released September 2010 and available in its entirety on the Town's website) remain at the forefront of this budget cycle as well:

1. Service Outsourcing/Consolidation/Regionalization meant to reduce costs, improve level or protect the high standard services Sudbury taxpayers deserve and have come to expect.
2. Health insurance benefit changes to further reduce the expense trajectory and overall burden on the tax levy for employee healthcare.
3. Begin to address the large, growing unfunded liability for retiree health benefits.
4. Slow the growth in salaries and wages while protecting against further job force erosion.
5. Continue to work on strategies to grow and diversify our tax base and develop alternative sources of revenues.
6. Remain committed to protecting Sudbury's long-term financial health which revolves around our ability to preserve and grow our various reserves.

Two years ago, I began talking about a concept I call the "New Normal" and by that I mean that we recognize the importance of living within our means on a long-term basis, getting our stabilization fund up to an adequate level, stop spending all of the Town's free cash (and the equivalent funds for L-S) on current operating purposes, look to future capital and infrastructure needs of the Town and schools, and lastly, to stop deferring expenses and begin developing plans to address those future expenses which are already deferred. This budget is aligned with these concepts, and I look forward to discussing it further with the Finance Committee and residents of Sudbury.

Sincerely

*Maureen G. Valente*

Maureen G. Valente  
Town Manager

### Summary of FY09-FY12 Budgets for Town Departments

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
General Government	2,117,424	2,207,011	2,284,281	2,353,009
Public Safety	6,330,016	6,297,069	6,767,557	6,860,376
Public Works	3,406,588	3,364,252	3,299,349	3,370,115
Human Services	515,673	520,208	538,651	533,166
Culture & Recreation	1,080,329	1,112,286	1,149,824	1,168,411
Unclassified & Transfer Accounts	113,643	106,619	434,505	416,439
Town Employee Benefits & Insurances	4,153,667	3,964,802	4,224,185	4,556,575
Subtotal	17,717,340	17,572,248	18,698,352	19,258,091
Town Offsets	(230,342)	(381,600)	(468,369)	(522,969)
Total Town Services	17,486,998	17,190,648	18,229,983	18,735,122
% Change from Prior FY	1.1%	-1.7%	6.0%	2.8%

### EMPLOYEE HEADCOUNT

(Full Time Equivalents)

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
<b>Cost Center</b>	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
Public Safety	79.25	76.97	76.97	76.97
Public Works	32.70	31.86	31.28	31.28
General Government	31.80	30.50	30.50	30.50
Human Services	7.20	6.20	6.20	6.20
Culture & Recreation	18.11	16.63	16.12	16.12
Town Operating Sub-total	169.06	162.16	161.07	161.07
Town Enterprises	9.60	9.60	10.18	10.18
<b>TOTAL</b>	178.66	171.76	171.25	171.25

# General Government Services



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>GENERAL GOVERNMENT</b>				
Selectmen/Town Manager	287,644	302,816	310,964	323,991
ATM/Personnel	105,295	111,463	129,362	120,159
Law	175,353	189,712	159,793	162,920
Finance Committee	1,313	1,456	2,003	2,098
Accounting	235,393	245,834	263,102	274,544
Assessors	258,185	261,078	278,677	287,779
Treasurer/Collector	270,963	285,780	291,435	305,308
Information Systems	302,080	312,367	322,451	331,468
Town Clerk & Registrars	219,973	231,684	239,473	246,260
Conservation	105,180	107,266	109,912	115,335
Planning & Board of Appeals	156,045	157,555	177,109	183,148
<b>Total General Government</b>	<b>2,117,424</b>	<b>2,207,011</b>	<b>2,284,281</b>	<b>2,353,009</b>
Personal Services	1,732,588	1,811,486	1,918,501	1,975,251
Expenses	384,836	395,525	365,780	377,758
Total General Government	2,117,424	2,207,011	2,284,281	2,353,009
Salary	1,698,263	1,774,142	1,880,484	1,933,289
Overtime	4,541	2,860	3,016	2,250
Temporary/Seasonal	13,007	10,586	10,969	10,969
Other payroll-related compensation	16,777	23,897	24,032	28,743
	1,732,588	1,811,486	1,918,501	1,975,251

## GENERAL GOVERNMENT: Selectmen/Town Manager

### MISSION OF THE OFFICE

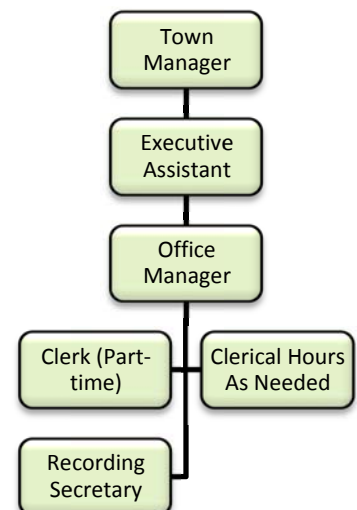
The Board of Selectmen and Town Manager provide executive leadership for the Town of Sudbury. Together, we pursue collaborative processes, ethical, and professional procedures to insure that Town resources are directed to providing the best services possible to protect public safety, public assets and 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 maintains all records of Board of Selectmen's meetings and the database of all Boards and Committees appointments and resignations. The office staff prepares the warrants for all annual and special Town Meetings, and coordinates production of the Town's Annual Report. They maintain the Selectmen's section of the Town's web site.

### STAFFING (FTE's 3.20)

Staff in the Selectmen/Town Manager's office includes the Town Manager, the Executive Assistant to the Board and Town Manager, 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 who earn a reduction in property taxes through the Town's Tax Work-Off Program.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>SELECTMEN/TOWN MANAGER</b>				
Town Manager	144,459	150,211	148,657	163,750
Administration	59,876	63,733	66,691	70,124
Overtime	1,545	0	1,516	0
Clerical	55,300	59,009	68,392	71,517
Executive Incentive Program	7,200	7,028	8,000	0
Non-accountable Travel	5,000	5,500	5,500	5,500
Sick Leave Buy Back	257	3,131	1,558	2,131
<b>Sub Total: Personal Services</b>	<b>273,637</b>	<b>288,611</b>	<b>300,314</b>	<b>313,022</b>
General Expense	11,141	13,379	8,850	9,170
Equipment Maint	154	161	200	200
Travel	162	54	250	250
Out of State Travel	0	610	750	750
Contracted Services	2,550	0	600	599
<b>Sub Total: Expenses</b>	<b>14,007</b>	<b>14,205</b>	<b>10,650</b>	<b>10,969</b>
<b>Total: Selectmen</b>	<b>287,644</b>	<b>302,816</b>	<b>310,964</b>	<b>323,991</b>

## BUDGET ISSUES

Level Services: *Personal Services* – The FY12 budget is increasing by \$12,708, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including most employees of this office, will receive a 1% wage adjustment, as well as any step movements that might be due, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving.

*Expenses* – The FY12 budget is increasing by \$319, compared to the FY11 budget. As in FY11, the Town will be limited in regional purchase and performance groups we can belong to, since membership usually requires a fee. The office will remain limited in acquiring office supplies, such as paper, toners for printers and copiers, etc. Professional development opportunities will continue to be curtailed for this office's staff, as well as for other departments whose travel to educational events is often covered under this budget.

## **GENERAL GOVERNMENT: Assistant Town Manager/Human Resources Director**

### **MISSION OF THE OFFICE**

To ensure the most effective administration of Town government by employing human resources practices and policies that promote and sustain a high performance Town organization through hiring, developing and retaining high caliber employees.

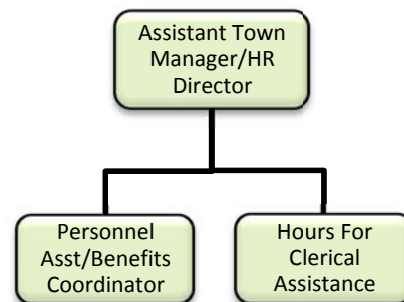
### **DESCRIPTION OF SERVICES**

The Assistant Town Manager/Human Resources 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
- Management of Self-Insured Group Health Insurance Program
- 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 (FTE's 1.90)**

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



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>ASSIST. TOWN MGR./HUMAN RESOURCES</b>				
Human Resources Director	67,828	81,700	100,759	88,630
Benefits Coordinator	20,358	21,207	21,360	22,473
Clerical	14,994	5,420	3,093	4,907
<b>Sub Total: Personal Services</b>	<b>103,180</b>	<b>108,328</b>	<b>125,212</b>	<b>116,009</b>
General Expense	651	1,854	1,750	1,750
Travel	326	154	400	400
Contracted Services	600	500	1,250	1,250
Employee Profess. Develop.	538	628	750	750
<b>Sub Total: Expenses</b>	<b>2,115</b>	<b>3,136</b>	<b>4,150</b>	<b>4,150</b>
<b>Total: ATM/HR</b>	<b>105,295</b>	<b>111,463</b>	<b>129,362</b>	<b>120,159</b>

## BUDGET ISSUES

Level Services: Personal Services – The FY12 budget is decreasing by \$9,203, compared to the FY11 budget, a new Assistant Town Manager/HR Director, Maryanne Bilodeau, began work for the Town following the retirement of Wayne Walker and as a new employee her rate of pay is on a lower step within the position's classification. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, will receive a 1% wage adjustment as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town unions are receiving.

Expenses - The FY12 budget is the same as the FY11 budget. As in FY11, this office will continue to have a very austere level of expense for recruiting, training, and evaluation of employees. The minimal amount for professional development included here seriously undermines not only our commitment to ongoing training for our supervisory staff and our employees, but also the Selectmen's ongoing value of protecting and enhancing the professionalism of the town's staff.



## GENERAL GOVERNMENT: Law

### MISSION OF THE OFFICE

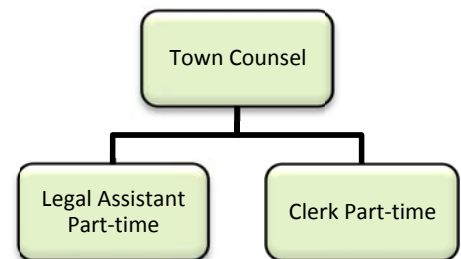
To support the Board of Selectmen, the Town Manager and the Town's departments and committees by providing legal advice and activities which sustain a Town organization that always acts ethically and professionally and avoids unnecessary and costly consequences.

### 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 and Appellate Tax Board matters. Additionally, Town Counsel is involved in land acquisition matters including negotiation and document drafting.

### STAFFING (FTE's 1.30)

Personnel under this budget includes a 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. The Town Manager appoints other office staff.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>LAW</b>				
Town Counsel	42,452	43,511	43,829	43,829
Clerical	31,053	36,607	40,827	41,700
<b>Sub Total: Personal Services</b>	<b>73,505</b>	<b>80,119</b>	<b>84,656</b>	<b>85,529</b>
General Expense	4,405	4,454	5,230	5,230
Legal Expense	97,443	105,140	69,907	72,161
<b>Sub Total: Expenses</b>	<b>101,848</b>	<b>109,594</b>	<b>75,137</b>	<b>77,391</b>
<b>Total: Law</b>	<b>175,353</b>	<b>189,712</b>	<b>159,793</b>	<b>162,920</b>

## BUDGET ISSUES

If any costly legal matters within the year exceed this department's appropriation the Board of Selectmen will seek a reserve fund transfers to supplement this budget. It is difficult to anticipate litigation and appellate tax board matters. Litigation to defend the decisions of the various Town boards can be expensive and difficult to predict. Also included in this budget is the cost for specialized labor counsel. Collective bargaining and settlement of contract disputes are, time consuming processes involving detailed knowledge of labor law at both the federal and state level.

Level Services: Personal Services - The FY12 budget is increasing by \$873, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town will receive a 1% wage adjustment, as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving.

*Expenses* - The FY12 budget is increasing by \$2,254, compared to the FY11 budget. This budget increases legal expense to more appropriately reflect expected costs for litigation and particularly for collective bargaining.

## 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 (FinCom) 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 2½. The Finance Committee may also recommend a budget that exceeds these limits, requiring a Proposition 2½ override question be placed on a ballot at the annual or a special election if approved by the Board of Selectmen and Town Meeting

### STAFFING (FTE's .20)

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

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>FINANCE COMMITTEE</b>				
Clerical	1,196	1,220	1,763	1,851
<b>Sub Total: Personal Services</b>	<b>1,196</b>	<b>1,220</b>	<b>1,763</b>	<b>1,851</b>
General Expense	117	236	240	247
<b>Sub Total: Expenses</b>	<b>117</b>	<b>236</b>	<b>240</b>	<b>247</b>
<b>Total: Finance Committee</b>	<b>1,313</b>	<b>1,456</b>	<b>2,003</b>	<b>2,098</b>

### BUDGET ISSUES

Level Services: Personal Services - The FY12 budget is increasing by \$88, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, will receive a 1% wage adjustment, as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving.

*Expenses* - There is a \$7 increase from FY11 general expense. General expense in this department consists of office supplies used to publish and distribute budget book materials.

## GENERAL GOVERNMENT: Finance Department – Accounting

### MISSION OF THE OFFICE

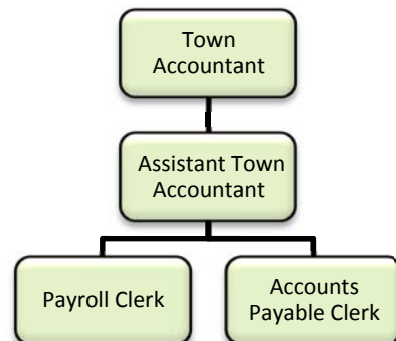
The Mission of the Town Accountant's Office is to protect the Town's financial interests and ensure that Town resources are expended and received according to local bylaws, General Laws of the Commonwealth and sound accounting practices. Charged with maintaining and examining all financial records, the 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. As mandated by law, the Town Accountant examines and approves all financial transactions verifying compliance with all local and state laws. The office maintains the Town's general ledger, and monitors all budgets and provides a monthly budget statement to all departments and boards. It is also responsible for managing the Town's annual audit process and for filing myriad reports with the Department of Revenue and various governmental agencies.

### STAFFING (FTE's 4.0)

The Accounting division of the Finance Department consists of the Town Accountant, the Assistant Town Accountant and two clerical positions. Additionally, some clerical hours are provided by a senior who is earning a reduction in property taxes through the Town's Tax Work-Off Program.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>ACCOUNTING</b>				
Town Accountant	72,827	78,055	81,032	85,017
Salaries	123,563	130,461	140,026	146,251
Sick Leave Buy Back	1,658	2,014	3,095	3,216
Overtime	1,201	506	0	750
<b>Sub Total: Personal Services</b>	<b>199,249</b>	<b>211,035</b>	<b>224,153</b>	<b>235,234</b>
General Expense	5,065	4,236	4,775	4,980
Computer	29,739	28,901	32,028	32,680
Equipment Maint	696	696	1,496	1,000
Travel	644	966	650	650
<b>Sub Total: Expenses</b>	<b>36,144</b>	<b>34,799</b>	<b>38,949</b>	<b>39,310</b>
<b>Total: Accounting</b>	<b>235,393</b>	<b>245,834</b>	<b>263,102</b>	<b>274,544</b>

## BUDGET ISSUES

This office provides accounting and payroll services for both the Sudbury Public Schools (SP) and all Town departments. By volume of payroll and vouchers processed, tax filings, retirement activity, remittances, vendor maintenance, and so on, the larger percentage of activities of this office is attributable to supporting Sudbury Public Schools.

As part of the C.O.R.E. initiative (a collaborative process entered into by the Town Manager and SPS Superintendent in 2009), the Town's Accounting Department assumed an even greater level of responsibility for processing SPS payroll activities. In doing so, SPS was able to reduce its workforce by one part-time payroll clerk. However, no staff has been added to the Town's Accounting Department as a result of the assumption of new responsibilities.

Level Services: *Personal Services* - The FY12 budget is increasing by \$11,081, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, will receive a 1% wage adjustment, as well as any step movement that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving.

*Expenses* – The FY12 budget is increasing by \$361, compared to the FY11 budget. General expense has been increased slightly to accommodate an adequate supply of consumables such as check stock, envelopes and print toners used to carry out this department's mission. The travel line for this department includes travel and accommodations for annual certification classes for both the Town Accountant and

Assistant Town Accountant. Annual audit fee expense previously reported in this department has been moved to Town-wide operating expenses (see Section 3).

## GENERAL GOVERNMENT: Finance Department – Assessors

### MISSION OF THE OFFICE

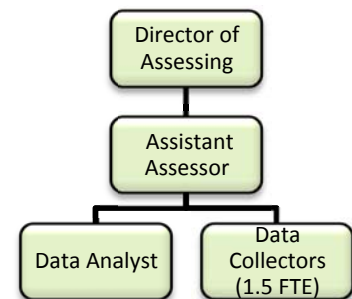
To ensure an equitable share of the tax burden to all taxable real and personal property entities, by regular review and analysis.

### DESCRIPTION OF SERVICES

The Assessor's Office is responsible for the valuation and assessment of property taxes. To accomplish this, all real and personal property is re-valued annually. The valuations are used to fairly allocate the taxes necessary to fund the Town's annual budget. Additionally, this office is responsible for calculating the annual new growth and other factors to determine the Town's tax levy limit. The Assessors' set the annual tax levy and rate(s) for the year, prepare the annual tax rolls, and administers the Motor Vehicle Excise tax program. This office is also responsible for administering the tax exemption/deferral program and act on all abatement and exemption applications, including those administered within the Community Preservation Act Surcharge program. The Assessing Department interacts constantly with the public, and provides a variety of data to numerous Town Departments, committees and State agencies.

### STAFFING (FTE's 4.60)

The personnel in this office include the Director of Assessing, an Assistant Assessor, one full-time data analyst, one full-time and one part-time data collector. The Town Manager appoints all staff.



	FY09	FY10	FY11	FY12
	Actual	Actual	Appropriated	Level Services
<b>ASSESSORS</b>				
Assessor	82,606	84,869	86,741	89,459
Clerical	159,971	165,172	169,519	174,409
Stipend	1,000	1,000	1,000	1,000
Sick Buy Back	1,818	3,084	3,418	4,373
<b>Sub Total: Personal Services</b>	<b>245,395</b>	<b>254,125</b>	<b>260,678</b>	<b>269,241</b>
General Expense	7,590	5,353	4,999	5,538
Contracted Services	5,200	1,600	13,000	13,000
<b>Sub Total: Expenses</b>	<b>12,790</b>	<b>6,953</b>	<b>17,999</b>	<b>18,538</b>
<b>Total: Assessors</b>	<b>258,185</b>	<b>261,078</b>	<b>278,677</b>	<b>287,779</b>



## BUDGET ISSUES

The town depends heavily on property taxes for our primary source of revenue. Therefore, this is a “mission critical” office. The budget for this office is for the staff, materials and contracts needed to perform their mission. General expense for this department consist primarily recording fees for documents at the Middlesex Registry of Deeds and costs associated with property inspections. Also included in this line item are office supplies such as toner and other consumables as well as membership and attendance fees for various meetings of state assessing organizations.

Level Services: *Personal Services* - The FY12 budget is increasing by \$8,563, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including most employees of this office, will receive a 1% wage adjustment, as well as any step movement that might be due, as will the Director of Assessing, who is a member of the Supervisory Association in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving.

*Expenses* - The FY12 budget is increasing by \$539, compared to the FY11 budget. The increase in general expense is to restore the purchasing power for supplies lost in the FY11 budget.

## GENERAL GOVERNMENT: Finance Department – Treasurer/Collector

### MISSION OF THE OFFICE

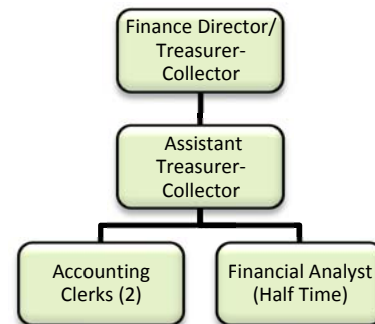
To provide collection, deposit, investment and financial reporting for all funds due to the Town in an efficient and effective manner. To provide all financial custodial services for the Town in compliance with all State and local regulations, in a manner that that best meets the needs of the individual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

### DESCRIPTION OF SERVICES

The Treasurer/Collector office issues over 20,000 new 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 delinquent 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, along with the Board of Selectmen, is a Trustee of Town Trusts, and invests and reports on all Trust Fund Activities. The department also provides notary and passport agency services for the public.

### STAFFING (FTE's 4.60)

The department includes the Finance Director/Treasurer-Collector, the Assistant Treasurer-Collector, 2 full-time clerks and a half time Financial Analyst position. Additionally, some clerical hours are provided by a senior who is earning a reduction in property taxes through the Town's Tax Work-Off Program.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>TREASURER/COLLECTOR</b>				
Fin. Director/Treas.-Collector	92,743	97,315	103,242	108,551
Clerical	132,900	140,356	152,908	159,225
Stipends	2,500	2,500	2,500	2,500
Sick Buy Back		139		1,265
<b>Sub Total: Personal Services</b>	<b>228,143</b>	<b>240,310</b>	<b>258,650</b>	<b>271,540</b>
General Expense	9,743	27,342	8,000	9,300
Equipment Maint	2,020	2,997	1,840	1,500
Travel	1,045	1,069	1,045	1,068
Tax Collection	22,018	14,063	18,900	18,900
Tax Title Expense	7,994	0	3,000	3,000
<b>Sub Total: Expenses</b>	<b>42,820</b>	<b>45,470</b>	<b>32,785</b>	<b>33,768</b>
<b>Total: Treasurer-Collector</b>	<b>270,963</b>	<b>285,780</b>	<b>291,435</b>	<b>305,308</b>

## BUDGET ISSUES

This is a “mission critical” office, as are all the offices in the Finance Department. The budget for this office is for the staff, materials and contracts needed to perform their mission. Tax collection expense consists of bill processing costs, document-recording fees at the Registry of Deeds, advertising and other collection costs. General expense for this department consists primarily of office supplies, banking and other service fees. Mandated personnel in this department also maintain memberships and attend meetings of state collection and treasury management organizations.

Level Services: *Personal Services* - The FY12 budget is increasing by \$12,890, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of this office will receive a 1% wage adjustment, as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving. All non-union employees of the Town, including all employees of this office, are budgeted to receive a 1% wage adjustment commensurate with current union contract terms for FY12.

*Expenses* - The FY12 budget is increasing by \$983, compared to the FY11 budget. The increase in general expense is to restore the purchasing power for supplies lost in the FY11 budget.

## GENERAL GOVERNMENT: Finance Department – Information Systems

### MISSION OF THE OFFICE

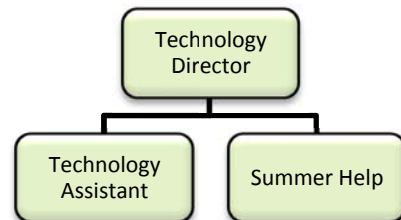
The mission of the Information Systems Office is to increase productivity by streamlining the flow of information through the Town's internal and external network, website and document stores, and provide technical support and training to all Town offices.

### DESCRIPTION OF SERVICES

The information systems division of the Finance Department is responsible for administering and maintaining the Town's network infrastructure, which includes all network and wireless connectivity, users, servers, computers, software, backup, data stores and security. The IT Department manages the Town's Website as well as Telecommunications, including all telephone systems, email, cellular technology, fax operations, pagers and cable television. The IT Department also provides all computer training, software support, system maintenance and repairs. The department is also responsible for GIS administration and the overall management of the Town's electronic documents, providing the capability to archive documents securely while offering efficient access when needed.

### STAFFING (FTE's 2.0)

Staff in the Information Systems Office includes the Technology Director, Technology Assistant with some summer help and a consultant to work on the Town's website. Additionally, some clerical hours are provided by a senior who is earning a reduction in property taxes through the Town's Tax Work-Off Program.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>INFORMATION SYSTEMS</b>				
Technology Administrator	85,538	87,891	89,839	92,474
Non-clerical	59,771	61,232	63,050	63,050
Sick Leave Buy Back	1,932	1,961	1,996	3,681
Summer Help	13,007	10,586	10,969	10,969
<b>Sub Total: Personal Services</b>	<b>160,248</b>	<b>161,671</b>	<b>165,854</b>	<b>170,174</b>
General Expense	3,437	2,829	4,497	4,000
Software	38,875	52,756	45,000	47,500
Equipment Maint	11,541	10,570	8,000	7,000
Travel	649	64	400	400
Contracted Services	24,707	26,966	29,600	36,200
Equipment	379	44,585	40,900	40,900
Professional Development	40,505	1,226	3,700	3,000
WAN/Telephone Connections	11,740	4,491	10,500	9,794
Network	3,471	2,856	5,000	4,500
Internet	6,529	4,353	9,000	8,000
<b>Sub Total: Expenses</b>	<b>141,832</b>	<b>150,696</b>	<b>156,597</b>	<b>161,294</b>
<b>Total: Information Systems</b>	<b>302,080</b>	<b>312,367</b>	<b>322,451</b>	<b>331,468</b>

## BUDGET ISSUES

This is a "mission critical" office, as are all the offices in the Finance Department. The cuts made in this budget in FY09 and FY10 have substantially affected the department's ability to replace failing or obsolete computer desktop inventory and network servers. A half time GIS Administrator approved for FY08 was never filled due to subsequent financial constraints. In FY09, this position was eliminated from the Town's budget. Progress continues with vital GIS initiatives without the aid of a GIS Administrator. However, it places a growing burden on existing staff to accomplish this department's many other duties, most of which are critical to continued operation of all other Town departments.

Level Services: *Personal Services* - The FY12 budget is increasing by \$4,320, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employee of this office will receive a 1% wage adjustment, as well as any step movement that might be due, as will the Technology Administrator, who is a member of the Supervisory Association in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12.

A half time GIS Administrator position was left vacant two years ago and finally cut from the budget in FY09 due to continuing financial constraints. There are still no plans to

restore this position even though vital GIS work is underway. Instead, we purchase a minimal amount of contracted hours recorded as contracted services.

*Expenses* - The FY12 budget is increasing by \$4,697, compared to the FY11 budget. The increase in general expense is to restore the purchasing power for software and GIS consulting lost in the FY11 budget.

## GENERAL GOVERNMENT: Town Clerk, Registrars and Document Preservation

### MISSION OF THE OFFICE

The Town Clerk's office serves as a central information center for the Town by collecting, maintaining and disseminating public records; providing a direct link between the residents of Sudbury and their local government. The mission of this office is to preserve and protect the Town records, including vital records, and to conduct fair and impartial elections for registered voters, in accordance with Massachusetts General Laws, and rendering equal service to all. The office strives to serve the public and all Town departments by being versatile, alert, accurate and patient, thereby meriting public confidence.

### DESCRIPTION OF SERVICES

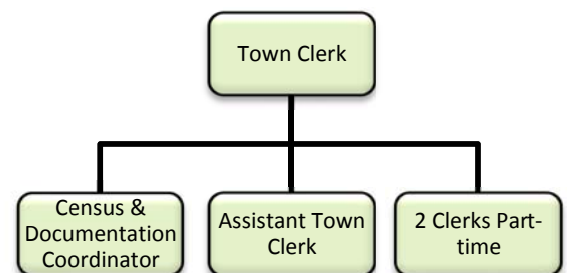
The Town Clerk is the official keeper of the Town Seal and the Town's Oath Book. The Town Clerk oversees and ensures statutory and by-law required functions are performed correctly and efficiently. In conjunction with the Board of Selectmen's Administrative Assistant, Town Moderator and Town Counsel, the Town Clerk insures well run Town Meetings and submits general and zoning bylaw amendments at the close of Town Meeting to the Attorney General for approval.

Other duties include the following:

- 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.
- Chief election official, overseeing polling places, election officers, and the general conduct of all elections.
- Administers campaign finance laws, certifies nomination papers and initiative petitions and serves on the local Board of Registrars.
- Conducts the annual town census and prepares the street list of residents.
- Custodian of Town records and official documents, responsible for the maintenance, preservation, public inspection of and disposition of Town records.
- Administers dog licensing program and provides notary services to the public

### STAFFING (FTE's 4.20)

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. Office staff completes the work of the Committee for the Preservation of Town Documents.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>TOWN CLERK &amp; REGISTRARS</b>				
Town Clerk	58,905	62,890	65,489	68,725
Overtime	1,795	2,354	1,500	1,500
Clerical	119,896	124,934	129,777	135,555
Election Workers	12,731	14,047	16,000	13,000
Registrars	882	882	932	932
<b>Sub Total: Personal Services</b>	<b>194,209</b>	<b>205,107</b>	<b>213,698</b>	<b>219,712</b>
General Expense	9,881	8,213	11,550	11,798
Equipment Maint	0	0	875	0
Travel	653	1,031	850	850
Tuition	858	543	500	1,400
Elections	14,372	16,791	12,000	12,500
<b>Sub Total: Expenses</b>	<b>25,764</b>	<b>26,577</b>	<b>25,775</b>	<b>26,548</b>
<b>Total: Town Clerk &amp; Registrars</b>	<b>219,973</b>	<b>231,684</b>	<b>239,473</b>	<b>246,260</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$6,014, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including most employees of this office, will receive a 1% wage adjustment, as well as any step movement that might be due, as will the Town Clerk who is a member of the Supervisory Association in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving. All non-union employees of the Town, including most employees of this office, are budgeted to receive a 1% wage adjustment commensurate with current union contract terms for FY12.

*Expenses* - The FY12 budget is increasing by \$773, compared to the FY11 budget. This level of budget still does not allow for adequate investment in archival storage materials or other tasks that preserve the Towns' vital records. General expense provides for only a minimal amount of microfilming of permanent records. Tuition for this department includes annual training for both the Town Clerk and Assistant Town Clerk.



## GENERAL GOVERNMENT: Conservation

### MISSION OF THE OFFICE

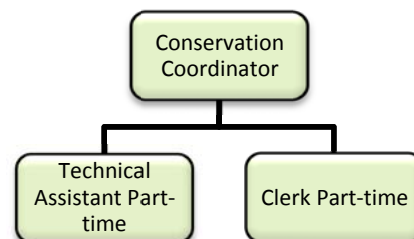
The Sudbury Conservation Commission was established in 1962 to protect local natural resources and features and to act as stewards of the Town's conservation properties. The Conservation Commission's primary mission is to protect the ecological integrity of Sudbury's wetlands and the surrounding landscape.

### 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 eleven major 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. The Coordinator has been asked to lead a three staff member team to assess and make recommendations for meeting all current and future requirements of EPA/DEP mandated stormwater permit for the Town, including all required public education efforts and annual reporting.

### STAFFING (FTE's 2.0)

Current staffing includes a full-time Conservation Coordinator, a part-time clerical position, and a part-time Technical Assistant shared with the Board of Health.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>CONSERVATION</b>				
Conservation Coordinator	70,658	72,607	74,994	77,191
Non Clerical	18,117	19,302	20,206	21,205
Clerical	10,776	10,933	11,453	11,568
Sick Leave Buy Back	1,612	1,637	1,707	1,775
<b>Sub Total: Personal Services</b>	<b>101,163</b>	<b>104,479</b>	<b>108,360</b>	<b>111,738</b>
General Expense	2,631	657	150	2,155
Clothing	458	450	450	450
Trail Equipment Maint	0	922	711	732
Travel	928	758	241	260
<b>Sub Total: Expenses</b>	<b>4,017</b>	<b>2,787</b>	<b>1,552</b>	<b>3,597</b>
<b>Total: Conservation</b>	<b>105,180</b>	<b>107,266</b>	<b>109,912</b>	<b>115,335</b>

## BUDGET ISSUES

Besides personnel costs, this office has very limited expenses. General expense primarily consists of required membership and training provided by state conservation organizations, for both Commissioners and staff. Travel expense consists of reimbursements to staff for using their own vehicles to attend training and when visiting sites in town for inspection, enforcement, etc. Funds are also budgeted each year to maintain and improve the trails on all conservation land in town.

Level Services: *Personal Services* - The FY12 budget is increasing by \$3,378, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employees of this office will receive a 1% wage adjustment, as well as any step movement that might be due, as will the Conservation Coordinator who is a member of the Supervisory Association in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving. All non-union employees of the Town, including most employees of this office, are budgeted to receive a 1% wage adjustment commensurate with current union contract terms for FY12.

*Expenses* - The FY12 budget is increasing by \$2,045, compared to the FY11 budget. General expense has been increased to allow for storm water testing, which is a requirement of the Town's stormwater permit.

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

### **MISSION OF THE DEPARTMENT**

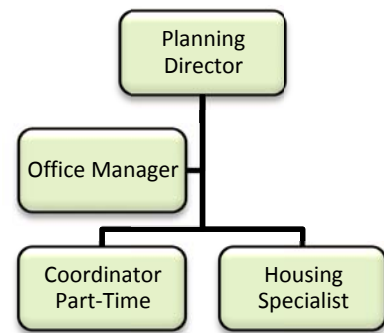
The mission of the department is to provide technical advisory services and coordination of town officials, committees, and commissions on issues involving planning, zoning, land management, development/re-development and affordable housing.

### **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, Sudbury Housing Trust, Historical Commission, and Historic Districts Commission. Staff also provides coordination and advisory services for the Conservation Commission and the Board of Health. The department processes and reviews development applications, coordinates land acquisition projects, and communicate 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 (FTE's 2.50)**

The personnel in the department include a full-time Director of Planning and Community Development, a part-time Planning and Zoning Coordinator (funded partially with CPA funds), a full-time Community Housing Specialist (funded entirely with CPA funds and Housing Trust revenue) and a part-time office manager. The Community Housing Specialist position was added to the department in FY07, as was a recording secretary to attend Planning Board meetings bi-monthly. The Planning and Zoning Coordinator position was added to the department in FY09, replacing the long held position of Zoning Board of Appeals Office Supervisor.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>PLANNING &amp; COMMUNITY DEVELOPMENT</b>				
Planning Director	93,064	95,801	100,909	103,824
Clerical	58,599	57,749	70,996	74,074
Stipend	1,000	1,000	1,000	1,000
Sick Leave Buy Back	-	1,932	2,258	2,303
<b>Sub Total: Personal Services</b>	<b>152,663</b>	<b>156,482</b>	<b>175,163</b>	<b>181,202</b>
General Expense	2,680	801	1,121	1,121
Professional Development	577	272	700	700
Clothing Allowance	125	0	125	125
<b>Sub Total: Expenses</b>	<b>3,382</b>	<b>1,073</b>	<b>1,946</b>	<b>1,946</b>
<b>Total: Planning</b>	<b>156,045</b>	<b>157,555</b>	<b>177,109</b>	<b>183,148</b>

## BUDGET ISSUES

Besides personnel costs, this office has very limited expenses. General expense primarily consists of standard office supplies and advertising costs for public hearings.

Level Services: *Personal Services* - The FY12 budget is increasing by \$6,039, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, will receive a 1% wage adjustment, as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. This is, for the most part, the same wage adjustments as Town union members are receiving. All non-union employees of the Town, including all employees of this office, are budgeted to receive a 1% wage adjustment commensurate with current union contract terms for FY12.

*Expenses* - The FY12 budget is at the same level, compared to the FY11 budget. Funds have been included to allow the Director to attend important professional development opportunities held in the area.

# Public Safety Services



**Sudbury Fire  
Headquarters**



**Sudbury Police  
Station**

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>PUBLIC SAFETY</b>				
Police	2,626,498	2,505,324	2,756,869	2,811,844
Fire	2,823,482	2,945,144	3,065,135	3,089,657
Building Department	880,036	846,601	945,553	958,875
<b>Total Public Safety</b>	<b>6,330,016</b>	<b>6,297,069</b>	<b>6,767,557</b>	<b>6,860,376</b>
Personal Services	5,214,211	5,241,809	5,539,407	5,588,415
Expenses	1,021,505	960,960	1,133,850	1,153,961
Capital	94,300	94,300	94,300	118,000
<b>Total Public Safety</b>	<b>6,330,016</b>	<b>6,297,069</b>	<b>6,767,557</b>	<b>6,860,376</b>
Salary	4,333,068	4,291,495	4,722,330	4,744,593
Overtime	751,986	826,106	646,976	686,557
Other payroll-related compensation	129,157	124,209	170,101	157,265
	5,214,211	5,241,809	5,539,407	5,588,415

## PUBLIC SAFETY: Police Department

### MISSION OF THE DEPARTMENT

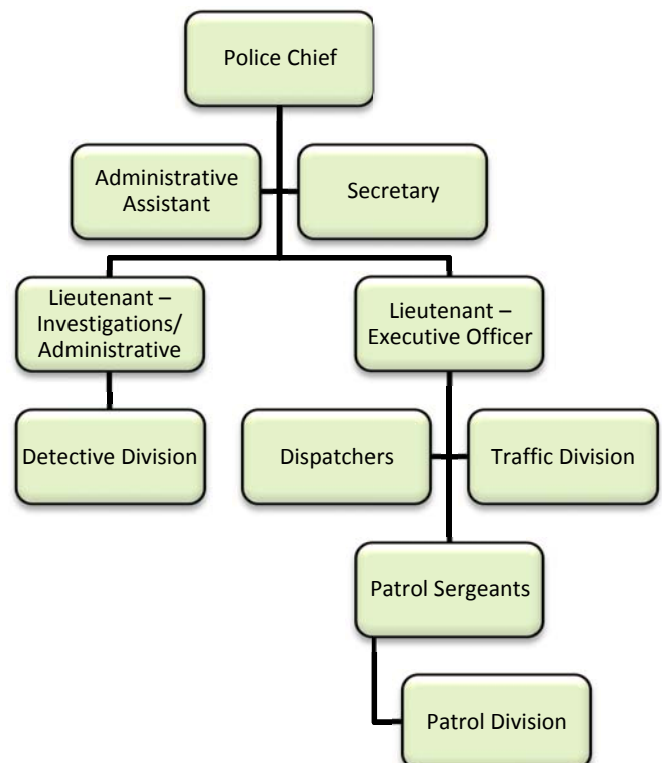
The mission of the Sudbury Police Department is to work with all residents of the community to create a positive partnership emphasizing equality, fairness, integrity and professionalism. Our objective is to provide the most responsive and highest quality police services possible by working in a collaborative 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 (FTE's 31.92)

The Sudbury Police Department has authorization for a sworn staff of 29 (one chief, two lieutenants, five sergeants, and twenty-one patrol officers with one patrol position remaining vacant due to a lack of funding) plus four civilian dispatchers and two administrative positions.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>POLICE</b>				
Police Chief	133,382	116,615	121,149	128,033
Lieutenant	181,800	121,200	188,862	215,918
Patrol Officers	1,417,949	1,445,354	1,524,747	1,489,491
Night Differential	22,093	24,657	25,760	25,760
Overtime	230,682	252,868	232,900	260,000
Clerical	97,603	93,349	96,511	100,292
Dispatchers	155,685	116,204	174,113	178,254
Sick Leave Buy Back	9,043	3,062	9,714	9,714
Holiday Pay	13,347	12,333	15,329	15,329
Non-accountable Clothing	11,375	10,975	12,180	11,760
Stipend	32,081	32,308	33,375	30,625
<b>Sub Total: Personal Service</b>	<b>2,305,040</b>	<b>2,228,925</b>	<b>2,434,640</b>	<b>2,465,176</b>
General Expense	53,743	50,793	49,708	54,708
Maintenance	62,280	56,883	58,580	63,580
Travel	1,380	1,932	3,000	3,000
Clothing	19,727	18,754	19,180	20,880
Tuition	5,299	2,708	9,000	9,000
Equipment	8,435	2,785	7,500	7,500
Gasoline	76,294	48,244	80,961	70,000
<b>Sub Total: Expenses</b>	<b>227,158</b>	<b>182,099</b>	<b>227,929</b>	<b>228,668</b>
Police Cruisers	94,300	94,300	94,300	118,000
<b>Sub Total: Capital</b>	<b>94,300</b>	<b>94,300</b>	<b>94,300</b>	<b>118,000</b>
<b>Total: Police</b>	<b>2,626,498</b>	<b>2,505,324</b>	<b>2,756,869</b>	<b>2,811,844</b>
<b>OFFSET Dispatch Grant</b>	-	-	(25,000)	(25,000)
<b>Net Police</b>	<b>2,626,498</b>	<b>2,505,324</b>	<b>2,731,869</b>	<b>2,786,844</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$30,536, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employees of this office will receive a 1% wage adjustment, as well as any step movements that might be due, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. There are two unions with employees in this department: Teamsters Local 25 represents the civilian dispatchers, and those employees will receive a 1% wage adjustment as well as any step movements that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. The Sudbury police union

members will receive no wage increase except for step movements, per their contract with the Town in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums.

One patrol officer position continues to remain vacant due to a lack of funding. Overtime has been increased substantially from FY11 to better reflect current required levels for shift and emergency coverage based on the last three years of actual activities. The goal is for the Chief to be able to back fill up to 65% of shifts that may be open due to officers being on vacation or sick leave, and to hold over shifts at times of public emergencies, such as blizzards. A Dispatch grant from the State will be used to offset payroll expense for dispatchers.

*Expenses* - The FY12 budget is increasing by \$24,439, compared to the FY11 budget. Funds have been restored for an additional police vehicle, so that five vehicles can be purchased each year, as has been the practice until three years ago. Timely replacement ensures the vehicles are not spending much time the repair shop and are available for use, and that unmarked vehicles can continue to be “passed down” to other departments.



## PUBLIC SAFETY: Fire Department

### MISSION OF THE DEPARTMENT

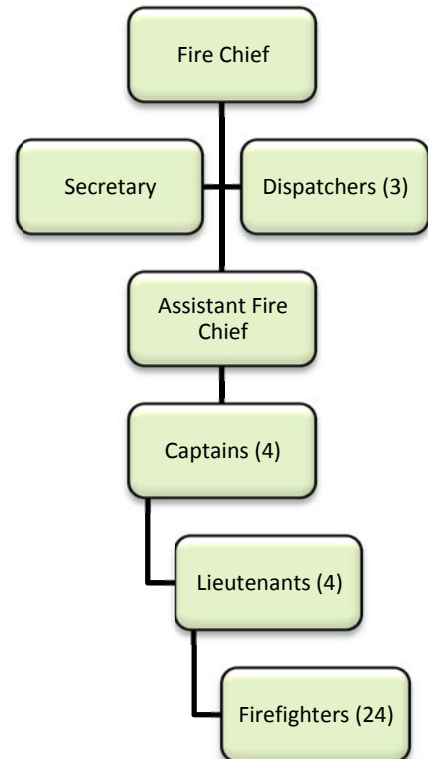
The mission of the Sudbury Fire Department is to protect the lives and property of the community from emergencies involving fire, medical, hazardous materials, and environmental causes.

### 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 (FTE's 41.65)

Currently the Department consists of 1 Chief, 1 Assistant Chief, 4 Captains, 4 Lieutenants and 24 firefighters, as well as 2.5 civilian dispatchers and a 3/4 secretary. The Captains, Lieutenants and firefighters are organized into four groups, with each group comprising one Captain, one Lieutenant and six firefighters. Thirty-five personnel are certified Emergency Medical Technicians; six are certified as paramedics, even though the Town does not, as of the preparation of this budget, offer advanced life support services using Fire Department personnel.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>FIRE</b>				
Fire Chief	116,861	126,772	132,903	108,916
Deputy Chief	94,399	100,803	106,771	91,285
Firefighters/EMTs	1,655,324	1,666,194	1,852,822	1,901,971
Overtime	521,304	573,238	409,076	421,557
Weekend Differential	0	0	5,220	5,220
Clerical	34,446	36,783	38,442	40,345
Dispatchers	108,956	107,013	114,081	107,467
Non-accountable Clothing	22,713	22,014	28,300	25,400
Sick Buy Back	6,147	6,240	7,199	8,209
Fire Stipends	10,936	11,175	31,522	23,700
<b>Sub Total: Personal Service</b>	<b>2,571,086</b>	<b>2,650,232</b>	<b>2,726,336</b>	<b>2,734,071</b>
General Expense	34,308	33,883	42,687	42,687
Maintenance	54,606	64,828	63,771	64,828
Alarm Maint.	2,513	4,373	3,000	4,373
Travel	1,298	1,001	2,130	2,130
Utilities	45,878	42,998	52,770	52,770
Clothing	3,014	7,996	19,020	19,020
Tuition	4,508	11,768	10,000	11,768
Contracted Services	38,371	87,406	84,817	87,406
Equipment	29,216	17,738	28,750	38,750
Gasoline/Diesel Fuel	38,684	22,921	31,854	31,854
<b>Sub Total: Expenses</b>	<b>252,396</b>	<b>294,912</b>	<b>338,799</b>	<b>355,586</b>
<b>Total: Fire</b>	<b>2,823,482</b>	<b>2,945,144</b>	<b>3,065,135</b>	<b>3,089,657</b>
<b>OFFSET Ambulance Fund</b>	<b>(230,342)</b>	<b>(381,600)</b>	<b>(429,089)</b>	<b>(452,133)</b>
<b>Net Fire</b>	<b>2,593,140</b>	<b>2,563,544</b>	<b>2,636,046</b>	<b>2,637,524</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$7,735, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. With the retirement of Chief Ken MacLean in January 2011 and Assistant Chief Michael Carroll in September 2010, Chief William Miles and Assistant Chief John Whalen have assumed those positions and are on lower steps on their appropriate pay grade. The non-union employees of this office will receive a 1% wage adjustment, as well as any step movements that might be due, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. There are two unions with employees in this department: Teamsters Local 25 represents the civilian dispatchers, and those employees will receive a 1% wage adjustment wage

adjustment as well as any step movements that might be due in exchange for paying an additional 2.5% for their health insurance premiums. The Sudbury firefighter's association members will also receive 1% wage increase and step movements, per their contract with the Town, in exchange for paying 2.5% more for their health insurance premiums.

*Expenses* – The FY12 budget is increasing by \$16,787, compared to the FY11 budget. Many expenses are level funded to FY11. In addition to restoring some purchasing power lost in the previous budget cycle for maintenance, contracted services and tuition, the department is requesting \$10,000 be added to equipment to purchase ALS ambulance supplies over and above the BLS supply requirements.

*Ambulance Services Offset* – The FY12 budget is increasing by \$23,044, compared to the FY11 budget. This line item is used to offset payroll and general expenses relating to the Town's growing ambulance services.

## **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**

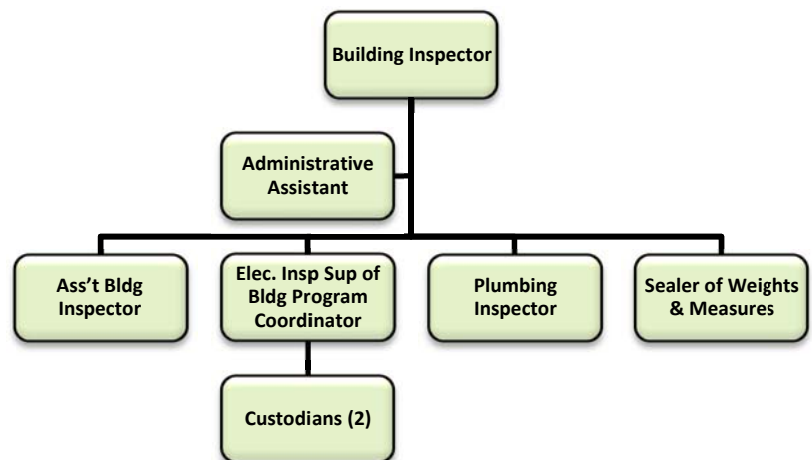
The Building Department staff enforces State building, electrical, plumbing, gas and mechanical codes, as well as local zoning by-laws and Architectural Access Board Regulations. Many of the functions of the Department are mandated by the Commonwealth of Massachusetts, including enforcement and implementation 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 more than 2,000 permits a year.

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. 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 daily distribution of U.S. mail and interoffice mail to all departments and the processing of outgoing mail.

Beginning in FY11, the Building Inspector added the responsibility of advising and working with the Town's Green Ribbon Energy and Sustainability Committee to examine ways to make Town and School Buildings more energy efficient and to apply for and administer grants in connection with this committee's efforts.

### **STAFFING (FTE's 6.40)**

This office consists of the Building Inspector, an Assistant Building Inspector, and an Electrical Inspector/Supervisor of Buildings, a Plumbing Inspector (part-time), two custodians, and an administrative assistant.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>BUILDING INSPECTION</b>				
Building Inspector	81,738	83,982	85,438	88,499
Supv. of Town Bldgs.	63,358	64,746	66,673	68,613
Asst. Bldg Inspector	48,564	56,533	59,166	62,097
Clerical	38,289	49,202	50,544	52,006
Deputy Inspector	1,958	1,440	2,500	2,000
Overtime	0	0	5,000	5,000
Sealer of Weights	2,150	2,150	2,150	2,150
Wiring Inspector	13,050	13,050	13,050	13,050
Custodial	87,556	90,106	92,408	94,205
Sick Buyback	1,422	1,444	1,502	1,548
<b>Sub Total: Personal Service</b>	<b>338,085</b>	<b>362,652</b>	<b>378,431</b>	<b>389,168</b>
General Expense	3,428	8,811	7,500	7,500
Town Bldg. Utilities	303,695	263,528	337,900	329,647
Town Bldg. Maint.	179,300	161,241	164,347	164,347
Vehicle Maintenance	938	1,631	2,500	2,500
Contracted services	47,877	44,381	49,900	60,738
Clothing allowance	1,475	1,475	1,475	1,475
In-State Travel	5,238	2,883	3,500	3,500
<b>Sub Total: Expenses</b>	<b>541,951</b>	<b>483,949</b>	<b>567,122</b>	<b>569,707</b>
<b>Total: Building</b>	<b>880,036</b>	<b>846,601</b>	<b>945,553</b>	<b>958,875</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$10,737, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including most employees of this office, will receive a 1% wage adjustment, as well as any step movement that might be due, as will the Building Inspector and Wiring Inspector, who are members of the Supervisory Association, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12.

*Expenses* - The FY12 budget is increasing by \$2,585, compared to the FY11 budget. This budget looks to restore contracted cleaning services for Town buildings to FY08 levels primarily through expected savings in building utilities.

# Public Works Department



**Public Works  
Building**

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>PUBLIC WORKS</b>				
Engineering	385,821	316,116	396,661	409,939
Streets & Roads	2,396,024	2,434,193	2,326,247	2,408,245
Trees and Cemetery	337,111	335,913	337,674	366,729
Parks and Grounds	287,632	278,030	238,767	185,202
<b>Total Public Works</b>	<b>3,406,588</b>	<b>3,364,252</b>	<b>3,299,349</b>	<b>3,370,115</b>

Personal Services	1,671,027	1,677,233	1,755,917	1,753,772
Expenses	1,094,241	1,109,370	1,128,777	1,191,594
Snow & Ice	641,320	577,649	414,655	424,750
<b>Total Public Works</b>	<b>3,406,588</b>	<b>3,364,252</b>	<b>3,299,349</b>	<b>3,370,115</b>
Salary	1,618,959	1,615,377	1,678,524	1,678,011
Overtime (excl'd snow & ice)	29,489	35,496	36,060	36,735
Temporary/Seasonal	16,162	21,104	18,093	18,093
Other payroll-related compensation	6,417	5,257	23,240	20,933
	1,671,027	1,677,233	1,755,917	1,753,772

## **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.

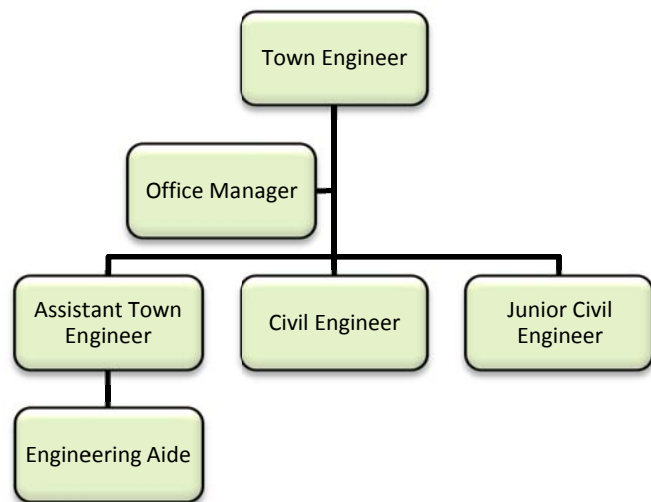
### **DESCRIPTION OF SERVICES**

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 projects 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 \$3.2 million in appropriations (FY '09 dollars), and provides executive level planning and direction to 5 divisions, and 34 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 (FTE's 5.16)**

The engineering division staffing generally consists of the Town Engineer/DPW Director, Assistant Town Engineer, one Civil Engineer, one Junior Civil Engineer, one Engineering Aide, and an Office Manager.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>ENGINEERING DEPARTMENT</b>				
Dir. of Public Works	112,039	113,586	116,701	120,114
Non-Clerical	206,703	134,484	214,320	223,749
Clerical	48,169	49,352	50,694	52,158
Sick Leave Buy Back	4,297	4,399	2,560	2,611
<b>Sub Total: Personal Services</b>	<b>371,208</b>	<b>301,821</b>	<b>384,275</b>	<b>398,632</b>
General Expense	9,447	10,735	7,161	7,532
Maintenance	2,000	1,113	1,500	1,500
Travel	22	16	100	100
Clothing	3,144	2,431	3,625	2,175
<b>Sub Total: Expenses</b>	<b>14,613</b>	<b>14,295</b>	<b>12,386</b>	<b>11,307</b>
<b>Total: Engineering</b>	<b>385,821</b>	<b>316,116</b>	<b>396,661</b>	<b>409,939</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$14,357, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. Two non-union employees of the Town will receive a 1% wage adjustment, as well as any step movement that might be due in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. The two members of the Engineers Union will receive any step movement that might be due. The non-clerical line has two vacancies since the retirement of the Assistant Town Engineer and the Junior Civil Engineer. Replacement of these positions is expected but at lower starting salaries.

*Expenses* - The FY12 budget is decreasing by \$1,079, compared to the FY11 budget. This budget while almost level funded with FY11 requires this department like many others to continue to operations at a level substantially lower than three years ago.



## PUBLIC WORKS: Streets and Roads

### MISSION OF THE OFFICE

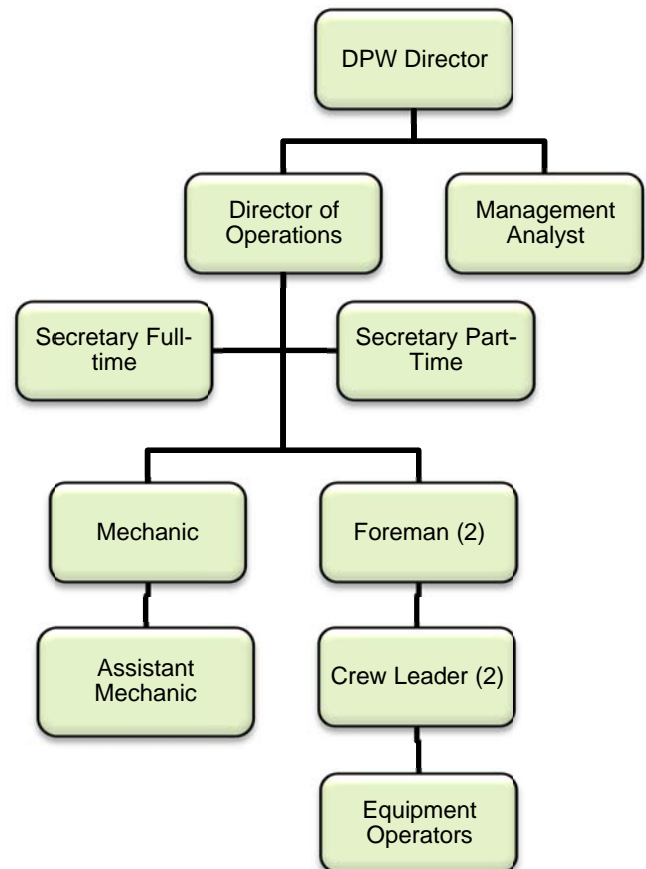
The mission of the Streets and Roads Division is to protect the safety, health and welfare of the Town Residents by maintaining the town streets, walkways and storm water system in a safe and clean condition. This department also provides for the safe movement of vehicular traffic by performing minor 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 (FTE's 16.40)

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, and three Light Equipment Operators.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>STREETS &amp; ROADS</b>				
Highway Dir. of Operations	73,993	79,015	81,596	85,030
Management Analyst	73,777	75,704	77,755	80,005
Non-Clerical	599,096	640,594	643,432	673,661
Overtime	19,117	23,380	22,605	23,280
Clerical	48,620	51,226	54,703	57,050
Stipends	0	0	8,190	8,190
Summer Temp. Labor	0	5,668	5,068	5,068
Sick Leave Buy Back	1,085	858	1,810	1,942
<b>Sub Total: Personal Services</b>	<b>815,688</b>	<b>876,445</b>	<b>895,159</b>	<b>934,225</b>
General Expense	6,300	6,671	11,700	11,700
Gasoline	179,648	102,372	127,000	130,000
Bldg. Maintenance	12,741	14,836	16,000	16,480
Vehicle Maintenance	161,266	165,357	175,500	179,000
Utilities	13,818	12,047	17,150	15,150
Street Lighting	53,216	54,814	65,405	58,000
Travel	254	376	300	300
Clothing	15,020	14,621	17,045	18,000
Tuition	0	0	1,500	1,500
Police detail	38,534	42,314	38,000	39,140
Roadwork	458,219	566,691	546,833	580,000
<b>Sub Total: Expenses</b>	<b>939,016</b>	<b>980,099</b>	<b>1,016,433</b>	<b>1,049,270</b>
Snow & Ice Overtime	195,311	144,584	117,407	120,750
Snow & Ice Contractors	157,130	139,239	106,520	109,000
Snow & Ice Materials	288,879	293,826	190,728	195,000
<b>Sub Total: Snow &amp; Ice</b>	<b>641,320</b>	<b>577,649</b>	<b>414,655</b>	<b>424,750</b>
<b>Total: Streets &amp; Roads</b>	<b>2,396,024</b>	<b>2,434,193</b>	<b>2,326,247</b>	<b>2,408,245</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$39,066, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The few non-union employees of this office will receive a 1% wage adjustment, as well as any step movement that might be due, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. Most staff in this department are members of the public works (AFL-CIO) union, and they will receive any step movement that might be due.

*Expenses* - The FY12 budget is increasing by \$32,837, compared to the FY11 budget. This budget increases roadwork which has been underfunded over the last few years. Vehicle maintenance and police details have also been partially restored using anticipated savings in street lighting expense.

Snow and ice accounts have received a modest increase of \$10,095, as compared to the FY11 budget. Snow and ice expense is one of the more complicated aspects of municipal budgeting, given the unpredictability of winter weather. Since state law allows towns to 'deficit spend' in this area, so long as we appropriate *at least* what was appropriated in the previous year. Sudbury has used the approach of budgeting snow and ice using the average of the past several years' expenses, and setting aside funds into the Reserve Fund to augment the regular snow and ice budget, as needed. If snow and ice expense exceeds the Reserve Fund's capacity, then the town can either carry the deficit into the next year, or reduce spending in other lines to transfer to the deficit in the current year, or some combination of the two.

## **PUBLIC WORKS: Trees and Cemetery**

### **MISSION OF THE DIVISION**

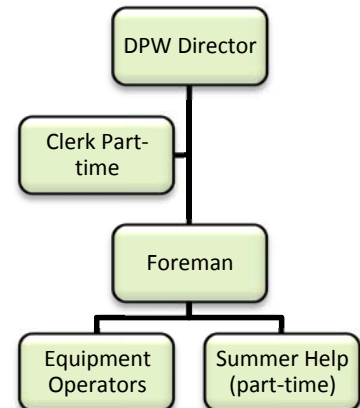
The Mission of this division is twofold: (1) to protect and keep in a healthy state an important public asset of the Town – the beautiful shade trees that are found in the Town's public way and (2) the cemetery division staff provides compassionate, courteous and professional service to bereaved families and strives to maintain a tranquil, well-maintained environment in the Town's 27 acres contained within 7 cemeteries including 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 (FTE's 6.0)**

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



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>TREES &amp; CEMETERY</b>				
Non-Clerical	235,874	245,834	244,952	257,444
Overtime	6,937	9,924	9,000	9,000
Clerical	12,315	12,859	16,473	15,050
Stipends	0	0	4,095	4,095
Summer help	4,767	3,174	5,068	5,068
<b>Sub Total: Personal Services</b>	<b>259,893</b>	<b>271,792</b>	<b>279,588</b>	<b>290,657</b>
Cemetery Materials	15,218	11,059	18,000	23,009
Tree Contractors	62,000	53,063	40,086	53,063
<b>Sub-Total: Expenses</b>	<b>77,218</b>	<b>64,121</b>	<b>58,086</b>	<b>76,072</b>
<b>Total: Trees &amp; Cemetery</b>	<b>337,111</b>	<b>335,913</b>	<b>337,674</b>	<b>366,729</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$11,069, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. Most staff in this department are members of the public works (AFL-CIO) union, and they will receive any step movement that might be due.

*Expenses* -The FY12 budget is increasing by \$17,986, compared to the FY11 budget. Funding for cemetery materials has been increased to restore service levels available prior to FY09. Tree contractor expense has also been increased well beyond the low level afforded in FY10 and FY11. The additional \$12,977 is deemed critical to remove the growing backlog of dead/dying trees along town roadways that has accumulated due to several years of budgetary constraints.

It is important to note that perpetual (maintenance) care of the cemeteries is set up to be paid through the use of Town's cemetery perpetual care fund. Perpetual care funds are obtained by the sale of cemetery lots, with most of the fees collected going into a non-expendable trust fund. The principal in this fund is never actually spent by the Town. Instead only the annual interest earnings from investment may be used for cemetery care. These interest earnings have reduced significantly over the past few years, while the cost of contracted care services continues to rise with inflation leaving a large gap between the amount of maintenance that is necessary and the funds available to pay for it. Town officials are looking into ways to supplement perpetual care by diverting or generating additional revenues for immediate use. However, with only 50 lots purchased in a typical year, this would likely only generate limited additional funds for current spending.

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

### **MISSION OF THE OFFICE**

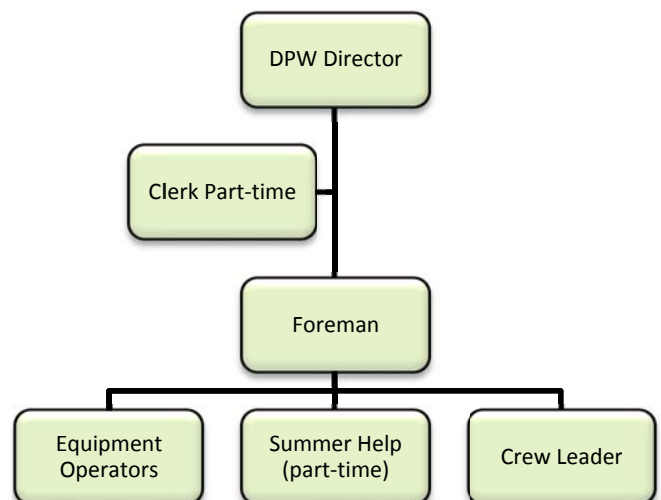
The Mission of this division is to maintain landscaping throughout the Town in park and field areas, public right-of-ways and around all public buildings and school grounds.

### **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, and Ephraim Curtis Middle Schools; Featherland Park, Davis Field, Frank Grinnell Veterans Memorial Park, Haskell Field, Fairbank Community Center, Frank G. Feeley Field, Cutting Field, Horse Pond Play Field, Training 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 (FTE's 3.72)**

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.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>PARKS &amp; GROUNDS</b>				
Non-Clerical	200,811	204,452	169,432	104,866
Overtime	3,435	2,192	4,455	4,455
Clerical	7,562	8,269	8,466	8,884
Stipends	0	0	4,065	4,095
Summer help	11,395	12,261	7,957	7,957
Sick Leave Buy Back	1,035	0	2,520	0
<b>Sub Total: Personal Services</b>	<b>224,238</b>	<b>227,175</b>	<b>196,895</b>	<b>130,257</b>
Maintenance	60,537	48,056	38,872	51,745
Clothing	2,857	2,799	3,000	3,200
<b>Sub Total: Expenses</b>	<b>63,394</b>	<b>50,855</b>	<b>41,872</b>	<b>54,945</b>
<b>Total: Parks &amp; Grounds</b>	<b>287,632</b>	<b>278,030</b>	<b>238,767</b>	<b>185,202</b>

## BUDGET ISSUES

Level Services: *Personal Services* – In FY10, the new Field Maintenance Enterprise Fund was created so that some of the costs of this division could be supported by the users of the Recreation playing fields. Beginning with FY11 up to 50% of the crew payroll expense will be allocated to (and paid for by) the Field Maintenance Enterprise fund. Therefore, the FY12 budget is decreasing by \$66,638, compared to the FY11 budget but covers the same level of personnel. Most staff in this department are members of the public works (AFL-CIO) union, and they will receive any step movement that might be due.

*Expenses* - The FY12 budget is increasing by \$13,073, compared to the FY11 budget. This budget looks to restore grounds maintenance of all public buildings closer to FY08 levels. Funding of this line over the last couple of years has been inadequate to provide more than the minimal attention to the many town building and school grounds.

# Human Services



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>HUMAN SERVICES</b>				
Board of Health	365,236	370,083	374,534	376,563
Council on Aging	135,241	134,301	146,702	139,187
Veterans Affairs	15,196	15,825	17,415	17,415
<b>Total Human Services</b>	<b>515,673</b>	<b>520,208</b>	<b>538,651</b>	<b>533,166</b>
Personal Services	353,965	361,213	380,684	362,524
Expenses	161,708	158,995	157,967	170,642
Total Human Services	515,673	520,208	538,651	533,166
Salary	352,048	359,267	378,699	360,419
Overtime				
Temporary/Seasonal				
Other payroll-related compensation	1,917	1,946	1,985	2,105
	353,965	361,213	380,684	362,524



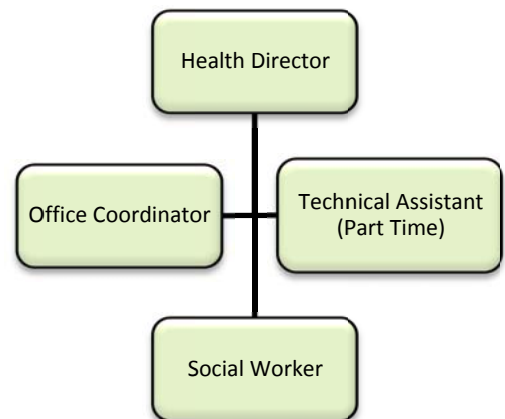
## HUMAN SERVICES: Board of Health

### 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 (FTE's 3.0)

This department generally consists of the Health Director, two part-time social workers, one part-time technical assistant shared with the Conservation Department, 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. When funding allows, the Household Hazardous Waste Day budgeted requires a licensed contractor for the collection. Animal/Rabies control services are provided through a contract as well.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>BOARD OF HEALTH</b>				
Director	84,661	86,998	89,129	91,744
Town Social Worker	85,251	86,819	71,520	57,885
Non-Clerical	0	0	20,206	21,205
Clerical	41,197	43,016	43,527	44,782
Sick Buy Back	1,917	1,946	1,985	2,105
<b>Sub Total: Personal Services</b>	<b>213,026</b>	<b>218,779</b>	<b>226,367</b>	<b>217,721</b>
General Expense	3,938	2,861	3,700	4,100
Maintenance	1,102	215	0	0
Mental Health	10,900	10,240	9,400	10,400
Nursing Services	51,347	51,347	51,347	51,347
Contracted Services	3,990	2,580	4,100	11,300
Lab Expense	70	0	0	0
Mosquito Control	45,415	45,415	45,415	45,415
Animal/ Rabies Control	8,550	8,365	8,600	8,800
Animal Inspector	1,909	2,501	1,725	2,000
Senior Outreach	23,900	26,625	21,680	23,680
Community Outreach Prog	1,089	1,154	2,200	1,800
<b>Sub Total: Expenses</b>	<b>152,210</b>	<b>151,303</b>	<b>148,167</b>	<b>158,842</b>
<b>Total: Board of Health</b>	<b>365,236</b>	<b>370,083</b>	<b>374,534</b>	<b>376,563</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is decreasing by \$8,646, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employees of this office, along with the Health Director, who is a member of the Supervisory Association, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. The overall decrease in personnel costs is due to the recent departure of 1 social worker. Hours for this vacancy in FY12 will be covered by the remaining social worker and some use of contracted social services.

*Expenses* - The FY12 budget is increasing by \$10,675, compared to the FY11 budget. This budget restores some funding for general expense and senior outreach. The majority of the increase is for social work coverage to be paid for in FY12 as contract services.

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

### **MISSION OF THE DEPARTMENT**

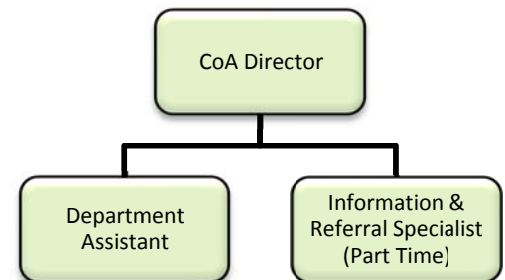
The mission of the Council on Aging (COA) is dedicated to serving the social, recreational, health and educational needs of older adults in the community. The Sudbury Senior Center has been a fully accredited center since December 2003, (one of only seven in Massachusetts).

### **DESCRIPTION OF SERVICES**

The Council on Aging supports programs at the Sudbury Senior Center, provides van services for elders and people with disabilities, serves as an information resource for seniors and their families, offers a wide variety of recreational and educational programs as well as health-related exercise, information, and nutrition, coordinates numerous volunteer services to elders in the community, and plays an advocacy role for seniors at the local, state, and federal level.

### **STAFFING (FTE's 2.40)**

The department currently consists of the Council on Aging Director, a full-time department assistant 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. In FY 2009 the Senior Center full time van driver's salary and benefit expenses were shifted to the new MWRTA account, as were the expenses of operating the van. With a grant from the Sudbury Foundation, the department also has the services of a Volunteer Coordinator 60 hours a month.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>COUNCIL ON AGING</b>				
Director	69,674	67,721	77,522	66,752
Clerical	39,046	41,573	43,527	44,782
Information/Reference	20,942	21,603	21,653	21,653
<b>Sub Total: Personal Services</b>	<b>129,662</b>	<b>130,897</b>	<b>142,702</b>	<b>133,187</b>
General Expense	4,202	3,404	4,000	6,000
Contracted Services	1,377	0	0	0
<b>Sub Total: Expenses</b>	<b>5,579</b>	<b>3,404</b>	<b>4,000</b>	<b>6,000</b>
<b>Total: Council on Aging</b>	<b>135,241</b>	<b>134,301</b>	<b>146,702</b>	<b>139,187</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is decreasing by \$9,515, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employees of this office will receive a 1% wage adjustment, as well as any step movement that might be due, as will the COA Director who is a member of the Supervisory Association in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. The overall decrease in personnel costs is due to the recent retirement of COA Director Kris Kiesel, and the hiring of our new Director, Deborah Galloway, starting at a lower starting salary on the appropriate salary grid.

*Expenses* – The FY12 budget is increasing by \$2,000, compared to the FY11 budget. This budget restores funding for general expenses to pre-FY09 levels. General expense for this department includes copier, paper, postage, fixtures and other miscellaneous program-related items.

## **HUMAN SERVICES: Veterans' Affairs**

### **MISSION OF THE OFFICE**

The Mission of the Veterans' Affairs office is to help address the financial and medical needs of Sudbury's veterans and their dependents. The Veteran Agent also provides information and support to family members of Service personnel current in the Armed Forces.

### **DESCRIPTION OF SERVICES**

The Agent assists veterans in applying for State and Federal services. The office also offers assistance and referrals in the areas of federal compensation and pensions, state and federal educational benefits, tax exemptions, annuities, home loans, counseling and job training. The Veterans Agent also serves as the Veterans' Graves Agent, and provides a coordinating and advisory role for the Town if there is a military casualty for a resident, as occurred in FY11, when 1<sup>st</sup>. Lt. Scott Milley was killed in action in Afghanistan.

### **STAFFING**

Staff consists of one Veteran's agent.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>VETERANS AFFAIRS</b>				
Veteran Agent	11,277	11,537	11,615	11,615
<b>Sub Total: Personal Services</b>	<b>11,277</b>	<b>11,537</b>	<b>11,615</b>	<b>11,615</b>
General Expense	181	137	900	900
Veteran's Grave Markers	984	876	900	900
Veteran's Benefits	2,754	3,274	4,000	4,000
<b>Sub Total: Expenses</b>	<b>3,919</b>	<b>4,288</b>	<b>5,800</b>	<b>5,800</b>
<b>Total: Veterans Affairs</b>	<b>15,196</b>	<b>15,825</b>	<b>17,415</b>	<b>17,415</b>

### **BUDGET ISSUES**

Level Services: This budget provides for the same level of part-time personnel and program expenses as the FY11 budget.

# Culture & Recreational Services



**Goodnow Library**

**Hosmer House**

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>CULTURE &amp; RECREATION</b>				
Goodnow Library	953,787	971,918	1,003,633	1,017,708
Recreation	118,468	132,729	138,190	142,643
Historical Commission	5,356	5,386	5,309	5,309
Historic Districts Commission	2,718	2,253	2,692	2,751
<b>Total Culture &amp; Recreation</b>	<b>1,080,329</b>	<b>1,112,286</b>	<b>1,149,824</b>	<b>1,168,411</b>
Personal Services	753,422	754,680	781,055	788,893
Expenses	326,907	357,606	368,769	379,518
<b>Total Culture &amp; Recreation</b>	<b>1,080,329</b>	<b>1,112,286</b>	<b>1,149,824</b>	<b>1,168,411</b>
Salary	750,244	752,141	765,452	775,068
Overtime	0	0	12,525	13,825
Other payroll-related compensation	3,178	2,540	3,078	0
	753,422	754,680	781,055	788,893

## CULTURE & RECREATION: Goodnow Library

### MISSION OF THE DEPARTMENT

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 that support 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.

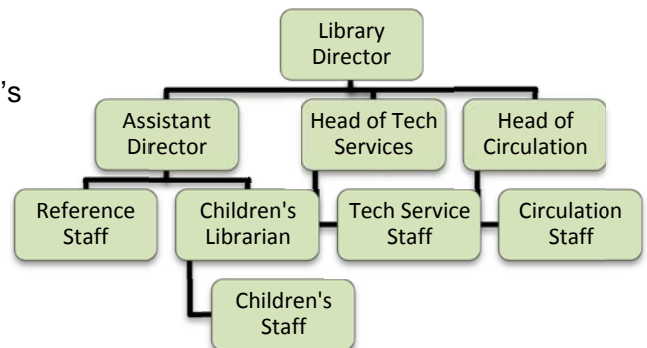
### DESCRIPTION OF SERVICES

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 and viewing to pursuing hobbies and cultural interests, use of library resources and activities is increasing for all ages. As a Formal Education Center 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.

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. Lastly, Goodnow is a thriving Community Center. The Library is used as a place for socializing, as a formal meeting center and for sharing experiences and ideas.

### STAFFING (FTE's 12.72)

Staffing consists of 4 full-time positions (Director, Assistant Director, Head of Circulation, and Children's Librarian), 22 adult part-time positions, 5 page positions (shelvers), and 22 volunteers. The Library is open Monday – Thursday 9 am to 9 pm; Friday & Saturday 9 am to 5 pm; and Sunday 2 pm – 5 pm. Statewide public library reports show that Goodnow remains one of the busiest and most cost effective libraries in Massachusetts – supporting exceptionally high circulation (355,000) with a relatively small staff (15 FTE). Its ratio of circulations per full time equivalency is among the highest. Staffing at Goodnow has 125 fewer staff hours per week) than the average staffing of comparable libraries – libraries serving similar communities (size and make-up) with especially high activity.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>GOODNOW LIBRARY</b>				
Library Director	92,409	94,223	97,055	82,368
Non-Clerical	541,351	568,499	573,795	595,480
Overtime	0	0	12,525	13,825
Sick Leave Buy Back	3,178	2,540	3,078	0
<b>Sub Total: Personal Services</b>	<b>636,938</b>	<b>665,262</b>	<b>686,453</b>	<b>691,673</b>
General Expense	8,429	7,049	8,500	8,600
Automation	43,919	42,716	42,000	43,560
Books and Materials	125,910	124,501	128,800	132,400
Maintenance	24,600	19,404	22,610	23,540
Utilities	77,110	74,282	79,370	80,570
Travel	226	97	400	270
Contracted Services	36,654	38,607	35,500	37,095
<b>Sub Total: Expenses</b>	<b>316,849</b>	<b>306,656</b>	<b>317,180</b>	<b>326,035</b>
<b>Total: Goodnow Library</b>	<b>953,787</b>	<b>971,918</b>	<b>1,003,633</b>	<b>1,017,708</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$5,220, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. The non-union employees of this office will receive a 1% wage adjustment, as well as any step movement that might be due, in exchange for agreeing to pay an additional 2.5% toward their health insurance premiums in FY12. The impending retirement of Library Director Bill Talentino means that we have projected hiring a new Director at a lower starting salary on the appropriate salary grid.

*Expenses* – The FY12 budget is increasing by \$8,855, compared to the FY11 budget. This request enables Goodnow to restore several key areas of operations to pre-FY09 levels and keep pace with inflation within contracted and maintenance services.



## 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. Additionally, 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 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 Park & 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. Major activity areas include Davis Field, Featherland Park, Frank G. Feeley Field, Cutting Field (Turf Field), LSHS-Community Field and the Haskell Recreation area. This division provides programs and activities that are safe as well as educational during the so-called non-learning hours. The Teen Center and Youth Programs are designed to safe and positive events for older teens and the teens use these activities to raise funds for charity.

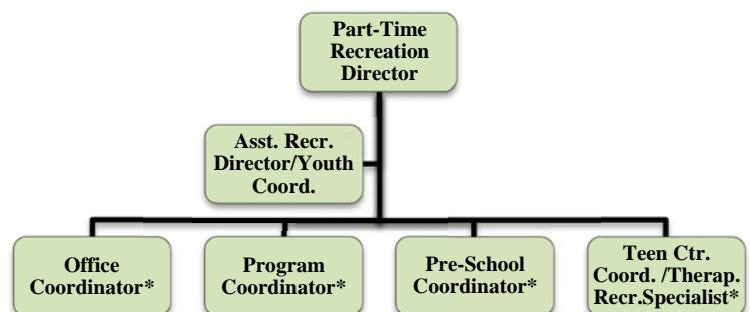
Program offerings include:

- Summer Camp
- Pre-school Pals
- After school programs
- Youth services and activities for teens
- Community service for all age groups
- Adaptive recreation, and Paralympics development recreational programs for children and adults

### STAFFING (FTE's 3.40)

\*denotes part or all of the position paid for by fee based revolving funds.

Staffing in this department consists of 3.40 FTE's supported by the General fund (tax levy): A halftime Recreation Director (shared with the Town of Wayland), an Assistant Recreation Director/Youth Coordinator, an office coordinator, and program coordinator. Other staff wages and benefits are paid completely or partially through



various revolving funds (outside the tax levy). These positions include a newly combined Teen Center coordinator/Therapeutic Recreation Specialist, a pre-school coordinator and other staff members, many of which are part-time positions that are paid by revolving funds. Currently, approximately half of the office coordinator and program coordinator's salary is also paid for by revolving funds thereby reducing expenses on the general tax levy.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>RECREATION</b>				
Recreation Director	28,133	0	0	0
Assistant Director/Youth Serv	0	49,308	49,814	52,484
Youth/Teen Coordinator	40,085	0	0	0
Non-Clerical	7,149	0	0	0
Program Coordinator	21,135	19,806	23,734	23,069
Clerical	17,419	18,136	18,517	19,202
<b>Sub Total: Personal Services</b>	<b>113,921</b>	<b>87,250</b>	<b>92,065</b>	<b>94,755</b>
General Expense	0	264	0	0
Recr. Director Contract Serv	3,580	45,000	46,125	47,888
Youth Services Expense	967	0	0	0
Clothing	0	215	0	0
<b>Sub Total: Expenses</b>	<b>4,547</b>	<b>45,479</b>	<b>46,125</b>	<b>47,888</b>
<b>Total: Recreation</b>	<b>118,468</b>	<b>132,729</b>	<b>138,190</b>	<b>142,643</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$2,690, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, will receive a 1% wage adjustment, as well as any step movements that might be due, in exchange for agreeing to pay 2.5% more toward their health insurance premium.

Expenses - The FY12 budget is increasing by \$1,763, compared to the FY11 budget. This covers the anticipated increase in contracted services.

## CULTURE & RECREATION: Historical Commission

### MISSION OF THE PROGRAM

The Historical Commission is responsible for oversight of all Town-owned historic properties including the Hosmer House, Loring Parsonage, Haynes-Garrison site, Revolutionary Training Field and the Revolutionary Cemetery in the Center of Town. The SHC works with the Town Manager, Planning Board, Building Department and DPW to implement efforts to maintain and protect these properties. The demolition by-law reviews and scenic road hearings also come under the domain of the Commission and Planning Board. In addition, the Commission maintains records for the Massachusetts Historical Commission and attends their presentations and educational programs.

### DESCRIPTION OF SERVICES

The Historical Commission plans and carries out a variety of activities to help the community of Sudbury enjoy the Hosmer House and other historic properties owned by the Town.

### STAFFING

The Commission receives no staffing from the Town. The volunteer Commission members do all budgets, goals, town report, financial recordings, etc. Manual labor is accomplished by the members or by hiring professional services. Hundreds of volunteer hours are put into the documentation, rentals, upkeep both inside and out of the properties. Boy Scout troops have attained their Eagle Badges by installing patios, walkways, fences and repairing foundations which has saved the town money and labor for such projects.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>HISTORICAL COMMISSION</b>				
General Expenses	5,356	5,386	5,309	5,309
<b>Sub Total: Expenses</b>	<b>5,356</b>	<b>5,386</b>	<b>5,309</b>	<b>5,309</b>
<b>Total: Historical Commission</b>	<b>5,356</b>	<b>5,386</b>	<b>5,309</b>	<b>5,309</b>

### BUDGET ISSUES

Level Services: This is a budget level funded, compared to the FY11 budget.

## 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 within the Selectmen's Office.

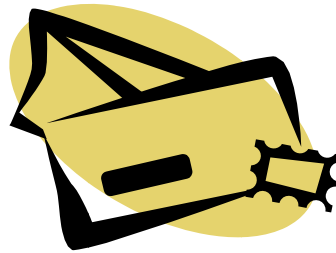
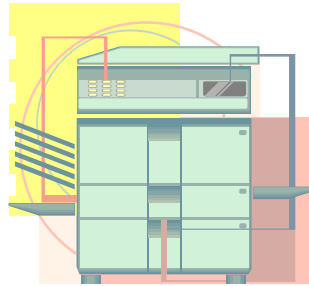
	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>HISTORIC DISTRICTS COMMISSION</b>				
Clerical	2,563	2,168	2,537	2,465
<b>Sub Total: Personal Services</b>	<b>2,563</b>	<b>2,168</b>	<b>2,537</b>	<b>2,465</b>
General Expenses	155	85	155	286
<b>Sub Total: Expenses</b>	<b>155</b>	<b>85</b>	<b>155</b>	<b>286</b>
<b>Total: Hist Dist Commission</b>	<b>2,718</b>	<b>2,253</b>	<b>2,692</b>	<b>2,751</b>

### BUDGET ISSUES

Level Services: *Personal Services* - This budget provides for the same level of part-time hours as the FY11 budget.

*Expenses* – The FY12 budget is increasing by \$59, compared to the FY11 budget. General expense includes the cost of publicizing and conducting hearings.

## Unclassified & Transfer Expense



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>Unclassified &amp; Transfers</b>				
Town-Wide Operating Expenses	113,643	106,619	142,100	142,100
Town Reserve Account	0	0	240,420	251,774
Salary Contingency Account	0	0	51,985	22,565
<b>Total Unclassified &amp; Transfers</b>	<b>113,643</b>	<b>106,619</b>	<b>434,505</b>	<b>416,439</b>

## UNCLASSIFIED – Town Wide Operating Expenses

### MISSION OF THE PROGRAM

There are many activities and responsibilities that benefit the entire Town. This budget provides a place to accommodate 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, annual audit fees, Town Meeting, Memorial Day and the July 4<sup>th</sup> parade. All spending from this budget requires the approval of the Town Manager.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>TOWN-WIDE OPERATING EXPENSES</b>				
Copier Supplies & Service	7,277	7,600	7,500	12,500
Postage	30,485	34,143	38,900	38,900
Town Audit Fees	43,000	30,000	48,500	48,500
Telephone	17,754	15,310	25,000	20,000
Town Report Printing	750	0	0	0
Town Meetings and Elections	8,677	13,866	16,500	16,500
Memorial Day	1,700	1,700	1,700	1,700
July 4th Celebration	4,000	4,000	4,000	4,000
<b>Total: Operating Expenses</b>	<b>113,643</b>	<b>106,619</b>	<b>142,100</b>	<b>142,100</b>

### BUDGET ISSUES

Level Services: The total budget for FY12 is level funded, compared to the FY11 budget. Additional funds for copier supplies and maintenance will be covered by expected savings for system-wide telephone services.

## **MISSION OF THE PROGRAM**

The Town government has limited ability to move funds around should unforeseen needs arise during the fiscal year. The two transfer accounts provided for here provide the Town side of Sudbury's 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.

As always there are risks the Town runs in making various budget decisions, and it is in this Reserve Fund we set aside funding to cover as many of these risks as possible. These potential areas of additional funding include:

1. **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. In each of the last three fiscal years, actual snow and ice removal costs has exceeded the initial appropriation by an average of \$201,000. Most of the funding for these excess costs came from the Reserve Fund.
2. **Legal expenses:** Funding for the law budget is set at a minimum level, but it is likely the Town either will be sued or will initiate legal proceedings to protect its rights and to defend the decisions of its Boards and Commissions.
3. **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.
4. **Veterans' benefits:** The Town is required to pay for such benefits, but at budget preparation time, we do not know with certainty 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. 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.

## Salary Contingency Fund

The Salary Contingency Fund holds funding for salary increases whenever contracts with collective bargaining groups are being negotiated or contract issues arise, as well as funding for any increases which non-unionized employees might receive but which has not been determined as of the date that the budget is being prepared.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>Transfer Accounts</b>				
Reserve Fund	0	0	240,420	251,774
Salary Contingency	0	0	51,985	22,565
<b>Total Transfer Accounts</b>	<b>0</b>	<b>0</b>	<b>292,405</b>	<b>274,339</b>

\*prior year actuals are zero since these balances were already transferred to other budget line items or any remainder closed out to Free Cash. FY11 reflects unused balance as of the time of publication of this document.

## BUDGET ISSUES

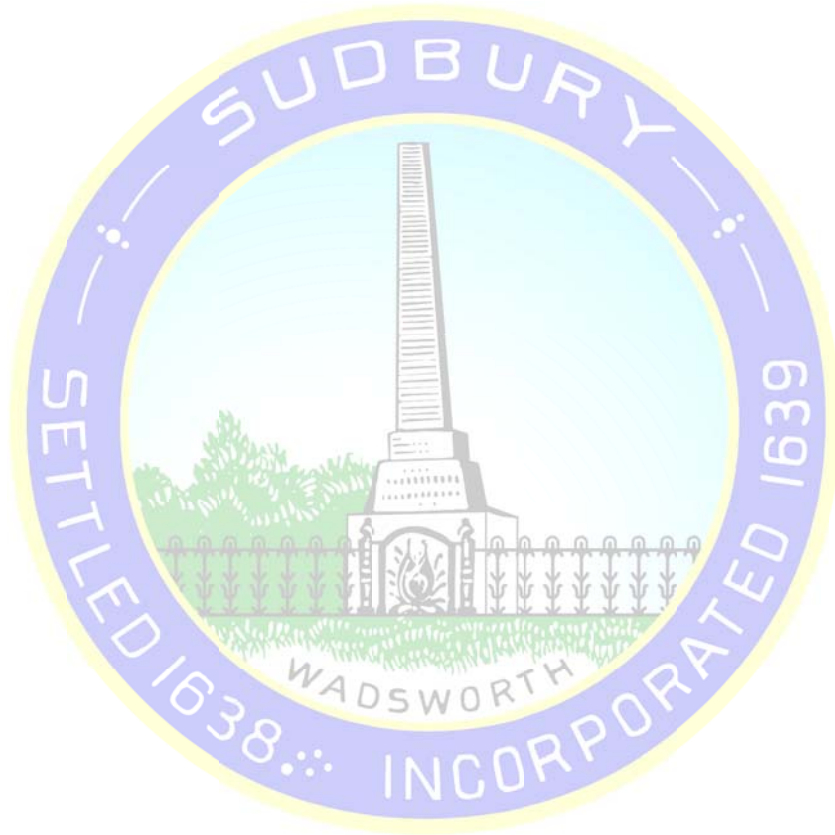
Level Services: *Reserve Fund* - The FY12 budget is increasing by \$11,354, compared to the FY11 budget. The additional funding is to provide the Town with sufficient flexibility in case of emergency or unforeseen financial exposure.

*Salary Contingency* - The FY12 budget is decreasing by \$29,420, compared to the FY11 budget. FY12 marks the final year for the latest cycle of 3-year contracts for *most* town collective bargaining groups. Consequently the amount of contingency funding may be reduced in comparison to prior budget cycles when major union negotiations were still underway.



## Section Three

# SHARED PROGRAMS & COSTS



# SHARED PROGRAMS & COSTS



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>SHARED PROGRAMS &amp; COSTS</b>				
Debt Service	6,741,131	6,568,173	6,417,501	6,076,932
Town/SPS Benefits & Insurance	10,854,235	10,169,076	10,660,033	11,310,814
Cherry Sheet Charges & Offsets	205,076	196,858	244,548	250,000
Snow/Ice Deficits	69,499	0	100,000	100,000
Abatements/Exemptions	708,949	533,388	400,000	400,000
<b>Total Shared Programs &amp; Costs</b>	<b>18,578,890</b>	<b>17,467,494</b>	<b>17,822,082</b>	<b>18,137,746</b>

## **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 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, 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 included in the Town's As Appropriated Budget Document.

### **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. This designation allows for the value of such debt service payments (net of any premiums or State reimbursements) to be added to the levy limit for the life of the borrowings/bond issues.

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. According to the most recent statistics, the Town of Sudbury's EQV for 2010 was \$4,256,033,800. The normal debt limit (of 5% EQV) is therefore, \$212,801,690. As of June 30, 2010, the Town's permanent debt outstanding was \$36,205,000 (including CPA debt which is also guaranteed by the Town) or less than 17% 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, 2010, the Town had \$20,596,000 in long-term debt “outside” the debt limit all of which pertains to various school building projects for K-8.

The Town reached a high in terms of debt service payments in FY03 due to the combination of outstanding bond issues for school construction, land acquisition, and various other projects. Since then however, debt has leveled off and is now declining as several Town-related bond issues have been paid in full. Additionally, the Town 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. The School District recently issued the remaining long-term debt for the new building complex. The total debt service for this project has leveled off and is expected to decline starting in FY09. In turn, the Town may expect decreases in their LS assessment for LS debt with the largest reductions starting in FY09 and dropping off significantly in FY2015 through completion in FY2021. It should be noted that the Town’s portion of LS debt service is also considered exempt debt for purposes of tax levy calculation.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>DEBT SERVICE</b>				
Short-term Loan Interest	-	7,620	-	-
Long Term Bond Int.	1,277,060	1,151,604	1,025,354	893,860
Long Term Bond Principal	3,070,000	3,110,000	3,155,000	2,990,000
LSRHS Debt Service, Sudbury Portion	2,394,071	2,298,949	2,237,147	2,193,072
<b>Total: Debt Service</b>	<b>6,741,131</b>	<b>6,568,173</b>	<b>6,417,501</b>	<b>6,076,932</b>
<b>NON-EXEMPT DEBT/ADJUSTMENTS</b>				
Non-Exempt Debt Service	-	(7,620)	-	-
Premium on Bonds	(8,408)	(7,007)	(5,605)	(3,737)
SBAB Debt Reimbursement	(1,702,596)	(1,702,596)	(1,702,596)	(1,702,596)
<b>Sub-Total: Non-exempt debt adjustments</b>	<b>(1,711,004)</b>	<b>(1,717,223)</b>	<b>(1,708,201)</b>	<b>(1,706,333)</b>
<b>Total Exempt Debt to be raised</b>	<b>5,030,127</b>	<b>4,850,950</b>	<b>4,709,300</b>	<b>4,370,599</b>

## **BUDGET ISSUES**

Level Services: The FY12 budget for net exempt debt is decreasing by \$338,701, compared to the FY11 budget. Debt service including Sudbury's share of LSRHS debt is expected to decline dramatically in the next few years barring any new bonding requirements for large-scale building improvements, land purchases or equipment acquisitions.

## 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 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 assessment from the Middlesex Retirement System. This budget category also includes property and liability coverage for all Town owned property as well as all Town officials, elected and appointed.

### BENEFITS SUMMARY BY TYPE

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>BENEFITS &amp; INSURANCE</b>				
Workers' Compensation	27,009	25,090	30,690	41,055
Unemployment Compensation	52,610	41,730	46,738	86,189
Medicare Tax	413,942	421,241	487,166	487,166
Life Insurance	3,700	3,620	5,600	4,343
Employee Medical Premiums	6,747,497	5,977,403	6,093,685	6,466,312
Retiree Medical Premiums/ OPEB	771,852	782,694	883,488	1,025,847
Retirement Assessment	2,621,713	2,717,879	2,851,124	2,961,642
Property/Liab. Insurance	215,912	199,420	275,822	284,096
Benefits Offsets	-	-	(14,280)	(45,836)
<b>Total: Employee Benefits</b>	<b>10,854,235</b>	<b>10,169,076</b>	<b>10,660,033</b>	<b>11,310,814</b>

## BENEFITS DETAILS – TOWN & SUDBURY PUBLIC SCHOOLS

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>EMPLOYEE BENEFITS</b>				
Workers' Compensation	<b>27,009</b>	<b>25,090</b>	<b>30,690</b>	<b>41,055</b>
Town:	13,505	12,545	15,345	13,138
School:	13,505	12,545	15,345	27,917
Unemploy. Compensation	<b>52,610</b>	<b>41,730</b>	<b>46,738</b>	<b>86,189</b>
Town:	10,522	8,346	9,348	17,238
School:	42,088	33,384	37,390	68,951
Medicare Tax	<b>413,942</b>	<b>421,241</b>	<b>487,166</b>	<b>487,166</b>
Town:	120,043	130,585	151,022	146,150
School:	293,899	290,656	336,144	341,016
Life Insurance	<b>3,700</b>	<b>3,620</b>	<b>5,600</b>	<b>4,343</b>
Town:	1,073	1,194	1,848	1,650
School:	2,627	2,425	3,752	2,693
Employee Medical Premiums	<b>6,747,497</b>	<b>5,977,403</b>	<b>6,079,405</b>	<b>6,420,476</b>
Town:	2,115,203	1,868,155	1,894,310	2,144,760
Town Offsets:	-		(14,280)	(45,836)
School:	4,632,294	4,109,248	4,199,375	4,321,552
Retiree Medical Premiums/ OPEB	<b>771,852</b>	<b>782,694</b>	<b>883,488</b>	<b>1,025,847</b>
Town:	290,988	295,076	334,731	386,993
School:	480,864	487,618	548,757	638,854
Retirement Assessment	<b>2,621,713</b>	<b>2,717,879</b>	<b>2,851,124</b>	<b>2,961,642</b>
Town:	1,494,376	1,549,191	1,679,670	1,704,598
School:	1,127,337	1,168,688	1,171,454	1,257,044
Property/Liab. Insurance	<b>215,912</b>	<b>199,420</b>	<b>275,822</b>	<b>284,096</b>
Town:	107,956	99,710	137,911	142,048
School:	107,956	99,710	137,911	142,048
<b>Total: Employee Benefits</b>	<b>10,854,235</b>	<b>10,169,076</b>	<b>10,660,033</b>	<b>11,310,814</b>
Town:	4,153,667	3,964,802	4,224,185	4,556,575
Town Offset	0	0	(14,280)	(45,836)
School:	6,700,568	6,204,274	6,450,128	6,800,075

## BUDGET ISSUES

Level Services: Worker's Compensation – The FY12 budget is increasing by \$10,365, compared to the FY11 budget. This increase reflects recent claims history and cost of this insurance coverage.

Life Insurance – The FY12 budget is decreasing by \$1,257 compared to the FY11 budget. This slight decrease slightly is based on anticipated enrollment levels and cost of this insurance coverage for the coming year.

Unemployment – The FY12 budget is increasing by \$39,451 compared to the FY11 budget. Actual costs have continued to exceed budget during the past couple of years due to necessary reductions in workforce and mandated extensions for unemployment benefits.

Medicare Tax – The FY12 budget is level funded, compared to the FY11 budget. Annual increases in this tax liability have been much greater in previous years, as long-term employees (pre-dating this federal tax mandate) were being replaced by new employees whose wages are fully subject to this tax. This budget may continue to fluctuate in the future depending on further replacements and staffing practices.

Employee Medical Insurance Premiums – The FY12 expected medical insurance costs (for premiums) for Town and Schools combined is expected to increase by \$372,627 or 6.1%, compared to FY11. With this moderate increase (as compared to many other self-funded and premium based programs), the total expected cost is only slightly higher than our FY09 actual results. This resetting in benefit costs was achieved by dramatic changes successfully negotiated during FY10 in the Town's group health insurance program.

Retiree Medical Insurance Premiums (part of OPEB) – For the first time for budgeting presentation purposes, **retiree** medical insurance premium costs have been broken out separately. We have restated this part of the benefits budget to provide a recent history of growth in retiree medical costs previously reported with active employee programs. The total FY12 retiree medical insurance costs (for premiums) for Town and School combined is expected to be \$1,025,847. It is important to note that this line item currently reflects only the “**pay as you go**” costs of providing medical coverage to all (currently) retired employees. It does not address the other much larger part of OPEB (Other Post-Employment Benefits) known as the liability (the actuarial-based calculations for all future costs associated with providing benefits for all active employees as well as current retirees. OPEB liabilities and funding requirements are addressed elsewhere in both the Town's annual financial statements and As Appropriated Budget documentation (see the Town's website to access online versions of these materials).

Health Insurance Reserves – This benefits category has been used in the past to segregate potential health insurance savings that might be achieved during the year and thus available for transfer to other areas of the operating budget with approval by the Finance Committee. Otherwise, transfers from unclassified benefits may only be done through Town Meeting as budget adjustments. Being able to transfer from this reserve line into other uses during the year may save jobs, help fund contract negotiations or otherwise restore spending in much needed areas of operations such as maintenance,



equipment, building repairs, training or contracted services, to name just a few. Current requirements are zero however the Town and Schools may still opt to use this budget item for FY12 (see later budget documents for any revisions).

*Retirement System* - The FY12 budget is increasing by \$122,234 or approximately 4%, compared to the FY11 budget. This increase is attributable to an increase in our **assessment** from the Middlesex Retirement System. The Town's assessment is calculated by their actuarial consultant to cover pension costs for all Town and Sudbury Public School retirees covered by this retirement system, and also to amortize over time the previous unfunded pension liability created by insufficient contributions by member units over a number of years.

*Property/Liability Insurance* - The FY12 budget is increasing by \$8,274, compared to the FY11 budget. This 3% increase is due to the general property and liability insurance market, adjustments to the value of Town and SPS properties and facilities, and higher claims trends in fire and police accident coverage. Because fire and police personnel are not eligible under Massachusetts law for regular worker's compensation coverage, a separate insurance policy with premiums based largely on claims experience is purchased to cover these personnel for injuries incurred in the line of duty.

## 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.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>STABILIZATION FUND</b>				
Additions to Fund	0	0	0	0
<b>Total Stabilization Fund</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### BUDGET ISSUES

Level Services: There are no known plans to add to the Stabilization Fund in FY12.

## OTHER CHARGES TO BE RAISED

### 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 broken down between the MBTA assessment (Ch. 161A) and Regional Transit Authority (MWRTA). 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 amounts are 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 un-appropriated 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.

**Snow & Ice Deficit** - 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, 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.

**Abatements & Exemptions** - 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.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>Other amounts to be raised</b>				
Cherry Sheet Assessments	167,313	164,445	211,556	217,008
Cherry Sheet Offsets	37,763	32,413	32,992	32,992
Abatements & Exemptions	708,949	533,388	400,000	400,000
Recap. Snow & Ice Deficits	69,499	0	100,000	100,000
<b>Total Other Charges</b>	<b>983,524</b>	<b>730,246</b>	<b>744,548</b>	<b>750,000</b>

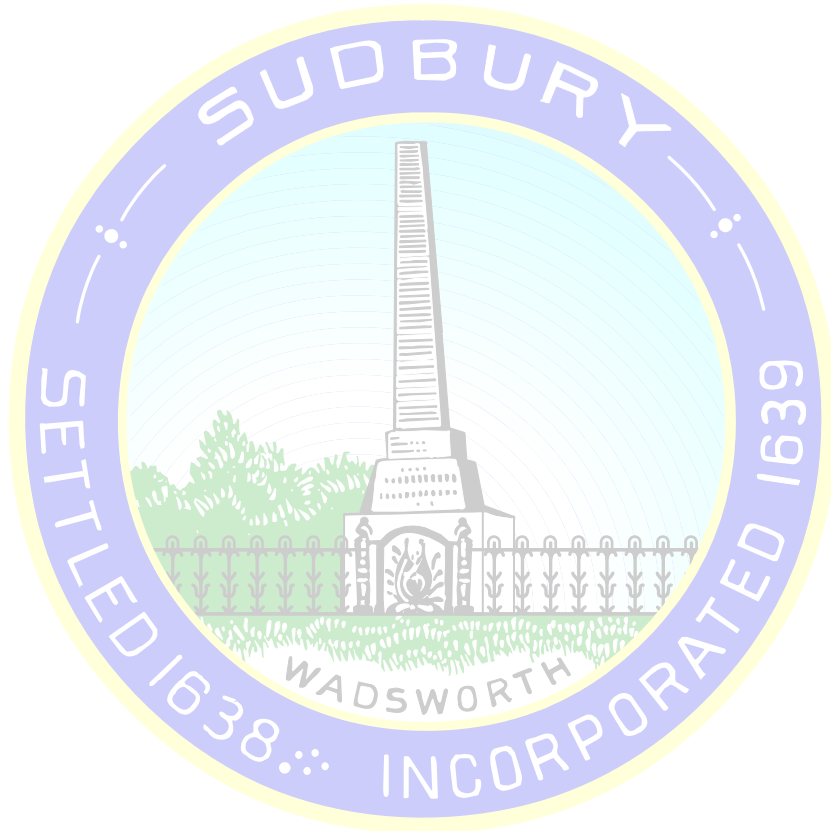
## **BUDGET ISSUES**

Level Services: The FY12 budget for all other charges to be raised is level-funded from FY11, with the exception of a slight increase for Cherry Sheet assessments. Actual charges and offsets will likely differ from current estimates. Adjustments to Cherry Sheet items may be made when the Governor's budget is released. It is difficult to predict what actual abatements and exemptions will be in a given year. The same can be said for snow and ice costs from one winter to the next. However, based on recent historical trends, the Town predicts all of these items to stay in line with FY11.



## Section Four

# ENTERPRISE FUNDS



# ENTERPRISE FUNDS



	FY09	FY10	FY11	FY12	FY12
	Actual	Actual	Appropriated	Level Services	Dept. Request
<b>ENTERPRISE FUND EXPENDITURES</b>					
Transfer Station	263,368	256,534	271,437	290,389	290,389
Pool	438,924	455,118	489,868	517,230	517,230
Recreation Field Maintenance	0	113,606	221,497	285,961	285,961
<b>Total Enterprises (Direct)</b>	<b>702,292</b>	<b>825,257</b>	<b>982,802</b>	<b>1,093,580</b>	<b>1,093,580</b>
	FY09	FY10	FY11	FY12	FY12
	Actual	Actual	Appropriated	Level Services	Dept. Request
<b>ENTERPRISE FUND REVENUES</b>					
Transfer Station	316,432	375,277	301,032	330,000	330,000
Pool	457,842	480,692	489,868	511,831	511,831
Recreation Field Maintenance	0	170,493	221,497	297,500	297,500
<b>Total Enterprises Revenues</b>	<b>774,274</b>	<b>1,026,461</b>	<b>1,012,397</b>	<b>1,139,331</b>	<b>1,139,331</b>

## ENTERPRISE FUNDS: Transfer Station/Recycling Center

### MISSION OF THE ENTERPRISE

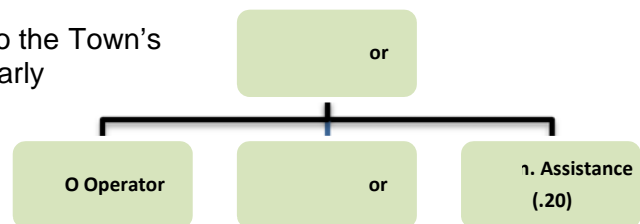
The Enterprise mission is to operate a secure, safe and environmentally friendly Transfer Facility for the residents of Sudbury to properly dispose of and/or recycle common household items and non-hazardous waste. The station provides excellent recycling opportunities in which residents can exercise environmental stewardship of resource's and help reduce the bulk amount of trash.

### 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, Mass. 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 (FTE's 2.20)

Transfer Station/Recycling Center staff report to the Town's DPW Director. There are two employees regularly assigned to the Transfer Station operations. Part-time administrative duties are also provided by a DPW employee.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>TRANSFER STATION ENTERPRISE FUND</b>				
Non-Clerical	92,183	86,826	93,776	98,708
Overtime	5,282	7,300	7,000	7,000
Stipends	0	0	4,095	4,095
Clerical	7,562	8,269	8,466	9,086
<b>Sub Total: Personal Services</b>	<b>105,027</b>	<b>102,396</b>	<b>113,337</b>	<b>118,889</b>
General Expense	28,356	15,253	19,000	19,000
Maintenance	37,292	13,547	27,600	25,000
Hauling & Disposal	76,839	104,017	90,000	106,000
Resource Recovery	15,854	21,321	21,500	21,500
<b>Sub Total: Expenses</b>	<b>158,341</b>	<b>154,138</b>	<b>158,100</b>	<b>171,500</b>
<b>Direct Costs (appropriated)</b>	<b>263,368</b>	<b>256,534</b>	<b>271,437</b>	<b>290,389</b>
INDIRECT COSTS: (Not Appropriated)				
Benefits/Insurance	30,912	30,953	29,595	33,146
<b>Indirect Costs*</b>	<b>30,912</b>	<b>30,953</b>	<b>29,595</b>	<b>33,146</b>
<b>TOTAL: TRANSFER STATION ENTERPRISE</b>	<b>294,280</b>	<b>287,487</b>	<b>301,032</b>	<b>323,536</b>
Transfer Station Receipts	290,000	328,482	250,000	330,000
Retained Earnings Used	26,432	46,795	51,032	0
Total Revenue	316,432	375,277	301,032	330,000
Surplus/Deficit	22,152	87,790	0	6,464

\*Appropriated in General Fund

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$5,552, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. Most staff in this department are members of the public works (AFL-CIO) union, and they will receive any step movement that might be due.

*Expenses* – The FY12 budget is increasing by \$16,951, compared to the FY11 budget. This budget includes \$33,146 of indirect costs for benefits, which are paid for by the Enterprise. Hauling and disposal costs are expected to increase in FY12.



## ENTERPRISE FUNDS: Atkinson Pool

### MISSION OF THE OFFICE

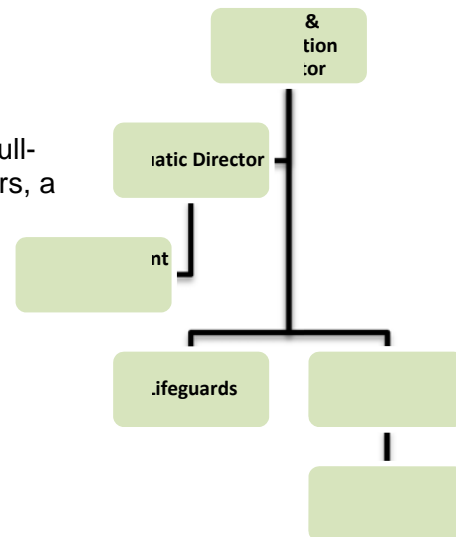
The mission of the Atkinson Pool is to provide aquatic activities, fitness swimming, and leisure services to the public. To enhance the quality of life for the Town of Sudbury residents by providing clean, safe and attractive aquatic facility that promote a strong sense of community.

### 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, therapeutic use, 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 other community teams such as Wayland, Framingham, Chelmsford, Westford, and the Bromfield school swimming and diving teams.

### STAFFING (FTE's 10.18)

Atkinson Pool staff report to the Town's Park and Recreation Director. The department consists of a full-time aquatic director, two full-time aquatic supervisors, a head lifeguard and many aquatic staff, mostly part-time, who are paid out of the Enterprise Fund. Part-time administrative duties are also provided by a Park & Recreation employee.



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>POOL ENTERPRISE FUND</b>				
Non-Clerical	144,856	152,684	159,762	165,280
Head Lifeguards	34,695	35,124	36,792	37,868
Overtime	254	529	1,293	800
Clerical	17,565	17,791	18,317	18,848
Part Time Supervisors	6,296	5,712	8,092	8,092
Receptionists	22,112	21,045	24,143	24,143
WSI Lifeguards	54,041	55,975	65,644	65,644
Sick Leave Buyback		289		730
Instructors	11,090	11,367	12,825	12,825
<b>Sub Total: Personal Services</b>	<b>290,909</b>	<b>300,516</b>	<b>326,868</b>	<b>334,230</b>
General Expense	14,602	9,754	10,000	33,000
Utilities	87,762	91,871	97,000	97,000
Maintenance	40,002	49,210	46,000	23,000
Programs	5,649	3,767	6,000	6,000
Equipment	0	0	4,000	4,000
<b>Sub Total: Expenses</b>	<b>148,015</b>	<b>154,602</b>	<b>163,000</b>	<b>163,000</b>
Building improvements	0	0	0	20,000
<b>Sub Total: Capital Expenses</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>20,000</b>
Direct Costs (appropriated)	<b>438,924</b>	<b>455,118</b>	<b>489,868</b>	<b>517,230</b>
INDIRECT COSTS: (Not Appropriated)				
Insurance & Benefits	65,530	61,905	55,841	62,542
Indirect Costs*	<b>65,530</b>	<b>61,905</b>	<b>55,841</b>	<b>62,542</b>
<b>TOTAL: POOL ENTERPRISE</b>	<b>504,454</b>	<b>517,023</b>	<b>545,709</b>	<b>579,772</b>
Pool Receipts	440,000	464,100	460,000	480,000
Retained Earnings Used	17,842	16,592	29,868	37,230
Total Revenue	457,842	480,692	489,868	517,230
Amounts to be raised in tax levy	(46,612)	(36,331)	(55,841)	(62,542)
	0		0	
*Appropriated within Benefits Budget				

## **BUDGET ISSUES**

Level Services: *Personal Services* - The FY12 budget is increasing by \$7,362, compared to the FY11 budget. This budget provides for the same level of personnel as the FY11 budget. All non-union employees of the Town, including all employees of this office, are budgeted to receive a 1% wage adjustment In exchange for paying 2.5% more of the health insurance premiums.

*Expenses* – The FY12 budget is increasing by \$26,701, compared to the FY11 budget. This budget of includes \$62,542 of indirect costs for benefits, which are paid for by the tax levy. All other expenses are level funded with the exception of \$20,000 added for the Enterprise's share of a building improvements project scheduled to be completed in the summer.

<b>ENTERPRISE FUNDS: Recreation Field Maintenance</b>
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**MISSION OF THE OFFICE**

The mission of the Enterprise is to insure the availability of adequate staffing and resources to preserve the Town's investment in its recreational and playing fields. To maintain quality recreation facilities, programs and services for our citizens.

**DESCRIPTION OF SERVICES**

The Enterprise provides repair and maintenance services for all public recreation fields. This includes mowing, seeding, turf repair, field lining, and other care required to make the fields safe and presentable for use. This enterprise fund replaced a previously existing revolving fund, which is also a mechanism for running a fee for service town program.

**STAFFING (FTE's .58)**

Currently, the Enterprise does not have any permanent full-time employees. Instead some personnel costs are to be allocated from the Town's Parks & Grounds department, on a seasonal basis. In the future, one part time employee may be hired to manage the scheduling of field usage. In the meantime, all scheduling continues to be done by personnel in the Recreation Department.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>RECREATION FIELD MAINTENANCE ENTERPRISE FUND</b>				
Non-Clerical <sup>1</sup>	0	0	52,967	108,918
Summer Help	0	7,383	5,130	11,000
<b>Sub Total: Personal Services</b>	<b>0</b>	<b>7,383</b>	<b>58,097</b>	<b>119,918</b>
Field Maintenance	0	57,545	90,000	75,000
Park Maintenance	0	24,790	19,000	30,000
Utilities	0	13,138	41,000	20,000
Office Expense	0	0	1,500	1,500
General Expense	0	10,750	7,000	4,500
<b>Sub Total: Expenses</b>	<b>0</b>	<b>106,223</b>	<b>158,500</b>	<b>131,000</b>
Capital Expense	0	0	4,900	4,561
<b>Sub Total: Capital Expenses</b>	<b>0</b>	<b>0</b>	<b>4,900</b>	<b>4,561</b>
<b>Direct Costs (appropriated)</b>	<b>0</b>	<b>113,606</b>	<b>221,497</b>	<b>255,479</b>
INDIRECT COSTS: (Not Appropriated)				
Insurance & Benefits	0	0	0	30,482
Indirect Costs*	<b>0</b>	<b>0</b>	<b>0</b>	<b>30,482</b>
<b>TOTAL: RECR FIELD MAINT ENTRP</b>	<b>0</b>	<b>113,606</b>	<b>221,497</b>	<b>285,961</b>
User Fees Receipts	0	160,493	221,497	297,500
Transfers In	0	10,000	0	0
Total Revenue	0	170,493	221,497	297,500
Surplus/Deficit	0	56,887	0	11,539
	0			
*Appropriated in General Fund				

## BUDGET ISSUES

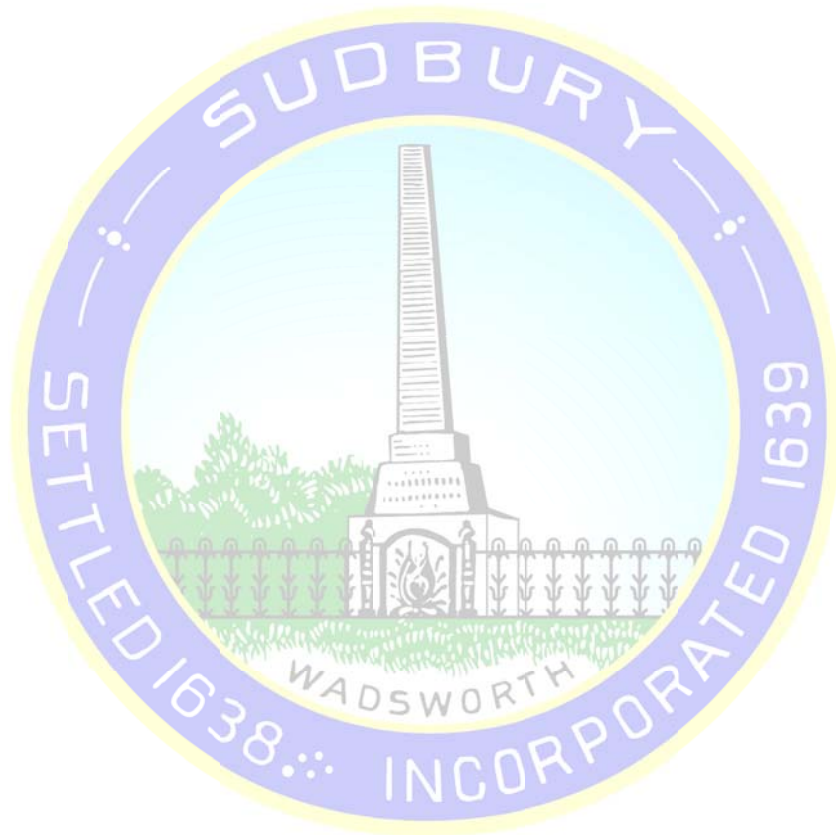
Level Services: *Personal Services* - The FY12 budget is increasing by \$61,821, compared to the FY11 budget. This budget provides for an increase in summer help. The majority of the increase however relates to the allocation of approximately 50% of Parks & Grounds non-clerical wages (representing the work done by DPW equipment operators to maintain all recreational fields on a seasonal basis).

*Expenses* – The FY12 budget is increasing by \$2,643, compared to the FY11 budget. This budget includes several reductions from the FY11 budget for field maintenance expenses. These changes reflect revisions based on the Enterprise's first full year of

operations rather than any anticipated reductions in service levels. These anticipated cost savings will be redirected to pay for approximately 50% of health benefits costs for those DPW employees assigned to field maintenance on a seasonal basis.

## Section Five

# CAPITAL INVESTMENT BUDGET



# CAPITAL INVESTMENT BUDGET



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>Capital &amp; Capital Articles</b>				
CIPC Items	513,042	523,383	529,054	547,678
<b>Total Capital &amp; Articles</b>	<b>513,042</b>	<b>523,383</b>	<b>529,054</b>	<b>547,678</b>



## CAPITAL BUDGET

### 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 acquire, maintain and replace 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 Town's Capital Improvement Planning Committee facilitates the capital budgeting process. A **capital expenditure** is defined as major, non-recurring costs 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. 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.

### STAFFING (FTE's 0)

While the Town's Finance Director is an ex-officio member of the Capital Improvement Planning Committee, the Town's Assistant Town Manager provides technical advice and support to the committee. The committee consists of seven voting members. Once projects have been approved, Town staff works with Town Counsel to initiate the public bidding process, secure contracts and oversee purchase or implementation to completion. Sudbury's nine-member Permanent Building Committee has general supervision over the design and construction of all public buildings, including the authority to employ professional assistance and, subject to specific authorization by the Town, to enter into contracts on behalf of the Town for the preparation of construction plans and specifications and, for the construction of buildings and other structures. All such plans and specifications are developed in conjunction with and subject to the approval of the appropriate committee, board or department head concerned.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>Capital</b>				
Town Buildings	109,500	70,000	116,771	68,338
General Government	12,200	22,622	11,955	0
Public Safety	21,400	25,000	10,000	72,396
Public Works	354,942	325,761	298,328	316,944
Culture & Recreation	15,000	80,000	42,000	0
Sudbury Public Schools	0	0	50,000	90,000
<b>Total: Operating Expenses</b>	<b>513,042</b>	<b>523,383</b>	<b>529,054</b>	<b>547,678</b>

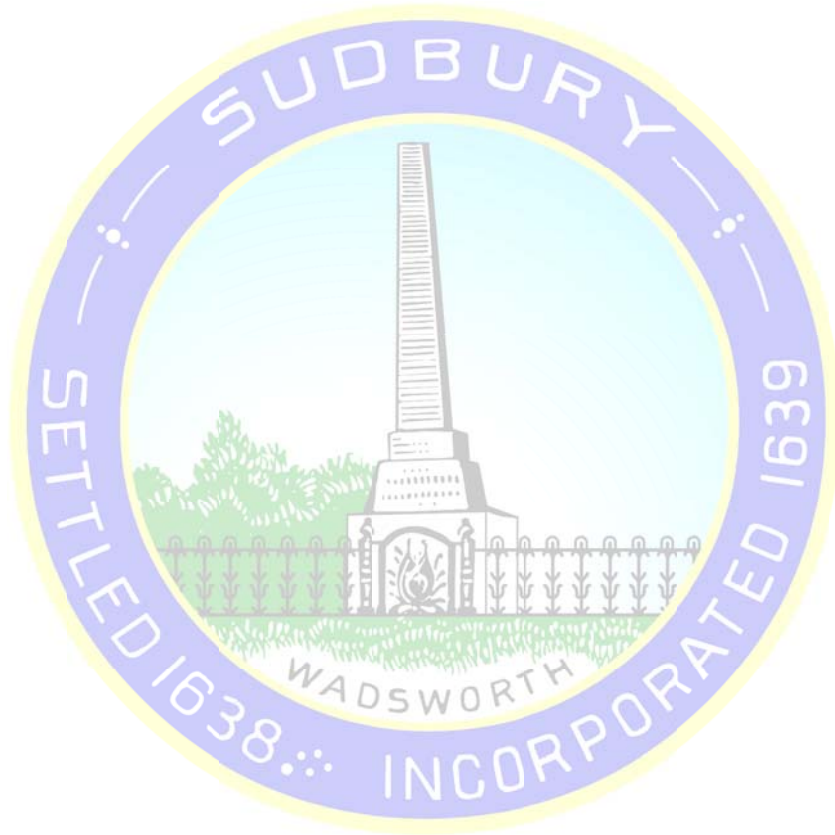
<u>Division</u>	<u>Description</u>	<u>Amount</u>
Parks & Grounds	Landscape Tractor w/ Bucket	4,560
Streets & Roads	On-going Highway Equipment Leases	256,894
Building	Various Building Improvements	68,338
Building	Pickup Truck	22,396
Fire	Car 3 Replacement	40,000
Fire	Div of Occupational Safety Listed Items	10,000
Parks & Grounds	1 Ton Dump 4x4 with Plow (Unit #PR-2)	8,700
SPS	Nixon Addressable Fire Alarm Panel & Devices	90,000
Streets & Roads	10 Wheel Dump Truck (Unit 10)	36,290
Streets & Roads	1 Ton Pick-Up Truck (Unit 37)	10,500
		<u>547,678</u>

## BUDGET ISSUES

Level Services: The FY12 budget is increasing by \$18,624, compared to the FY11 budget. Project costs range from new annual lease payments of approximately \$4,560 to building improvement items of \$68,338. As in previous years, the majority of capital dollars will go towards the ongoing leases of equipment. There is also an allotment of \$90,000 to upgrade the Nixon school's fire alarm system with addressable panel and devices. The items included in this budget are to be paid for by the regular operating budget. Capital projects that require permanent bonding or may be paid for by other funding (e.g. CPA surcharge revenues, grants, or gifts) will be addressed separately for budgeting purposes and/or at Town Meeting for authorization.

# Section Six

## SUDBURY PUBLIC SCHOOLS



## SUDBURY PUBLIC SCHOOLS

### MISSION OF THE SUDBURY PUBLIC SCHOOLS

The Sudbury Public Schools strive to enable all students to reach their intellectual and personal potential. The school system, in partnership with families and the community, will work with integrity and respect to realize the shared vision of enabling students to become life-long learners and effective contributors to society.

### Core Values

- Enhance the learning and teaching processes to enable and inspire students to achieve their potential
- Actively promote personal responsibility and integrity
- Seek and promote opportunities to advance equity
- Cultivate a life-long commitment to community

### DESCRIPTION OF SERVICES

Sudbury Public Schools District (K-8) encompasses the Ephraim Curtis Middle School and four elementary learning facilities – Josiah Haynes, Israel Loring, General John Nixon and Peter Noyes Elementary Schools. Each school represents a dynamic community of teachers and learners, which invites and needs student involvement. In addition to a core curriculum of Mathematics, English and Science, a student's quest for knowledge is enriched by music, art, drama, world languages, physical education, technology, family-consumer arts and research skills development. All schools offer excellent library and technology resources. Students can take part in after-school athletics as well as activities like computer club, Science Olympiad, yearbook, Theatre Troupe, and others. These are only a few ways for students to learn and practice sportsmanship, cooperative task accomplishment, and learn new lifelong skills.

### **STAFFING: (FTE's 385.97)**

Staffing consists of the following:

	Actual	Actual	Budgeted
	FY2010	FY2011	FY2012
	<u>FTE</u>	<u>FTE</u>	<u>FTE</u>
System Administration	12.10	14.00	14.00
Elementary Instruction	154.82	155.83	151.83
Middle School Instruction	78.38	78.38	77.78
Curriculum, Library, Media	7.00	7.00	7.00
PS/Special Education Instruction	103.20	100.50	100.50
Health & Transportation	21.81	19.86	19.86
Plant Maintenance	16.00	15.00	15.00
Other			
	393.31	390.57	385.97

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>SUDBURY PUBLIC SCHOOLS</b>				
Sudbury Public Schools	<b>26,331,604</b>	<b>27,815,697</b>	30,685,207	31,222,963
Offsets (incl. METCO)			(2,480,863)	(2,506,335)
Sudbury Public Schools	<b>26,331,604</b>	<b>27,815,697</b>	<b>28,204,344</b>	<b>28,716,628</b>
Add: Benefits & Insurance	6,700,568	6,204,274	6,450,128	6,800,075
<b>Total: Sudbury Public Schools</b>	<b>33,032,172</b>	<b>34,019,971</b>	<b>34,654,472</b>	<b>35,516,703</b>

<b>Sudbury Public Schools</b>		<b>FY2009</b>	<b>FY2010</b>	<b>FY2011</b>	<b>FY2012</b>
		<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Service</b>
<b>Summary - Salaries</b>					
System Administration		757,512	756,778	893,059	910,503
Elementary Instruction		8,735,024	8,867,186	9,382,476	9,783,462
Middle School Instruction		4,831,072	4,914,598	4,980,436	5,152,543
Curriculum, Library, Media		548,011	465,558	529,672	529,363
PS/Special Education Instruction		4,267,181	4,331,802	4,994,629	5,253,624
Health & Transportation		487,769	365,718	643,965	649,534
Plant Maintenance		777,882	780,895	801,251	828,905
Other		432,944	527,051	614,263	614,263
<b>Total Salaries:</b>		<b>20,837,395</b>	<b>21,009,586</b>	<b>22,839,751</b>	<b>23,722,196</b>
<b>Salary Offsets:</b>		<b>0</b>	<b>0</b>	<b>(1,328,863)</b>	<b>(1,586,335)</b>
<b>Net Salaries:</b>		<b>20,837,395</b>	<b>21,009,586</b>	<b>21,510,888</b>	<b>22,135,861</b>
<b>Summary - Expenses</b>					
System Administration		454,554	541,065	394,915	303,762
Elementary Instruction		322,849	350,672	323,778	333,491
Middle School Instruction		181,894	147,667	167,609	172,637
Curriculum, Library, Media		219,847	261,160	300,743	309,765
PS/Special Education Instruction		2,486,820	3,242,841	3,964,845	3,642,494
Health & Transportation		368,946	660,289	1,060,289	1,092,098
Utilities		945,413	932,320	1,191,882	1,191,882
Plant Maintenance		513,886	670,097	441,395	454,637
<b>Total Expenses:</b>		<b>5,494,209</b>	<b>6,806,111</b>	<b>7,845,456</b>	<b>7,500,767</b>
<b>Expense Offsets:</b>		<b>0</b>	<b>0</b>	<b>(1,152,000)</b>	<b>(920,000)</b>
<b>Net Expenses:</b>		<b>5,494,209</b>	<b>6,806,111</b>	<b>6,693,456</b>	<b>6,580,767</b>
<b>Total Expense &amp; Salary:</b>		<b>26,331,604</b>	<b>27,815,697</b>	<b>30,685,207</b>	<b>31,222,963</b>
<b>Less: Total Offsets</b>		<b>0</b>	<b>0</b>	<b>(2,480,863)</b>	<b>(2,506,335)</b>
<b>Total Net Operating Budget:</b>		<b>26,331,604</b>	<b>27,815,697</b>	<b>28,204,344</b>	<b>28,716,628</b>
<b>Benefits:</b>		<b>6,700,568</b>	<b>6,204,274</b>	<b>6,450,128</b>	<b>6,800,075</b>
		<b>33,032,172</b>	<b>34,019,971</b>	<b>34,654,472</b>	<b>35,516,703</b>

## BUDGET ISSUES

Level Services: *Personal Services* - The FY12 budget is increasing by \$882,445, compared to the FY11 budget. In the FY12 Level Staff Budget, total staff is reduced by 4.60 FTE due to the ending of funding by the Federal Education Jobs Grant that was received for FY11. All union employees have settled through FY12. The increase in personal services (excluding salary offsets) relates to all steps, lane and other wage components for the reduced level of staffing. For further details regarding this budget grouping, see **SPS budget information located on their website**.

*Expenses* - The FY12 budget is decreasing by \$344,689, compared to the FY11 budget. The majority of this decrease is within PS/Special Education Instruction. For further details regarding this budget grouping, see **SPS budget information located on their website**.

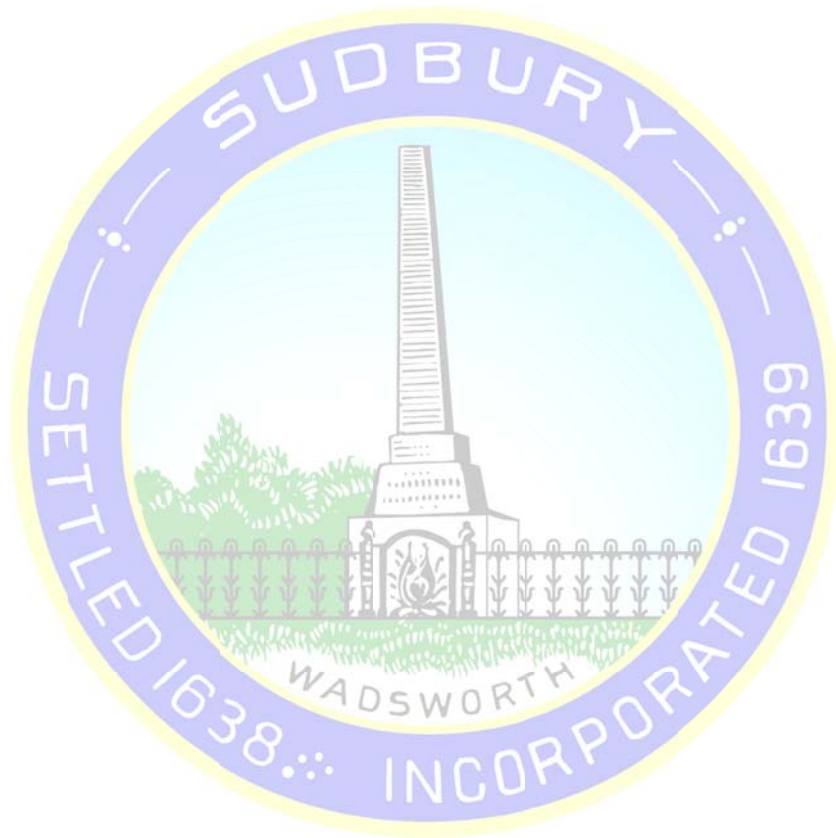
*Benefits and Insurances*-The FY12 budget is increasing by \$349,947, compared to the FY10 budget. Town and SPS share all benefits and insurance programs. For further details regarding this budget grouping, see **Shared Program Section**.

*Offsets* - The FY12 budget is increasing by \$25,472, compared to the FY11 budget. Offsets are made up of grants, fees and other special revenues that may be directly applied to expenses without appropriation. Throughout the year, these offsets will be used and consequently allocated to the various salaries and other expense line items shown above. Actual results for prior years reflect these allocations, whereas for budgetary purposes, offsets are shown separately in aggregate. For further details regarding this budget grouping, see **SPS budget information located on their website**.

For more detailed information on the SPS FY12 budget, please visit  
<http://www.sudbury.k12.ma.us>

# Section Seven

## LINCOLN-SUDBURY REGIONAL HIGH SCHOOL



## LINCOLN-SADBURY REGIONAL HIGH SCHOOL

### MISSION OF THE DISTRICT

The Lincoln-Sudbury Regional High School mission is as follows: Promotion of cooperative and caring relationships between adults and students; respect for human differences; and satisfaction with excellence only, particularly in academics.

### Core Values

In addition, the following core values are adhered to:

- Fostering of cooperative and caring relationships
- Respect for human differences
- Development and maintenance of a purposeful and rigorous academic program that constitute the foundation of the operation of Lincoln-Sudbury Regional High School.
- Provide opportunities for students to develop a strong knowledge base in the various disciplines and program areas; reflected in our graduation requirements.

### DESCRIPTION OF SERVICES

Lincoln-Sudbury Regional High School views itself as "a different kind of place" -- a place that not only tolerates but truly values diversity in style and substance. This quality manifests itself in the academic program and in the general atmosphere of the school, and may best be seen in the respectful and warm relationships between students and adults, the high degree of autonomy for and participation by the faculty in decisions, and a school culture marked by commitment to innovation and experimentation. Through a challenging academic program and a wide variety of school activities, students are expected to make choices and to have a degree of power over their own education. The ability to make good choices requires the development of a sense of responsibility and an understanding of the ethical implications of their actions. Formality and standardization are less important than creativity, originality, and critical thinking skills. The school culture also seeks to join academic skills to an active civic concern for the Lincoln-Sudbury community, American society, and the world beyond.

### **STAFFING: (FTE's 209.57)**

Staffing consists of the following:

	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Appropriated</b>	<b>Level Service</b>
Headcount (FTEs)			
Administration	24.63	24.02	24.02
Teaching Staff	123.89	123.04	123.04
SPED Teaching Staff	19.25	18.25	18.25
Educational Support Staff	14.45	14.35	14.35
SPED Support Staff	15.65	16.50	16.50
Metco program	3.00	2.60	2.60
Custodial/Grounds/Maintenance	10.80	10.80	10.80
Total FTEs	<b>211.67</b>	<b>209.57</b>	<b>209.57</b>



	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>LINCOLN-SUDBURY REGIONAL HS</b>				
Sudbury Apportionment	<b>84.81%</b>	<b>84.51%</b>	<b>84.36%</b>	<b>84.88%</b>
LSRHS Benefits Assessment	3,117,966	3,142,491	3,218,181	3,317,351
LSRHS Oper. Assessment	16,471,854	16,854,852	16,999,542	18,334,852
LSRHS Oper. Offsets	(3,255,278)	(3,192,298)	(2,640,344)	(2,642,792)
	16,334,542	16,805,045	17,577,379	19,009,411
LSRHS Debt Assessment	2,394,071	2,298,949	2,237,147	2,193,072
<b>Total LSRHS (Sudbury Portion)</b>	<b>18,728,612</b>	<b>19,103,994</b>	<b>19,814,526</b>	<b>21,202,482</b>

## BUDGET ISSUES

Level Services: *Benefits Assessment* - The FY12 budget is increasing by \$99,170, compared to the FY11 budget. This represents Sudbury's share of benefits costs for the District.

*Operating Assessment* - The FY12 budget is increasing by \$1,335,310, compared to the FY11 budget. This represents Sudbury's share of all other operating expenses for the District.

*Assessment Offsets* - The FY12 budget is increasing by \$2,448, compared to the FY11 budget. Assessment Offsets are made up of State Aid, fees and reapportionment (which is similar to Free Cash for municipalities that can be allocated back to District members). This represents Sudbury's share of all Offsets available for allocation to District members.

*Debt Assessment* - The FY12 budget is decreasing by \$44,075, compared to the FY11 budget. This represents Sudbury's share of all debt service for the District.

## TOTAL LSRHS DISTRICT BUDGET DETAIL

This detail represents all operating expenses for the District prior to assessment allocation to members (Sudbury and Lincoln).

LINCOLN-SUDBURY RHS	FY'09 ACTUAL	FY'10 ACTUAL	FY'11 APPROPRIATED	FY'12 LEVEL SERVICE BUDGET
<b>SALARIES &amp; COMPENSATION</b>				
SALARIES PROFESSIONAL	12,304,543	12,011,294	12,241,739	12,924,920
SALARIES SUPPORT	827,848	850,344	841,739	853,503
SALARIES OTHER	1,822,810	1,864,533	1,903,199	1,990,219
SALARIES OVERTIME	18,741	13,191	24,000	24,000
RETIREMENT INCENTIVE	139,471	94,523	-	-
SALARIES SUBSTITUTES	42,040	58,912	100,000	100,000
STIPENDS	108,281	201,115	221,958	222,101
SALARIES RESERVE	10,894	9,588	24,000	24,000
<b>TOTAL-SALARIES &amp; COMPENSATION</b>	<b>15,274,628</b>	<b>15,103,498</b>	<b>15,356,635</b>	<b>16,138,742</b>
SERVICES & EXPENSE	4,165,225	4,480,685	4,831,865	5,463,282
SUPPLIES & MATERIALS	549,854	533,791	482,515	496,990
EQUIPMENT	154,410	133,203	75,815	78,089
UTILITIES	784,161	822,156	779,166	778,664
CAPITAL EXPENSE	-	104,103	-	-
CONTINGENCY	-	28,334	194,414	30,000
FEES & OTHER OFFSETS	(1,476,632)	(1,129,306)	(1,379,691)	(1,412,379)
<b>OPERATING BUDGET</b>	<b>19,451,647</b>	<b>20,076,465</b>	<b>20,340,718</b>	<b>21,573,390</b>
<b>PENSIONS &amp; INSURANCE</b>	3,438,777	3,098,093	3,597,769	3,908,283
<b>SCHOOL CHOICE/CHARTER</b>	19,357	20,264	27,519	27,519
<b>TOTAL-OPERATING BUDGET</b>	<b>22,909,781</b>	<b>23,194,822</b>	<b>23,966,006</b>	<b>25,509,192</b>

## BUDGET ISSUES

Level Services: *Salaries & Compensation* - The FY12 budget is increasing by \$782,107, compared to the FY11 budget. All union employees of LSRHSD have settled for FY12. The increase in personal services relates to all steps, lane and other wage components for the proposed level of staffing. For further details regarding this budget grouping, see [LSRHSD budget information located on their website](#).

*Pensions and Insurances*-The FY12 budget is increasing by \$310,514 compared to the FY11 budget. For further details regarding this budget grouping, see [LSRHSD budget information located on their website](#).

*All Other Expenses* - The FY12 budget is increasing by \$631,417, compared to the FY11 budget. The majority of this increase is out-of-district placement. For further details regarding this budget grouping, see [LSRHSD budget information located on their website](#).

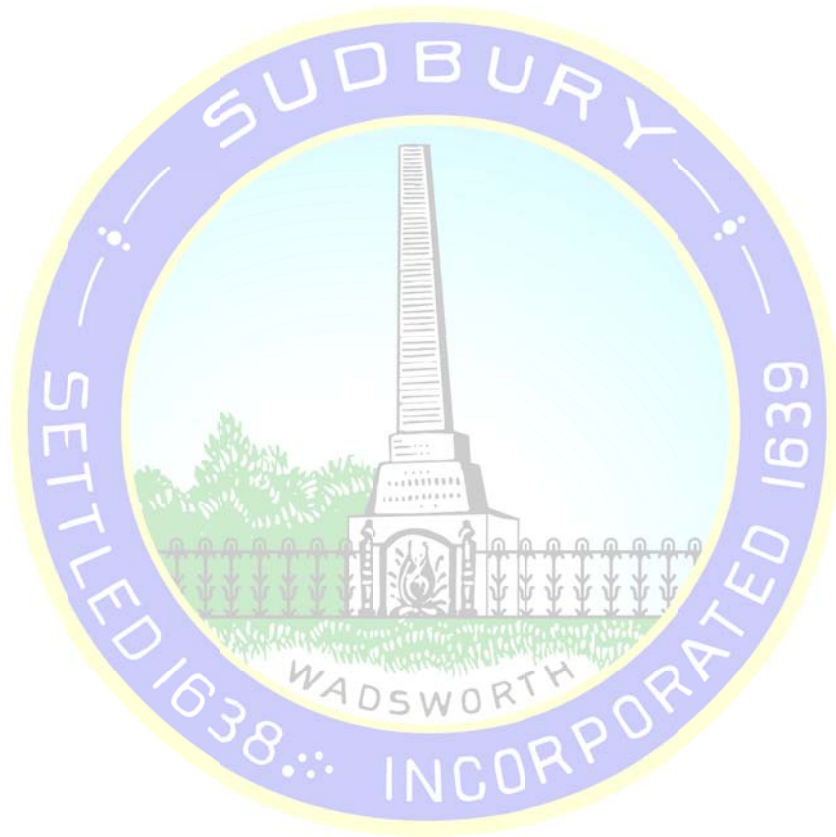
*Fees and Offsets* - The FY12 budget is increasing by \$32,688, compared to the FY11 budget. Offsets are made up of grants, fees and other special revenues that may be directly applied to expenses without appropriation. Throughout the year, these offsets will be used and consequently allocated to the various salaries and other expense line items shown above. For this document, Actual and Budget results for LSRHSD separately show offsets in aggregate. For further details regarding this budget grouping, see **LSRHSD budget information located on their website**.

For more detailed information on the LS FY11 budget, please visit  
<http://www.lsrhs.net/community/schoolcom/>



## Section Eight

# OTHER REGIONAL SCHOOLS



## MINUTEMAN REGIONAL VOCATIONAL TECHNICAL HIGH SCHOOL

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>MINUTEMAN VOCATIONAL</b>				
Operating Assessment	237,788	298,098	228,794	343,816
<b>Total: Minuteman Vocational</b>	<b>237,788</b>	<b>298,098</b>	<b>228,794</b>	<b>343,816</b>

### BUDGET ISSUES

Level Services: The actual assessment for FY12 may fluctuate from FY11 depending on Minuteman's overall operating budget strategy and State Aid expectations. Actual assessments for all member communities are not finalized until spring. Until then, Sudbury is using a preliminary assessment figure issued by Minuteman on January 27, 2011. This represents a 50% increase, compared to the FY11 budget.

## OTHER REGIONAL HIGH SCHOOL ASSESSMENT

Back in FY09, this budget was for two Sudbury students who have elected to attend a vocation high school other than Minuteman, and by state law, Chapter 74 section 7, 7c and 8a, the municipality where the student resides is required to pay the non-residential tuition and transportation costs. Since then, Sudbury has not had any high school students attending any other out-of-district locations.

	<b>FY09</b>	<b>FY10</b>	<b>FY11</b>	<b>FY12</b>
	<b>Actual</b>	<b>Actual</b>	<b>Appropriated</b>	<b>Level Services</b>
<b>OTHER EDUCATIONAL ASSESSMENTS</b>				
Operating Assessment	43,212	0	0	0
<b>Total: Other Regional</b>	<b>43,212</b>	<b>0</b>	<b>0</b>	<b>0</b>

### BUDGET ISSUES

Level Services: The Town does not have any students that will attend other regional vocational schools in FY12.