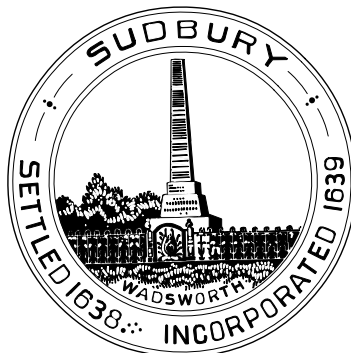


Town of Sudbury Massachusetts



2010 OFFICIAL WARRANT ANNUAL TOWN ELECTION

Including Regional District School Committee

March 29, 2010

Polls Open 7:00 A.M. to 8:00 P.M.

Precincts 1, 2 & 5 - Fairbank Community Center, Fairbank Road

Precincts 3 & 4 - Sudbury Town Hall, Concord Road

ANNUAL TOWN MEETING

April 5, 2010 7:30 P.M.

SPECIAL TOWN MEETING

April 6, 2010 7:30 P.M.

Lincoln-Sudbury Regional High School Auditorium

BRING THIS BOOK WITH YOU



TOWN OF SUDBURY
SPECIAL TOWN MEETING WARRANT
Commonwealth of Massachusetts
Middlesex, ss.

To the Constable of the Town of Sudbury:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify and warn the inhabitants of the Town of Sudbury qualified to vote in Town affairs to meet at the Lincoln-Sudbury Regional High School Auditorium in said Town on Tuesday, April 6, 2010, at 7:30 o'clock in the evening, then and there to act on the following article:

ARTICLE 1 **MINUTEMAN REGIONAL VOCATIONAL TECHNICAL SCHOOL -**
FEASIBILITY STUDY

To see if the Town will approve the sum of \$725,000, or any other sum, of borrowing authorized by the Minuteman Regional Vocational Technical School District for the purpose of paying costs of a feasibility study to consider options for making improvements to the District's high school building located at 758 Marrett Road, Lexington, Massachusetts, which options shall include, but not be limited to renovating, reconstructing, expanding, remodeling and adding to the District's high school, or any combination of the foregoing, said sum to be expended at the direction of the School Building Committee; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: If approved, Sudbury, as a member of the 16-town regional school district, will be assessed a portion of the total borrowing costs. **Sudbury's share is estimated to be a total of \$10,344**, which will be paid out over 5 years beginning FY12. Pursuant to M.G.L. c.71 §16(d), the member Minuteman Regional Vocational Technical School District towns must vote to approve the authorization of certain debt to be incurred by the District. In this case, the debt to be incurred is for the purpose of conducting a Feasibility Study relative to making improvements to the District's facility, for which application will be made for a grant from the Massachusetts School Building Authority (MSBA). Any costs of the project incurred by the District over and above any grant received will be the responsibility of the District. Likewise, the total amount of the borrowing authorized by the District will be reduced by any grant amount received from the MSBA. The Board will report further at the Special Town Meeting.

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

And you are required to serve this Warrant by posting an attested copy thereof at the Town Hall at least fourteen days before the time appointed for such meeting.

Hereof fail not and make due return by your doing thereon to the Town Clerk, at or before the time of meeting aforesaid.

Given under our hands this 10th day of March, 2010.

SELECTMEN OF SUBURY: William J. Keller, Jr.

John C. Drobinski

Lawrence W. O'Brien

**TOWN OF SUDBURY
2010 ANNUAL TOWN MEETING WARRANT**

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Part II – FINANCE COMMITTEE SECTION follows Page 38.

(note page 103 revised to read Appendix III. **FY09 Employee Compensation over \$100K**)

Volunteer Request Form

Spring Roadside Cleanup – information and sign-up form

ACCESS TO LINCOLN-SUDBURY REGIONAL HIGH SCHOOL and
PROVISIONS FOR THE DISABLED

The Board of Selectmen wishes to accommodate the attendance and participation of persons with disabilities at Town Meeting. As such, we urge those who may require particular accommodations to read the following carefully.

Parking: “HP” parking spaces are provided at two different locations: 1) the main entrance at the upper level (which will require using an elevator to the lower level to check in and to access the auditorium) and 2) the main parking lot to the right (east) of the school. From this location, you may also be dropped off at the entry walkway – a clear path to the entrance doors, leading directly to the check-in tables and the auditorium. Police on duty will provide assistance as needed, or requested.

Auditorium Balcony: The balcony can only be accessed from the Main Level. From the lower level of the building, you may use either the stairs or the elevator to gain entrance to the balcony – the upper level of the auditorium. The Moderator has ruled that if there is adequate seating on the main floor, the balcony **will not** be opened.

Persons with Ambulatory Disabilities: Spaces for persons who use wheelchairs will be available at the front and at the rear of the auditorium. For those who use assistive devices to ambulate, seating will be reserved at the rear of the hall and may be used if desired.

Persons who are Blind or have Vision Impairments: Reserved seating will be available at the front of the auditorium for persons with vision impairments who prefer to be close to the overhead projector. Large print materials will be made available where possible. We encourage those making prepared, formal presentations to have copies of viewgraphs, especially motions, available in large print.

Persons who are Deaf or have Hearing Impairments: A limited number of headphone amplifiers connected to the public address system are available for the use of persons with hearing impairments. Please ask for Mary McCormack when you enter the auditorium to obtain one of these amplifiers. For persons who are deaf and require a sign language interpreter, please contact the Selectmen’s Office no later than March 20, 2009. As there is great demand for qualified interpreters, advance notice will facilitate their availability.

Restrooms: Restrooms are located across the hall from the auditorium.

Refreshments: Coffee and other refreshments are located in the High School corridor near the main entrance on the same level as the auditorium. Refreshments may not be consumed in the auditorium.

If you have any questions regarding these, or any other matters which address accommodations, please contact Mary McCormack (978) 639-3382; or the Massachusetts Relay service of VERIZON: 1-800-439-2370 (V/TDD).

SUMMARY OF BASIC TOWN MEETING PROCEDURES

Only registered voters and Town employees may speak without leave of the Hall.

All votes are by majority unless otherwise announced. Votes will first be taken by a show of hands while sitting. If the Moderator is in doubt, then a standing vote will be taken. If the Moderator is still in doubt, then tellers will count the Hall. If a voter is in disagreement with the Moderator's call of a sitting or standing vote, the voter may challenge the call by immediately standing and saying loudly, "I challenge the vote!" If six additional voters support the challenge, the vote will be counted. If you are in attendance because of a matter of particular interest to you, it is unwise to "bolt" the Hall immediately after the vote is taken. It may be that someone will seek a count of the vote or will seek reconsideration.

The Moderator will not vote - even in the case of where the Moderator's vote would break or create a tie.

The order of speaking is controlled by tradition and Article II, §10 of the Town Bylaws. The proponents of an article make the first motion under the article. A second is then required. The proponents then make a presentation in support of the motion. The Finance Committee is next recognized, followed by the Selectmen and any other boards, which are required to report on the article. After the Town boards have spoken, Town Meeting proceeds to general debate on the matter and a vote.

Until everyone who wishes to be heard has been heard, no person may speak more than twice on a matter except to correct an error or answer a question. The initial presentation by the proponent(s) of an article may not exceed a total of ten minutes in length, and no other speech may exceed five minutes in length unless consent is given by a majority of those present and voting.

Please raise your hand when you wish to be recognized by the Moderator to speak. After being called upon by the Moderator, kindly go to a microphone to speak or wait for one to be passed to you at your seat. We expect to have microphones at each side and in front on the auditorium floor as well as runners with microphones to service voters in the middle of the aisle and, if necessary, the balcony. The basic record of Town Meeting is made on audiotape and your remarks will not be recorded if you do not speak from a microphone. Each and every time you speak, you should begin by giving your name and your address again so the record can be clear.

Budget: By tradition in Sudbury a motion is first made by the Finance Committee proposing a budget that would be limited to the amount which would be required to finance the Finance Committee's budget proposal. This limiting motion will only seek a declaration from the Hall as to the overall limit on the budget. A vote in favor of the motion will not mean that Town Meeting has voted for the particular distribution of the total amount as set forth in the Warrant.

After voting on the limiting motion, Town Meeting will address the budget in the usual way and finally vote on that budget:

1. The Moderator will read the budgets in numerical order by title. If anyone has a motion to amend or a question, just raise your hand. For example, the Moderator will say "200 Public Safety, does anyone have a motion to amend or a question involving 200 Public Safety?"
2. If someone has a motion to amend, it should be in one of two forms.
 - a. For example, "I move to increase 200 Public Safety to the sum of \$X and to reduce 600 Culture and Recreation to the sum of \$Y." The two must balance. **OR**

- b. For example, "I move to reduce 200 Public Safety to the sum of \$X."

A motion simply to increase a line item will not be accepted. This is so because consideration of the budget will have been preceded by the vote limiting the total budget amount.

3. The Hall will debate and vote on any motion to amend.
4. Town Meeting will arrive at the end of this process with a main motion on the budget as it may be amended, and then vote on it.

Motions for Reconsideration: The Town Bylaw on Motions for Reconsideration is somewhat complex. If reconsideration is sought of a matter which has been voted upon during the same night of Town Meeting, a two-thirds vote is required. If reconsideration is sought after the close of the session at which the action was taken, a unanimous vote is required unless by noon of the day after the session a written notice of intent to seek reconsideration signed by 15 voters who attended the session at which the action was taken is filed with the Town Clerk. If that occurs, the Moderator will announce it at the next session and further announce that reconsideration will be the first order of business at the next following session unless the Warrant is completed that night, in which case it will be the last order of business that night. A two-thirds procedural vote to reconsider the matter is then required before the original substantive motion can be discussed and voted. The tradition in Sudbury is not to grant reconsideration except for a misstatement of fact so great that it changed the outcome of the original vote. In the last three decades, reconsideration has been granted less than a handful of times.

All substantive motions, and that includes all main motions and motions to amend a main motion, must be provided to the Town Clerk and the Moderator in writing. Again, this is so there will be an accurate record of the meeting. Except when specifically requested by the Moderator, it is not necessary that the written motion be given to the Moderator, Town Clerk and viewgraph operator before it is actually made, but it should be furnished immediately thereafter.

Adjournment of any session will occur upon completion of the article under discussion at 10:30 P.M. unless there is a two-thirds vote to do otherwise.

CONSENT CALENDAR

To expedite Town Meeting and save valuable time for discussion of key issues, Sudbury has used the "Consent Calendar" to speed passage of articles that appear to raise no controversy. The purpose of the Consent Calendar is to allow the motions under these articles to be acted upon as one unit and to be passed by a unanimous vote without debate. **THE CONSENT CALENDAR WILL BE TAKEN UP AS THE FIRST ORDER OF BUSINESS AT THE COMMENCEMENT OF THE FIRST NIGHT OF TOWN MEETING.**

At the call of the Consent Calendar, the Moderator will call out the numbers of the articles, one by one. If any voter has doubt about passing any motion, or wishes an explanation of any subject on the Consent Calendar, the voter should stand and say the word "hold" in a loud, clear voice when the number is called. The Moderator will then inquire as to whether the request to hold is for a question or for debate. If the purpose of the request was merely to ask a question, an attempt to obtain a satisfactory answer will be made, and if that occurs, the article will remain on the Consent Calendar absent a further request to hold. If the purpose of the request was to hold the article for debate, the article will be removed from the Consent Calendar and restored to its original place in the Warrant, to be brought up, debated and voted on in the usual way. No voter should hesitate to exercise the right to remove matters from the Consent Calendar; it is the view of the voters as to the need for debate that is supreme, not that of the Town Officials who put together the Consent Calendar. However, it is hoped that voters will remove articles from the Consent Calendar only in cases of genuine concern. In past years, it has occasionally happened that articles were removed from the Consent Calendar and when reached in

the normal course, passed unanimously without debate, thus indicating that the initial removal request was, perhaps, not fully considered before being exercised. After calling out each individual article in the Consent Calendar, the Moderator will ask that all articles not removed from the Consent Calendar be passed as a unit by a unanimous vote.

Please review the list of articles and motions proposed for the Consent Calendar that follows. Complete reports are to be found under each article printed in this Warrant. If you have any questions about the articles, motions or procedure, please feel free to call the Town Manager's office at (978) 639-3381 before Town Meeting.

CONSENT CALENDAR ARTICLES AND MOTIONS

ARTICLE 11. CHAPTER 90 HIGHWAY FUNDING: Move in the words of the article.
(See article at page 7.)

ARTICLE 12. REAL ESTATE EXEMPTION: Move in the words of the article.
(See article at page 7.)

ARTICLE 13. TOWN/SCHOOL REVOLVING FUNDS: Move in the words of the article.
(See article at page 8.)

ARTICLE 16. ACCEPT M.G.L.c.71 §37M – CONSOLIDATE SCHOOL & TOWN FACILITY MAINTENANCE FUNCTIONS: Move to accept M.G.L. c.71 §37M. (See article at page 11.)

ARTICLE 17. INCREASE DEMAND CHARGE FOR DELINQUENT TAXES: Move in the words of the article. (See article at page 12.)

ARTICLE 22. LONG-TERM CELL TOWER LEASING: Move in the words of the article.
(See article at page 21.)

ARTICLE 23. SPECIAL ACT – CELL TOWER BIDDING: Move in the words of the article.
(See article at page 21.)

ARTICLE 26. ACCEPT M.G.L. c.272 §73A – REMOVAL OF GRAVESTONES FOR REPAIR:
Move in the words of the article. (See article at page 23.)

ARTICLE 28. WASTEWATER FEASIBILITY STUDY: Move in the words of the article.
(See article at page 25)

ARTICLE 29. RESCIND/AMEND BORROWINGS: Move in the words of the article.
(See article at page 26.)

ARTICLE 37. COMMUNITY PRESERVATION FUND - AMEND ART. 29 OF THE 2008 ATM, TOWN HALL WINDOW RESTORATION TIME EXTENSION: Move in the words of the article.
(See article at page 30.)

ARTICLE 38. COMMUNITY PRESERVATION FUND –REVERSION OF CPA FUNDS:
Move in the words of the article. (See article at page 31.)

A MOTION PRIMER

Contrary to popular belief, an article in the Warrant is not “self-starting.” If an article were to be called up, and nobody makes a motion under it, the article would simply be “passed over”, and whatever action had been contemplated thereby would not occur. It is a motion, which puts an article “in play,” and it is the motion, *not the article*, which is actually voted upon. Thus, while speakers may refer to passing, defeating, or otherwise dealing with “the article,” in fact and in law, what the meeting deals with, debates, and votes upon are motions, not articles. The article in the Warrant serves only the purpose of letting the voters know what may come before the meeting and the outside scope of what may be considered. It may be that a speaker will question whether a certain motion is “within the four corners of the article.” Such a challenge requires the Moderator to determine whether the motion should be allowed, as being within a reasonable reading of the article as printed in the Warrant, or be ruled out of order as being beyond the legitimate subject matter of the article.

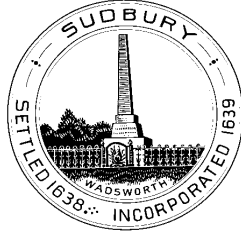
Many times the first or “main” motion under an article, will be “Move in the words of the article.” By making such a motion, the speaker is adopting the article as his or her motion thereunder. This can only be done where the language of the article is drafted in such a way that it is appropriate for simple adoption as a motion. Whenever the presenter’s motion differs from the wording in the Warrant, the presenter must point out and explain those differences to the Hall.

Frequently there will be a motion “to indefinitely postpone” an article. This motion, if adopted, kills the article for all intents and purposes for the Town Meeting. The motion is frequently used when proponents of an article have decided not to proceed with it but want an opportunity to explain to the meeting why they are, in effect, abandoning the article at this time. The motion also may be used by someone who wishes to defeat an article before it can be fully debated on the merits. In such cases it is important to understand that indefinite postponement can have the same effect as defeat which, in turn, can have significance with respect to some items, notably zoning matters, as to when the matter can again be considered by the Town.

You may hear a “Motion for the previous question,” or simply folks shouting “question.” This is a motion to terminate debate and requires a two-thirds vote to pass. The Moderator has discretion as to whether to accept a motion for the question, and it will be refused if the Moderator does not believe there has been a fair opportunity for debate as of the time it is made. However, once made and accepted by the Moderator and seconded, it is voted upon without debate. Upon passage, such a motion terminates the debate then occurring and requires an immediate vote on the substantive or procedural matter on the floor.

For those who may have participated in other parliamentary activities, the frequently heard “Motion to Lay on the Table” used in other forums is almost never used in Sudbury. The tradition here is to use the “Motion to Indefinitely Postpone” to perform the “killing” function of the motion to table, and to use a “Motion to Postpone to a Time Certain” to accomplish a “tabling” or temporary suspension of debate on a matter because of lack of information or other cause.

PART I
TOWN OF SUDBURY
ANNUAL TOWN MEETING
WARRANT



Commonwealth of Massachusetts
Middlesex, ss.

To the Constable of the Town of Sudbury:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify and warn the inhabitants of the Town of Sudbury, qualified to vote in Town Elections, that voters residing in Precincts 1, 2 and 5 should meet at the Fairbank Community Center and voters residing in Precincts 3 and 4 should meet at the Town Hall in said Town on Monday, March 29, 2010, at seven o'clock in the forenoon; then and there to choose by official ballot in accordance with law, one member of the Board of Assessors, two Goodnow Library Trustees, one member of the Board of Health, four members of the Board of Park and Recreation Commission, one member of the Board of Selectmen, one member of the Sudbury School Committee and two members of the Planning Board, all for three years. Included as part of the Annual Town Election will be an election of two members for three years each to the Lincoln-Sudbury Regional District School Committee.

Polls will open at seven o'clock in the forenoon and will be closed at eight o'clock in the evening.

And you are required to notify and warn the inhabitants of said Town qualified to vote in Town affairs to meet at the Lincoln-Sudbury Regional High School Auditorium in said Town on Monday, April 5, 2010, at 7:30 o'clock in the evening, then and there to act on the following articles:

ARTICLE 1. HEAR REPORTS

To see if the Town will vote to hear, consider and accept the reports of the Town Boards, Commissions, Officers and Committees as printed in the 2009 Town Report or as otherwise presented; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

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

ARTICLE 2. FY10 BUDGET ADJUSTMENTS

To see if the Town will vote to amend the votes taken under Article 4, FY10 Operating Budget, of the 2009 Annual Town Meeting, by adding to or deleting from line items thereunder, by transfer between or among accounts or by transfer from available funds; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article will allow flexibility to review all accounts within the FY10 Operating Budget to make adjustments at the ATM, if necessary. The Board will report at Town Meeting.

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

ARTICLE 3. STABILIZATION FUND

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the sum of \$50,000 or any other sum or sums, to be added to the Stabilization Fund established under Article 12 of the October 7, 1982 Special Town Meeting, pursuant to M.G.L. Chapter 40, Section 5B; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Two-thirds vote required)

BOARD OF SELECTMEN REPORT: Provided that the motion under this article receives a two-thirds vote of approval and the override ballot question passes at a subsequent Town Election, \$50,000 will be added to the Town's Stabilization Fund. This fund protects the Town in case of a severe emergency and is beneficial in supporting the Town's AAA bond ratings, which in turn result in lowering borrowing costs. The Board unanimously supports this article.

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

ARTICLE 4. FY11 BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, for any or all Town expenses and purposes, including debt and interest, and to provide for a Reserve Fund, all for the Fiscal Year July 1, 2010 through June 30, 2011, inclusive, in accordance with the following schedule, which is incorporated herein by reference; and to determine whether or not the appropriation for any of the items shall be raised by borrowing; or act on anything relative thereto.

EXPENDITURES	FY09 Actual	FY10 Budget	FY11 Non-Override	FY11 Override
300: Sudbury Public Schools: Net	26,338,562	27,890,503	27,964,450	28,762,956
300: SPS Employee Benefits*	6,700,568	6,380,138	6,450,128	6,450,128
300: SPS Health Insurance Reserve**	-	-	-	-
	33,039,130	34,270,641	34,414,578	35,213,084
300: LS Operating Assessment: Net	16,334,542	16,837,045	17,651,561	18,117,416
300: LS Debt Assessment	2,394,071	2,298,949	2,237,147	2,237,147
300: LS E&D	-	-	-	8,500
	18,728,612	19,135,994	19,888,708	20,363,063
300: Minuteman Regional Assessment	237,788	299,768	228,794	228,794
300: Other Regional School Assessments	43,212	20,700	-	-
Total: Schools	52,048,743	53,727,103	54,532,080	55,804,941
100: General Government	2,160,424	2,285,787	2,314,144	2,413,114
200: Public Safety***	6,330,016	6,566,348	6,730,544	6,792,317
400: Public Works	3,406,588	3,343,183	3,295,023	3,366,439
500: Human Services	515,673	533,679	538,050	569,362
600: Culture & Recreation	1,080,329	1,141,052	1,142,324	1,178,745
900: Town Employee Benefits	4,153,667	3,884,895	4,209,905	4,308,790
900: Town-wide Operating & Transfer	70,643	378,619	302,885	382,162
1000: SPS/Town Health Insurance Reserve	-	274,703	-	-
Total: Town Departments	17,717,340	18,408,266	18,532,876	19,010,929
700: Town Debt Service	4,347,060	4,261,604	4,180,354	4,180,354
TOTAL: OPERATING BUDGET (not including Capital or Enterprise Funds)	74,113,143	76,396,973	77,245,310	78,996,224

* to be transferred to 900: Town Employee Benefits

** to be transferred to 1000: SPS/Town Health Insurance Reserve

*** Ambulance reserve funds to be transferred to 200: Public Safety (direct offset)

Submitted by the Finance Committee.

(Majority vote required)

SEE DETAILED LINE ITEM BUDGET IN THE FINANCE COMMITTEE SECTION, Part II of this Warrant. Finance Committee reports on each budget section are included therein.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the Non-Override Budget and the Override Budget.

FINANCE COMMITTEE POSITION: The Finance Committee recommends approval of the Non-Override Budget and the Override Budget.

ARTICLE 5. FY11 CAPITAL BUDGET

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, for the purchase or acquisition of capital items including but not limited to, capital equipment, construction, engineering, and design, including but not limited to renovation to buildings; and to determine whether this sum shall be raised by borrowing, lease purchase, or otherwise; or act on anything relative thereto.

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
Capital & Capital Articles				
CIPC Items	513,042	523,383	527,067	529,054
Total Capital & Articles	513,042	523,383	527,067	529,054

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
Capital				
Town Buildings	109,500	70,000	114,784	116,771
General Government	12,200	22,622	11,955	11,955
Public Safety	21,400	25,000	10,000	10,000
Public Works	354,942	325,761	298,328	298,328
Culture & Recreation	15,000	80,000	42,000	42,000
Town Center	0	0	0	0
Sudbury Public Schools	0	0	50,000	50,000
Total: Operating Expenses	513,042	523,383	527,067	529,054

Submitted by the Capital Improvement Planning Committee

(Two-thirds vote required, if borrowed)

CAPITAL IMPROVEMENT PLANNING COMMITTEE (CIPC) REPORT: Details on each item are shown in the Finance Committee Section on Page FC-41 under Capital Spending. The CIPC recommends approval of this article and will report at Town Meeting.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports both the Non-Override and Override Capital Budgets.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the Non-Override Capital Budget and the Override Capital Budget.

ARTICLE 6. AMEND BY LAWS TOWN MEETING COMMENCEMENT & BUDGET SUBMISSION

To see if the Town will vote to amend ARTICLE I, SECTION 2 of the Town of Sudbury Bylaws by deleting from Section 2 the words “the first Monday in April” and substituting therefor “a date no later than the second Monday in June” and/or to establish a new date for the Town election, and/or to authorize the Selectmen to annually establish the date for the Town Meeting; and further to amend ARTICLE IV, SECTION 5 of the Town of Sudbury Bylaws to provide that each Town department shall submit its proposed budget to the Finance Committee not less than 90 days prior to the commencement of the Annual Town Meeting and the Selectmen shall report all other requests one week later; and/or to further amend paragraph 2 of Section 5 by deleting the words “not later than February 28th” and substituting therefor “six weeks prior to the commencement of the Annual Town Meeting”; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article would allow the Board of Selectmen to change the date of Annual Town Meeting. Currently the Town Bylaws specify that the Annual Business Meeting of the Town shall begin on the first Monday in April, except that the Board of Selectmen, after a public hearing, may delay

the start of the Annual Town Meeting for up to 7 days. Sudbury has one of the earliest town meetings in the State, with many towns beginning their town meetings anywhere from late April through mid-June. The primary reasons to change the Sudbury Annual Town Meeting to a date later in the spring have to do with the preparation of the annual budget. State aid amounts are often not known until mid-April. In recent years, Sudbury has begun Town Meeting only to suspend it until May or June as we await more clarity on State aid numbers. Additionally, the calendar for actions that must be taken leading up to Town Meeting require that articles, particular the budget article, must be submitted to the Selectmen by December 31 of each year. This requires the majority of work to be done over the holidays and school vacation period each year, when staff are already busy with other activities that have a year-end due date, such as issuance of calendar year permits and various reports. Changing the date of Town Meeting would allow the due date for articles and the budget to be delayed until late January, spacing out the workload for staff and committee members. The Board of Selectmen unanimously supports this article.

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

ARTICLE 7. FY11 TRANSFER STATION ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY11 budget of the Transfer Station Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
TRANSFER STATION ENTERPRISE FUND				
Direct Costs (appropriated)	263,368	302,087	271,437	271,437
Indirect Costs*	30,912	29,595	29,595	29,595
TOTAL: TRANSFER STATION ENTERPRISE	294,280	331,682	301,032	301,032
Transfer Station Receipts	290,000	286,000	250,000	250,000
Retained Earnings Used	26,432	45,683	51,032	51,032
Total Revenue	316,432	331,683	301,032	301,032

*Appropriated within Benefits Budget

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-44. The Finance Committee recommends approval of the Transfer Station Enterprise Fund budgets.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the FY11 Transfer Station Enterprise Fund budgets as presented by the Finance Committee.

ARTICLE 8. FY11 POOL ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY11 budget of the Atkinson Pool Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
POOL ENTERPRISE FUND				
Direct Costs (appropriated)	438,924	482,656	489,868	489,868
Indirect Costs*	65,530	55,841	55,841	55,841
TOTAL: POOL ENTERPRISE	504,454	538,497	545,709	545,709
<hr/>				
Pool Receipts	440,000	460,000	460,000	460,000
Retained Earnings Used	17,927	22,656	29,868	29,868
Total Revenue	457,927	482,656	489,868	489,868

*Appropriated within Benefits Budget

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-44. The Finance Committee recommends approval of the Pool Enterprise Fund budgets.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports the FY11 Pool Enterprise Fund budgets as presented by the Finance Committee.

ARTICLE 9. FY11 RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY11 budget of the Recreation Field Maintenance Enterprise, to be included in the tax levy and offset by the funds of the enterprise; or act on anything relative thereto.

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
RECREATIONAL FIELD MAINT. ENTERPRISE FUND				
Direct Costs (appropriated)	0	160,345	221,497	187,769
Indirect Costs	0	0	0	0
TOTAL: FIELD ENTERPRISE	0	160,345	221,497	187,769
<hr/>				
Field Receipts	0	160,000	221,497	221,497
Retained Earnings Used	0	299	0	0
Total Revenue	0	160,299	221,497	221,497

Submitted by the Finance Committee.

(Majority vote required)

FINANCE COMMITTEE REPORT: See report in Finance Committee Section, Page FC-44. The Finance Committee recommends approval of the Recreation Field Maintenance Enterprise Fund budgets.

BOARD OF SELECTMENT POSITION: The Board of Selectmen unanimously supports the FY11 Recreation Field Maintenance Enterprise Fund budgets as presented by the Finance Committee.

ARTICLE 10. UNPAID BILLS

To see if the Town will vote to raise and appropriate, or appropriate from available funds, a sum of money for the payment of certain unpaid bills incurred in previous fiscal years or which may be legally unenforceable due to the insufficiency of the appropriation in the years in which such bills were incurred; or act on anything relative thereto.

Submitted by the Town Accountant.

(Four-fifths vote required)

TOWN ACCOUNTANT REPORT: Invoices that are submitted for payment after the accounts are closed at the end of a fiscal year or payables for which there are insufficient funds (and were not submitted for a Reserve Fund Transfer) can only be paid by a vote of the Town Meeting, a Special Act of the Legislature, or a court judgment.

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

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

ARTICLE 11. CHAPTER 90 HIGHWAY FUNDING

(Consent Calendar)

To see if the Town will vote to authorize the Town Manager to accept and to enter into a contract for the expenditure of any funds allotted or to be allotted by the Commonwealth for the construction, reconstruction and maintenance projects of Town ways pursuant to Chapter 90 funding; and to authorize the Treasurer to borrow such amounts in anticipation of reimbursement by the Commonwealth; or act on anything relative thereto.

Submitted by the Director of Public Works.

(Majority vote required)

DIRECTOR OF PUBLIC WORKS REPORT: Each year the Legislature allocates funds to cities and towns for the improvement of their infrastructure, to be expended under the Chapter 90 guidelines. The current plans are to continue the implementation of our pavement management program.

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

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

ARTICLE 12. REAL ESTATE EXEMPTION

(Consent Calendar)

To see if the Town will vote pursuant to Chapter 73, Section 4, of the Acts of 1986, as amended by Chapter 126 of the Acts of 1988, to allow for an increase of up to 100% of the current exemption amounts under Clauses 17D, 17E, 22, 37A, 41C and 41D, of Chapter 59, Section 5, for fiscal year 2011; or act on anything relative thereto.

Submitted by the Board of Assessors.

(Majority vote required)

BOARD OF ASSESSORS REPORT: At a Special Town Meeting held in November of 1997, voters unanimously approved a local option which provides for an increase in exemptions for the elderly, blind, veterans and others up to 100% of the statutory amounts allowable under Chapter 59, Section 5, Clauses 17D, 17E, 22, 37A, 41C, and 41D of the General Laws. The Town of Sudbury has voted each year to adopt the local option since November 1997. Chapter 73, Section 4, of the Acts of 1986, requires annual acceptance by Town Meeting vote, and is not cumulative. A brief description of each of the affected exemptions is listed below:

CLAUSE 17D(E) - Applicant must be over the age of 70, or a surviving spouse (of any age) with limited personal assets. The personal asset figure varies annually according to the C.O.L.A. index. The personal asset maximum for Fiscal Year 2010 was \$52,706. The FY10 benefit was \$273.56 (subject to annual C.O.L.A. index). Acceptance may result in a potential impact of up to \$547.12 (or twice the current value of the exemption based upon the C.O.L.A.).

CLAUSE 22 - Applicant must be a veteran, (or a qualifying veteran's spouse, or surviving spouse), with a qualifying service-related disability of not less than 10%. The current benefit is a minimum of \$400. Acceptance may result in a possible maximum impact ranging from \$800 to \$2,000 (dependent on disability rating).

CLAUSE 37A - Applicant must be legally blind, as certified by the Massachusetts Commission for the Blind. Current benefit is \$500. Acceptance may result in a potential impact of up to \$1,000.

CLAUSE 41C(D) - Applicant must be over the age of 65 and must have very low income and minimal personal assets in order to qualify. Income and asset amounts vary and are dependent on annual C.O.L.A. index. The current benefit is \$1,000. Acceptance may result in a potential impact of up to \$2,000.

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

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

ARTICLE 13. TOWN/SCHOOL REVOLVING FUNDS

(Consent Calendar)

To see if the Town will vote to authorize for FY11 the use of revolving funds under M.G.L. c.44, s.53E 1/2, by the following Departments of the Town in accordance with the description for each fund placed on file with the Town Clerk, said funds to be maintained as separate accounts set forth as follows:

<u>Fund</u>	<u>Department</u>	<u>Maximum Amount</u>
Plumbing & Gas Inspectional Services	Building Inspector	\$ 45,000
Portable Sign Administration & Inspectional Services	Building Inspector	\$ 10,000
Conservation	Conservation Commission	\$ 35,000
Council on Aging Activities	Council on Aging	\$ 20,000
Council on Aging Van Transportation (MWRTA)	Council on Aging	\$ 70,000
Fire Department Permits	Fire Department	\$ 45,000
Goodnow Library	Goodnow Library	\$ 10,500
Recreation Programs	Park and Recreation Commission	\$ 572,000
Teen Center	Park and Recreation Commission	\$ 15,000
Bus	Sudbury Public Schools	\$ 400,000
Instrumental Music	Sudbury Public Schools	\$ 75,000
Cable Television	Town Manager	\$ 30,000

Rental Property	Town Manager	\$ 40,000
Dog	Treasurer/Collector	\$ 40,000
Treasurer/Collector Passport Fees	Treasurer/Collector	\$ 10,000
Youth Commission	Youth Commission (Park and Recreation)	\$ 45,000
Zoning Board of Appeals	Zoning Board of Appeals	\$ 10,000;

and to confirm that said funds have been established in accordance with M.G.L. c.44 §1/2.

Submitted by the Town Finance Director.

(Majority vote required)

FINANCE DIRECTOR REPORT: This article seeks authorization for Fiscal Year 2011 for certain previously established revolving funds pursuant to M.G.L. c.44, s.53E 1/2. A descriptive summary of the funds follows:

- Plumbing and Gas Inspectional Services – permit fees collected are used to fund services for plumbing and gas inspections;
- Portable Sign Administration and Inspectional Services – annual registration fees collected pursuant to Section 3259A, Portable Signs, of the Zoning Bylaw are used to fund administration and inspectional services;
- Conservation – application fees collected are used to fund administration of the Sudbury Wetlands Bylaw;
- Council on Aging Activities – fees collected are used to fund Senior Center classes and programs;
- Council on Aging Van Transportation (MWRTA) – payments from the MetroWest Regional Transit Authority (MWRTA) and fare are used to pay salary and benefits of van driver and van operating expenses;
- Fire Department – permit fees collected are used to fund expenses related to the issuance of permits, including salaries and benefits, purchase and maintenance of equipment required;
- Goodnow Library – fees from non-Town agency use of Library meeting rooms are used for maintenance and utility charges for those rooms;
- Recreation Programs – fees collected are used to fund recreation programs and activities;
- Teen Center – fees collected are used for Teen Center programs and activities;
- Bus – user fee collections are used to fund additional or supplemental school transportation;
- Instrumental Music – user fees are used to fund additional or supplemental instrument music lessons after school hours;
- Cable Television – fees and other income collected in connection with cable television are used to fund local access services and the Town institutional network (I-Net);
- Rental Property – receipts received from the rental of Town-owned houses are used to fund expenditures related to the upkeep of these houses;
- Dog – fees, fines, charges, and penalties imposed under the Town Bylaw, Art. V.3, Regulation of Dogs, and those costs required by the Massachusetts General Laws are used for making purchases or paying any expenses related to the regulation of dogs;
- Treasurer/Collector – processing fees for passport applications are used to fund salaries, benefits and expenses therefor;
- Youth Commission – fees collected are used to fund youth programs and activities;
- Zoning Board of Appeals – application fees collected are used to fund part-time employee salaries.

The maximum amount stated is the same as the FY10 maximum voted for each fund except for the Fire Department Permits which increased from \$30,000 to \$45,000.

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

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

ARTICLE 14. ACCEPT M.G.L. c.64L, §2(a), LOCAL MEALS EXCISE

To see if the Town will vote to accept M.G.L. c.64L, §2(a) to impose a local meals excise; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article proposes the acceptance of a State statute allowing the adoption of a local option meals excise tax of 0.75% on sales of meals served by restaurants located in Sudbury. Currently, the State levies a 6.25% tax on meals, which all goes to the State treasury. If Sudbury approves this local option of .75%, the total meals excise will be 7.0%, but the .75% portion will be returned to Sudbury's general fund. For a \$25 restaurant bill, this would generate 19 cents; for a \$100 bill, the .75% excise would generate 75 cents. The Department of Revenue (DOR) estimates that 12 months of collections of this tax could generate \$88,000 for Sudbury for FY2011.

If Town Meeting votes approval of this article, the local option tax would begin July 1. The DOR would distribute the revenue to the Town quarterly, on September 30, December 31, March 30 and June 30.

One argument for adoption of this excise is that it helps diversify the Town's tax base. Aside from the property tax and motor vehicle excise tax, Massachusetts municipalities have very limited ability to adopt local taxes. This leaves cities and towns in a difficult position because of their dependence on local aid, which has been reduced in recent years, and because of limitations placed on the property tax by Proposition 2 ½. Around the country, most local communities have the option of levying additional taxes on items including gas, income, and the environmental impact of road and construction projects.

This local option tax has been accepted by most of the towns that directly abut Sudbury, including Framingham, Wayland, Natick, Hudson and Maynard. In addition to Boston, the following communities have voted to adopt the local option meals tax: Cambridge, Brookline, Chelmsford, Newton, Bedford, Lexington, Wellesley and Needham, among others.

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

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

ARTICLE 15. ACCEPT M.G.L. c.64G, §3A, LOCAL ROOM OCCUPANCY EXCISE

To see if the Town will vote to accept M.G.L. c.64G, §3A to impose a local room occupancy excise and to determine the rate therefor; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article proposes the acceptance of a State statute allowing the adoption of an increased local option room occupancy excise, increasing the overall excise from the current four percent to a maximum of six percent. The local excise would apply to all room occupancies subject to the State room occupancy excise. Sudbury first adopted the 4% room occupancy tax in 1997 and collected about \$58,000 in FY09.

If Sudbury approves this local option, Town Meeting would have to establish the rate, up to the maximum amount. If adopted, the local option portion of this excise will be returned to Sudbury's general fund. A \$100 hotel bill would generate an additional \$2 in revenue for Sudbury. The Department of Revenue (DOR) has not

provided an estimate of the amount of revenue that could be generated for Sudbury because we have so few hotels and lodging houses.

If Town Meeting votes approval of this article, the local option tax would begin July 1. The DOR would distribute the revenue to the Town quarterly, on September 30, December 31, March 30 and June 30.

One argument for adoption of this excise is that it helps diversify the Town's tax base. Aside from the property tax and motor vehicle excise tax, Massachusetts municipalities have very limited ability to adopt local taxes. This leaves cities and towns in a difficult position because of their dependence on local aid, which has been reduced in recent years, and because of limitations placed on the property tax by Proposition 2 ½. Around the country, most local communities have the option of levying additional taxes on items including gas, income, and the environmental impact of road and construction projects.

This local option tax has been accepted by some of the towns in the Metro West area including Framingham, Natick, Westborough, Waltham, Lexington, Wellesley and Needham, among others. Other towns, such as Wayland and Weston, do not have any hotels.

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

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

ARTICLE 16 ACCEPT M.G.L. c.71 §37M – CONSOLIDATE SCHOOL & TOWN FACILITY MAINTENANCE FUNCTIONS

To see if the Town will vote to accept M.G.L. c.71 §37M relative to the consolidation of the facility maintenance functions of the School Committee with those of the Town; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article authorizes (but does not require or implement) the creation of a consolidated public facilities maintenance function between the Town and the Sudbury Public Schools (SPS) Committee, although it could also include the Lincoln-Sudbury Regional High School (LSRHS) Committee. This State statute permits such consolidation if it is accepted by a vote of the Town Meeting and a vote of the School Committee. At this time, no funding is being requested to create this new department or to hire a professional facilities manager, but acceptance of this statute allows the planning for such a future department to continue.

Over the course of the past 20 years, the citizens of Sudbury have supported over 50 million dollars (over 120 million if LSRHS is included) worth of renovation, expansion and new construction in the form of schools, office space, DPW garage and the Goodnow Library. Altogether, the Town and Sudbury Public Schools (SPS) manage 25 buildings, with 597,106 sq. ft., with an insured value of \$60,427,746. Current staffing for the Town is provided by approximately 20% of the Town's Building Inspector's time and 70% of the Building Supervisor/Electrical Inspector's time being devoted to managing the Town's buildings except for the Goodnow Library, managed by the Library Director, and the three fire stations which the Fire Chief oversees. SPS has one maintenance director for five schools. Particularly on the Town side, this arrangement is too decentralized, and relies on staff for who building maintenance is but one of many responsibilities they are juggling and not specifically their area of expertise.

Many other towns have already created consolidated public facilities departments, and are particularly pleased with the better decision making that occurs with a more centralized and dedicated approach to protecting the

multi-million dollar investments that their taxpayers have made in their facilities. In particular, it is anticipated that savings in energy costs and in coordination of various contracts and purchases will likely offset the initial cost of setting up this new department.

As envisioned, when created, this new department will care for all Town and School-owned buildings under the control of the Town Manager and the Sudbury Public School Committee. This new department will establish appropriate services in support of the building users, foster continuous improvement in delivery of services, and establish and update a five-year facilities capital improvement plan in collaboration with the Permanent Building Committee, Town Manager, SPS School Superintendent and appropriate committees. This department will oversee all utilities of the Town and School buildings, including bidding for oil, natural gas and electrical utilities. The facilities director will work with the Town's Energy and Sustainability Green Ribbon Committee to develop and implement energy savings strategies for public buildings. The director will be responsible for developing and implementing a preventive maintenance program for all municipal and school buildings as well as manage all Town- owned rental buildings and houses. And, as noted before, this new department could be expanded to cover the Lincoln-Sudbury Regional High School District as well.

While discussion of consolidating facility management and maintenance has been going on for some time, this proposal emerged as the preferred model after the Town Manager and the Sudbury Public School Superintendent began work on a process project known as C.O.R.E. (consolidation/cooperation, outsourcing, regionalization and evaluation). Facilities management, maintenance and long-term planning was an area where both the Town and the School administration were convinced that improvements were needed; the current staffing model lacked the capacity to be strategic in thinking about how to manage the significant projects that would be needed in the future for the buildings and that working together would likely generate the most efficient and effective solution. A task force of representatives from both the Town departments and the schools met, examined the current organization structure, operations, staff and expenditures for facility management, and focused particularly on energy costs and opportunities. Among their conclusions: facilities planning, operation and maintenance is now fragmented and decentralized and in need of a new focused priority from a trained, professional facilities manager; we need a comprehensive Preventive Maintenance Program in all buildings to extend the life of critical equipment and avoid costly repairs; we could likely achieve savings by centralizing actions such as purchase of supplies and materials, development of centralized service contracts for HVAC, alarm, and other equipment; centralized attention to energy-related projects is important to finding ways to reduce our utility costs and make our energy purchases as cost efficient as possible; and finally, the Town and Schools need to develop a strategic master planning process for the capital improvements the Town and school buildings would need in the future.

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

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

ARTICLE 17. INCREASE DEMAND CHARGE FOR DELINQUENT TAXES (Consent Calendar)

To see whether the Town will vote to charge for each written demand issued by the Town Treasurer-Collector a fee of \$10 to be added to and collected as part of the tax, as authorized by Massachusetts General Laws Chapter 60, Section 15, to go into effect as of July 1, 2010; or act on anything relative thereto.

Submitted by the Town Treasurer.

(Majority vote required)

TOWN TREASURER REPORT: Passage of this article allows the Town Treasurer-Collector to raise the fee for each written demand of delinquent taxes from \$5 to \$10. MGL Chapter 60, section 15 currently authorizes demand fees up to \$30. The Massachusetts Department of Revenue has determined that Town Meeting approval is needed because it is not a license fee or charge for services; it is a statutory penalty. Also, the Massachusetts Department of Revenue requires that the demand fee be the same for all types of taxes (meaning

that the Town may not differentiate on excise vs. real estate tax demand charges). Prior to issuing a demand charge, the Treasurer-Collector issues a bill for taxes due. A demand notice is sent after 30 days of non-payment on motor vehicle excise and after May 1st for non-payment of all real estate tax billings. Only one demand notice is sent and only one demand charge is incurred. Many surrounding towns have already increased or have also suggested demand charges increases for town meetings this spring to between \$10 and \$30.

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

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

ARTICLE 18. WAYLAND/SUDBURY SEPTAGE FACILITY

To see if the Town will vote to authorize the Town Manager, with the approval of the Selectmen, to negotiate the termination, amendment or continuation of the existing Septage Agreement between the Towns of Sudbury and Wayland and/or establishment of a new Septage Agreement; and/or authorize the Town Manager with the approval of the Board of Selectmen to negotiate and contract for the sale, transfer or use of the care, custody, management, and/or control of the Town of Sudbury's right, title and interest in and to the Septage Treatment Facility and the parcel of land upon which it is situated known and numbered 490 Boston Post Road, Wayland, Massachusetts, containing 7.63 acres, more or less, and/or the leaching field adjacent thereto; and/or authorize the Town Manager, with the approval of the Selectmen, to enter into and execute all necessary and appropriate instruments and agreements, including without limitation, inter-municipal agreements, in connection with the disposition or use of said land or facility; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required; two-thirds vote required if transfer of interest in land)

BOARD OF SELECTMEN REPORT: The Wayland/Sudbury Septage Facility ended operations on December 1, 2009, following a lengthy process whereby the Boards of Selectmen of Sudbury and Wayland determined that even with significant expenditures for capital improvements to meet the permitting requirements of the Department of Environmental Protection (DEP), the aging facility had little chance of being able to be economically viable over the long term. As part of the shut down process, the two towns need to decide how to conclude the existing inter-municipal agreement between them for operating this facility, including disposition of the plant itself, which sits on a 7.63 acres parcel of land owned by the Town of Wayland and located at 490 Boston Post Road in Wayland.

This article would authorize the Board of Selectmen to sell all of the Town of Sudbury's right, title and interest in and to the Septage Treatment Facility to the Town of Wayland. At the current time, the two towns are working to determine the fair market price of the treatment plant's depreciated value.

The parcel of land upon which the treatment plant is located has remained in the ownership of the Town of Wayland so that any future use of the land shall be determined by the Town of Wayland, but the Town of Sudbury, through the inter-municipal agreement with Wayland which extends until 2017, has an interest in the facility and parcel of land, which can either remain through the life of the agreement, or be extinguished through the sale of Sudbury's interest to Wayland.

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

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

ARTICLE 19. AMEND BYLAWS – ILLICIT DISCHARGE AND CONNECTION

To see if the Town will vote to amend the Town of Sudbury Bylaws by adding thereto a new article entitled “Illicit Discharge and Connection”, said article to be numbered by the Town Clerk, as set forth below:

Section 1. Purpose

- a) Increased and contaminated stormwater runoff is a major cause of impairment of water quality and flow in lakes, ponds, streams, rivers, wetlands and groundwater; contamination of drinking water supplies; alteration or destruction of aquatic and wildlife habitat; and flooding.
- b) Regulation of illicit connections and discharges to the municipal storm drain system is necessary for the protection of Sudbury’s water bodies and groundwater, and to safeguard the public health, safety, welfare and the environment.
- c) The objectives of this Bylaw are:
 1. to prevent pollutants from entering Sudbury’s municipal separate storm sewer system (MS4);
 2. to prohibit illicit connections and unauthorized discharges to the MS4;
 3. to require the removal of all such illicit connections;
 4. to comply with State and Federal statutes and regulations relating to stormwater discharges; and
 5. to establish the legal authority to ensure compliance with the provisions of this Bylaw through inspection, monitoring, and enforcement.

Section 2. Definitions: For the purposes of this Bylaw, the following shall mean:

- a) **AUTHORIZED ENFORCEMENT AGENCY:** The Department of Public Works, (hereafter “the DPW Director”), its employees or agents designated to enforce this Bylaw.
- b) **CLEAN WATER ACT:** The Federal Water Pollution Control Act (33 U.S.C. § 1251 et seq.) as hereafter amended.
- c) **DISCHARGE OF POLLUTANTS:** The addition from any source of any pollutant or combination of pollutants into the municipal storm drain system or into the waters of the United States or Commonwealth from any source.
- d) **GROUNDWATER:** Water beneath the surface of the ground.
- e) **ILLICIT CONNECTION:** A surface or subsurface drain or conveyance, which allows an illicit discharge into the municipal storm drain system, including without limitation sewage, process wastewater, or wash water and any connections from indoor drains, sinks, or toilets, regardless of whether said connection was previously allowed, permitted, or approved before the effective date of this Bylaw.
- f) **ILLICIT DISCHARGE:** Direct or indirect discharge to the municipal storm drain system that is not composed entirely of stormwater, except as exempted in Section 8. The term does not include a discharge in compliance with an NPDES Storm Water Discharge Permit or a Surface Water Discharge Permit, or resulting from fire fighting activities and other exempt activities pursuant to Section 8 of this Bylaw.
- g) **MUNICIPAL SEPARATE STORM SEWER SYSTEM (MS4) or MUNICIPAL STORM DRAIN SYSTEM:** The system of conveyances designed or used for collecting or conveying stormwater, including any road with a drainage system, street, gutter, curb, inlet, piped storm drain, pumping facility, retention or detention basin, natural or man-made or altered drainage channel, reservoir, and other drainage structure that together comprise the storm drainage system owned or operated by the Town of Sudbury.
- h) **NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) STORM WATER DISCHARGE PERMIT:** A permit issued by United States Environmental Protection Agency or jointly with the State that authorizes the discharge of pollutants to waters of the United States.

- i) **NON-STORMWATER DISCHARGE:** Discharge to the municipal storm drain system not composed entirely of stormwater.
- j) **PERSON:** An individual, partnership, association, firm, company, trust, corporation, agency, authority, department or political subdivision of the Commonwealth or the federal government, to the extent permitted by law, and any officer, employee, or agent of such person.
- k) **POLLUTANT:** Any element or property of sewage, agricultural, industrial or commercial waste, runoff, leachate, heated effluent, or other matter whether originating at a point or nonpoint source, that is or may be introduced into any sewage treatment works or waters of the Commonwealth. Pollutants shall include without limitation:
 - 1. paints, varnishes, and solvents;
 - 2. oil and other automotive fluids;
 - 3. non-hazardous liquid and solid wastes and yard wastes;
 - 4. refuse, rubbish, garbage, litter, or other discarded or abandoned objects, ordinances, accumulations and floatables;
 - 5. pesticides, herbicides, and fertilizers;
 - 6. hazardous materials and wastes; sewage, fecal coliform and pathogens;
 - 7. dissolved and particulate metals;
 - 8. animal wastes;
 - 9. rock, sand, salt, soils;
 - 10. construction wastes and residues; and
 - 11. noxious or offensive matter of any kind.
- l) **STORMWATER:** Storm water runoff, snow melt runoff, and surface water runoff and drainage.
- m) **SURFACE WATER DISCHARGE PERMIT.** A permit issued by the Department of Environmental Protection (DEP) pursuant to 314 CMR 3.00 that authorizes the discharge of pollutants to waters of the Commonwealth of Massachusetts.
- n) **TOXIC OR HAZARDOUS MATERIAL or WASTE:** Any material, which because of its quantity, concentration, chemical, corrosive, flammable, reactive, toxic, infectious or radioactive characteristics, either separately or in combination with any substance or substances, constitutes a present or potential threat to human health, safety, welfare, or to the environment. Toxic or hazardous materials include any synthetic organic chemical, petroleum product, heavy metal, radioactive or infectious waste, acid and alkali, and any substance defined as Toxic or Hazardous under G.L. Ch.21C and Ch.21E, and the regulations at 310 CMR 30.000 and 310 CMR 40.0000.
- o) **WATERCOURSE:** A natural or man-made channel through which water flows or a stream of water, including a river, brook or underground stream.
- p) **WATERS OF THE COMMONWEALTH:** All waters within the jurisdiction of the Commonwealth, including, without limitation, rivers, streams, lakes, ponds, springs, impoundments, estuaries, wetlands, coastal waters, and groundwater.
- q) **WASTEWATER:** Any sanitary waste, sludge, or septic tank or cesspool overflow, and water that during manufacturing, cleaning or processing, comes into direct contact with or results from the production or use of any raw material, intermediate product, finished product, byproduct or waste product.

Section 3. Applicability: This Bylaw shall apply to flows entering the municipally owned storm drainage system.

Section 4. Authority: This Bylaw is adopted under the authority granted by the Home Rule Amendment of the Massachusetts Constitution and the Home Rule Procedures Act, and pursuant to the regulations of the Federal Clean Water Act found at 40 CFR 122.34.

Section 5. Responsibility for Administration: The DPW Director shall administer, implement and enforce this Bylaw. Any powers granted to or duties imposed upon the DPW Director may be delegated in writing by the DPW Director to its employees or agents.

Section 6. Regulations: The DPW Director may promulgate rules and regulations to effectuate the purposes of this Bylaw. Failure by the DPW Director to promulgate such rules and regulations shall not have the effect of suspending or invalidating this bylaw.

Section 7. Prohibited Activities

- a) **Illicit Discharges.** No person shall dump, discharge, cause or allow to be discharged any pollutant or non-stormwater discharge into the municipal separate storm sewer system (MS4), into a watercourse, or into the waters of the Commonwealth.
- b) **Illicit Connections.** No person shall construct, use, allow, maintain or continue any illicit connection to the municipal storm drain system, regardless of whether the connection was permissible under applicable law, regulation or custom at the time of connection.
- c) **Obstruction of Municipal Storm Drain System.** No person shall obstruct or interfere with the normal flow of stormwater into or out of the municipal storm drain system without prior written approval from the DPW Director.

Section 8. Exemptions: The following non-stormwater discharges or flows are exempt from the prohibition of non-stormwater discharges provided that the source is not a significant contributor of a pollutant to the municipal storm drain system:

- a) Waterline flushing;
- b) Discharge or flow resulting from fire fighting activities;
- c) Flow from potable water sources;
- d) Springs;
- e) Natural flow from riparian habitats and wetlands;
- f) Diverted stream flow;
- g) Rising groundwater;
- h) Uncontaminated groundwater infiltration as defined in 40 CFR 35.2005(20), or uncontaminated pumped groundwater;
- i) Water from exterior foundation drains, footing drains (not including active groundwater dewatering systems), crawl space pumps, or air conditioning condensation;
- j) Discharge from landscape irrigation or lawn watering;
- k) Water from individual residential car washing;
- l) Discharge from dechlorinated swimming pool water (less than one ppm chlorine) provided the water is allowed to stand for one week prior to draining and the pool is drained in such a way as not to cause a nuisance;
- m) Discharge from street sweeping;
- n) Dye testing, provided written notification is given to the DPW Director prior to the time of the test;
- o) Non-stormwater discharge permitted under an NPDES permit or a Surface Water Discharge Permit, waiver, or waste discharge order administered under the authority of the United States Environmental Protection Agency or the Department of Environmental Protection, provided that the discharge is in full compliance with the requirements of the permit, waiver, or order and applicable laws and regulations; and
- p) Discharge for which advanced written approval is received from the DPW Director as necessary to protect public health, safety, welfare or the environment.

Section 9. Emergency Suspension of Storm Drainage System Access: The DPW Director may suspend municipal storm drain system access to any person or property without prior written notice when such suspension is necessary to stop an actual or threatened discharge of pollutants that presents imminent risk of harm to the public health, safety, welfare or the environment. In the event any person fails to comply with an emergency suspension order, the DPW Director may take all reasonable steps to prevent or minimize harm to the public health, safety, welfare or the environment.

Section 10. Notification of Spills: Notwithstanding other requirements of local, State or Federal law, as soon as a person responsible for a facility or operation, or responsible for emergency response for a facility or operation has information of or suspects a release of materials at that facility or operation resulting in or which may result in discharge of pollutants to the municipal drainage system or waters of the Commonwealth, the person shall take all necessary steps to ensure containment, and cleanup of the release. In the event of a release of oil or hazardous materials, the person shall immediately notify the municipal fire and police departments, and the DPW Director, Board of Health and Conservation Commission. In the event of a release of non-hazardous material, the reporting person shall notify the DPW Director no later than the next business day. The reporting person shall provide to the DPW Director written confirmation of all telephone, facsimile or in-person notifications within three business days thereafter. If the discharge of prohibited materials is from a commercial or industrial facility, the facility owner or operator of the facility shall retain on-site a written record of the discharge and the actions taken to prevent its recurrence. Such records shall be retained for at least three years.

Section 11. Enforcement

- a) The DPW Director or an authorized agent of the DPW Director shall enforce this Bylaw, regulations, orders, violation notices, and enforcement orders, and may pursue all civil and criminal remedies for such violations.
- b) Civil Relief. If a person violates the provisions of this bylaw, regulations, permit, notice, or order issued thereunder, the DPW Director may seek injunctive relief in a court of competent jurisdiction restraining the person from activities which would create further violations or compelling the person to perform abatement or remediation of the violation.
- c) Orders. The DPW Director or an authorized agent of the DPW Director may issue a written order to enforce the provisions of this Bylaw or the regulations thereunder, which may include:
 1. elimination of illicit connections or discharges to the MS4;
 2. performance of monitoring, analyses, and reporting;
 3. that unlawful discharges, practices, or operations shall cease and desist; and
 4. remediation of contamination in connection therewith.
- d) If the enforcing person determines that abatement or remediation of contamination is required, the order shall set forth a deadline by which such abatement or remediation must be completed. Said order shall further advise that, should the violator or property owner fail to abate or perform remediation within the specified deadline, the Town of Sudbury may, at its option, undertake such work, and expenses thereof shall be charged to the violator.
- e) Within thirty (30) days after completing all measures necessary to abate the violation or to perform remediation, the violator and the property owner will be notified of the costs incurred by the Town of Sudbury, including administrative costs. The violator or property owner may file a written protest objecting to the amount or basis of costs with the DPW Director within thirty (30) days of receipt of the notification of the costs incurred. If the amount due is not received by the expiration of the time in which to file a protest or within thirty (30) days following a decision of the DPW Director affirming or reducing the costs, or from a final decision of a court of competent jurisdiction, the costs shall become a

special assessment against the property owner and shall constitute a lien on the owner's property for the amount of said costs. Interest shall begin to accrue on any unpaid costs at the statutory rate provided in G.L. Ch. 59, 57 after the thirty-first day at which the costs first become due.

- f) **Criminal Penalty.** Any person who violates any provision of this Bylaw, regulation, order or permit issued thereunder, shall be punished by a fine of not more than \$200.00. Each day or part thereof that such violation occurs or continues shall constitute a separate offense.
- g) **Non-Criminal Disposition.** As an alternative to criminal prosecution or civil action, the Town of Sudbury may elect to utilize the non-criminal disposition procedure set forth in G.L. Ch. 40, s.21D. The penalty for the 1st violation shall be \$200.00. The penalty for the 2nd violation shall be \$500.00. The penalty for the 3rd and subsequent violations shall be \$1,000.00. Each day or part thereof that such violation occurs or continues shall constitute a separate offense.
- h) **Entry to Perform Duties under this Bylaw.** To the extent permitted by State law, or if authorized by the owner or other party in control of the property, the DPW Director, its agents, officers, and employees may enter upon privately owned property for the purpose of performing their duties under this Bylaw and regulations and may make or cause to be made such examinations, surveys or sampling as the DPW Director deems reasonably necessary.
- i) **Appeals.** The decisions or orders of the DPW Director shall be final. Further relief shall be to a court of competent jurisdiction.
- j) **Remedies Not Exclusive.** The remedies listed in this Bylaw are not exclusive of any other remedies available under any applicable Federal, State or local law.

Section 12. Severability: The provisions of this bylaw are hereby declared to be severable. If any provision, paragraph, sentence, or clause, of this bylaw or the application thereof to any person, establishment, or circumstances shall be held invalid, such invalidity shall not affect the other provisions or application of this Bylaw.

Section 13. Transitional Provisions: Residential property owners shall have 180 days from the effective date of the Bylaw to comply with its provisions provided good cause is shown for the failure to comply with the bylaw during that period.;

or act on anything relative thereto.

Submitted by the Planning Board.

(Majority vote required)

PLANNING BOARD REPORT: This Bylaw continues the Town's efforts to comply with the National Pollutant Discharge Elimination System (NPDES) Phase II stormwater permit. In 2009, Sudbury adopted a local Stormwater Management Bylaw which addressed construction activities and development, and promulgated a permit review procedure for such most development. This Bylaw increases Sudbury's protections by prohibiting illegal discharge of unclean water into the Town's municipal storm drain system, and establishes fines and enforcement mechanisms for violations. While illicit discharge is not a large threat in our community, recently other nearby Massachusetts communities were fined by the Environmental Protection Agency for not adequately prohibiting illicit discharges. Sudbury seeks to avoid such fines, and continues to proactively seek ways to protect our surface and groundwater resources. We urge your support.

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 20. MINOR AMENDMENTS TO ZONING BYLAW ARTICLE IX

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

1. Section 2230 (Table of Principal Use Regulations) by adding “and assisted care facility” to use #C.6; and amending footnote (ii)(2) in that section by reducing the front yard setback requirement for such uses from 150 feet to 50 feet.
2. Section 2210 (Principal Use Regulations) by adding the word “residential” after the word “placed on a” in the third sentence so that sentence reads as follows: “Not more than one principal structure shall be placed on a residential lot, except in accordance with sections 2300 (Accessory Uses and Structures), 5300 (SRC) and 5400 (ISD).”
3. Section 2324 (Accessory Uses and Structures) by adding the words “or other structures” after the word “trailers” so that section reads as follows: “The temporary use of trailers or other structures for storage or office purposes is allowed where they conform to the procedural regulations adopted by the Board of Selectmen.”
4. Section 7000 (Definitions) definition of “Structure” by deleting the word “fences” from that definition so that it reads as follows: “Structure: A combination of materials assembled to give support or shelter, such as buildings, towers, masts, sheds, roofed storage areas, mechanical equipment, swimming pools, signs; but not including septic tanks and septic systems, and accessory facilities associated with the provision of utilities such as drains, wells, transformers and telephone poles.”
5. Sections 4130 and 4143 (Flood Plain Overlay District) to change the date of the “National Flood Insurance Program FIRM Flood Insurance Rate Map” and the “Flood Boundary and Floodway Map for the Town of Sudbury Community No. 250217” from November 20, 1998 to June 4, 2010 wherever such date occurs in those sections.;

or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: The above minor amendments to the Zoning Bylaw represent items that have been identified by various Town departments over the past few years as out of date or in need of clarification. The Planning Board sponsors a similar article every few years. The changes proposed do not change the intent of the major provisions of the Bylaw. A further brief description of each amendment follows:

1. The changes to “assisted care facility” and its required setbacks reflect a brief study of this use and a determination by the Planning Board that the use was not sufficiently defined in the Use Table, and the setbacks imposed were significantly more restrictive than any other use in the Bylaw. Given the aging demographics in the state and the region, the Town is better served by zoning for this use similarly to Nursing Homes.

2/3/4. These amendments to the Zoning Bylaw for the most part reflect minor changes to the provisions to make them more easily interpreted and enforced.

5. The final provision revises the date of the flood insurance rate maps for Sudbury. These maps have recently been revised by the Federal Emergency Management Agency (FEMA); however, the flood boundaries in Sudbury have not changed in any substantial area since the 1998 maps. The date of the maps must be updated or Sudbury residents could potentially be unable to obtain flood insurance under the federal program.

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

**ARTICLE 21. AMEND ZONING BYLAW ARTICLE IX, SECTION 4300 –
WIRELESS SERVICES OVERLAY DISTRICT**

To see if the Town will vote to amend Article IX (the Zoning Bylaw), Section 4300 (Wireless Services Overlay District) as follows:

1. Section 4330. Location, by deleting the words “owned by the Town of Sudbury, which is held in the care, custody, management and control of the Board of Selectmen, Park & Recreation Commission, and parcels of land owned by the Sudbury Water District, as of the effective date of this Bylaw,” and by adding the following parcels of land to be included in the overlay district:
 4336. Lincoln Sudbury Regional High School, Assessor’s Map No. F11, Parcel 0014 (within 200 feet of a developed recreation field only)
 4337. Town of Sudbury Land located behind Ti-Sales, Assessor’s Map No. G09, Parcel 0200
 4338. Sudbury Water District land off East Street, West Street, Center Street and Hollow Oak Drive, Assessor’s Map No. Map H07, Parcel 240; Map H06, Parcel 0800; and Map G06, Parcel 0001
2. Section 4334 to exclude parcels identified as Assessor’s Map No. L08, Parcels 008 and 009, and Assessor’s Map No. M08, Parcel 021, located in the Raymond Road well field/Feeley Park area.
3. Section 4345 to delete the word “or” between the words “cells or panels, and add the words “equipment buildings or cabinets” after the word “panels”, so that section reads as follows:

“Changes in the capacity or operation of a wireless service facility which has previously received a special permit under this Bylaw, limited to an increase or decrease in the number of antennae, cells, panels, equipment buildings or cabinets, or the number of service providers (co-locators), shall be permitted, subject to Site Plan review under section 6300 of the Zoning Bylaw and authorization from the lessor of the property.”
4. Section 4371 to add the word “and adjacent public roadways” at the end of that section so it reads as follows:

“A color rendition of the proposed facility with its antenna and/or panels at the proposed location is required. One or more renditions shall also be prepared illustrating the visual effects of the facility from prominent areas and adjacent public roadways.”;

or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: These amendments are proposed in order to protect the Town against undesirable cell tower sitings in inappropriate locations. Cellular service providers are still scouring the Town for new sites. As the industry evolves, customers are demanding robust coverage, particularly at their residences. Customers also are becoming accustomed to wireless services that require new infrastructure that can carry large amounts of data. The properties contained in the original 1998 overlay district have been almost completely developed, and the cellular companies are looking elsewhere in Sudbury for additional sites to improve their networks. We are again trying to proactively locate new sites that meet the purposes of the bylaw – minimize the visual impacts of cell towers, avoid potential damage to adjacent properties, and promote shared use of equipment in order to reduce the overall number of facilities in Sudbury – and satisfy the needs of the industry and its subscribers. The parcels proposed for new tower locations are all on municipal property that belongs to either the Town, the Sudbury Water District, or Lincoln-Sudbury Regional School District. They are

located in areas that experience subpar service, as identified by a town-wide study by the Town. These sites were selected because they are large enough or secluded enough to mitigate disturbance to neighboring residential properties. Enabling carriers to apply for permits to use these new sites enhances the Town's control over the placement of wireless facilities. Further, adding these sites to the overlay district will give Town Boards a stronger legal defense if they choose to deny applications on properties outside the overlay district. Given the nearly full utilization of the original parcels in the overlay district, we will be vulnerable to legal challenges if we do not judiciously expand the district.

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

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

ARTICLE 22. LONG-TERM CELL TOWER LEASING

(Consent Calendar)

To see if the Town will vote to authorize and direct the Town Manager, with the approval of the Selectmen, to enter into long-term leases or interests in real estate with telecommunications or holding companies for the purpose of siting, establishing or renewal of approved cell tower/wireless services facilities on Town land; or act on anything thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: Article 22 and Article 23 are companion articles 1) allowing the Town to provide for new cell tower leases and/or locations on Town land in accordance with the Zoning Bylaw and to continue existing land leases beyond the ten-year period limitation of statute, and 2) authorizing the Board of Selectmen to submit a Home Rule Petition (Special Act) to allow the Town to negotiate term extensions and payment thereof satisfactory to the Town for existing cell tower leases bid originally under c.30B without rebidding.

The Town presently receives yearly income from cell towers located on two sites: a single tower at the Landfill providing for one primary tenant and three co-locators, in addition to providing space for the Town's public safety equipment; and a single tower at Feeley Field off Raymond Road providing for a primary tenant and one co-locator. All leases were initiated under the c.30B, the procurement statute.

The intent of these articles is to continue the current practice of leasing Town land for these uses, and to allow the Town to more favorably negotiate extensions of leases to maximize income from these sources. The potential leases represent substantial income to the Town. Based upon present leases, there is potential to exceed \$1M over a 10-year period.

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 23. SPECIAL ACT – CELL TOWER BIDDING

(Consent Calendar)

To see if the Town will vote to petition the Great and General Court of the Commonwealth of Massachusetts to allow the renewal of leases with telecommunications companies without the necessity of compliance with Chapter 30B, and to authorize the Town to enter into future long-term leases with telecommunications and/or holding companies which are initially bid pursuant to Chapter 30B; or act on anything relative thereto.

Submitted by Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: See report under Article 22. The Board of Selectmen unanimously supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 24. ESTABLISH STRETCH ENERGY CODE

To see if the Town will vote to adopt/amend the Town Bylaws and/or accept the stretch energy code established by the Commonwealth pursuant to 780 CMR Appendix 120.AA.; or act on anything relative thereto.

Submitted by the Board of Selectmen.

Majority vote required)

BOARD OF SELECTMEN AND GREEN RIBBON ENERGY AND SUSTAINABILITY COMMITTEE REPORT: The Stretch Code is an alternative energy code based on national standards that has been established as an appendix to the current Massachusetts Building Code (CMR 780). The Stretch Code provides a uniform local option to improve the energy efficiency of buildings over the base code. Adopting the stretch code is a requirement to qualify as a Green community in accordance with the Massachusetts Green Communities Act of 2008.

The principal difference between the stretch code and the base energy code is a set of performance requirements for new residential and commercial construction. Residential additions and renovations are covered, but have lower performance standards, and may use prescriptive measures instead. Small commercial buildings under 5,000 sq., ft. are exempt, and medium-size commercial buildings have the option of meeting the large-building performance standard or an alternative prescriptive code. The prescriptive code is based on the 2009 IECC code already in force in Massachusetts since January, 2010.

Meeting the stretch code requirements for new construction would yield an approximate 20% improvement in energy efficiency over the same home built according to the current base energy code. Compliance with the stretch code can be readily accomplished using existing construction materials and methods. Many homes in Massachusetts are presently being built to Energy-Star standards, on which the stretch code is based.

Adopting the stretch code now, rather than waiting for it to become the standard in the near future, has three main benefits to Sudbury: 1) It acts on the Town's commitment to energy efficiency, sustainability and environmental responsibility; 2) It helps build a lower-energy, higher-value housing stock; and 3) It meets one of the five criteria to become a "Green Community" as defined by Massachusetts DOER, which in turn confers eligibility for various grants and other assistance related to energy conservation and sustainability.

Implementation of the stretch code is cost neutral to the Town. Using performance data instead of prescriptive measures for new residential construction may in fact slightly reduce inspection time. Increases in construction costs due to the stretch code are modest, and offset by life-cycle energy cost savings. Compliance with the stretch code is projected to add about \$8,000 to the cost to build a 2,672 sq. ft. house (about \$3.00/sq.ft.), and produce an annual savings of about \$1,300.

The proposed amendment to the first paragraph of Article XV of the Town Bylaws, if voted by Town Meeting, is as follows (change underlined):

“ARTICLE XV BUILDING CODE

This article is replaced by the State Building Code, which is incorporated herein by reference, adopted under Chapter 802 of the Acts of 1972, including 780 CMR, Appendix 120.AA “Stretch Energy Code”, and the following sections:”

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 25. RENEWABLE ENERGY DEVELOPMENT FACILITIES

To see if the Town will vote to allow for the siting of renewable or alternative energy generating facilities, including but not limited to solar or wind; renewable or alternative energy research and development facilities, including but not limited to solar or wind; and authorize and direct the Town Manager and Selectmen to negotiate and/or contract with a company or companies to provide energy facilities on available Town lands and/or to authorize the Town to take whatever steps are necessary to enter into long-term leases of twenty-years or greater with qualified companies capable of providing the foregoing; and/or to amend the Town Bylaws to accommodate such facilities; and to authorize the Town to take necessary steps to qualify the Town as a Green Community pursuant to the statutes of the Commonwealth and rules promulgated thereunder; or act on anything relative thereto.

Submitted by the Board of Selectmen.

(Majority vote required)

BOARD OF SELECTMEN REPORT: This article will allow the Selectmen and Town Manager to take whatever steps necessary, including the submittal of a Home Rule Petition (Special Act), to permit the Selectmen and Town Manager to negotiate or enter into long-term agreements and/or leases or interests in land with a renewable energy developer.

The Town is interested in developing sources of renewable energy to lower its energy costs by taking advantage of available Federal, State and private incentives, and to act responsibly with respect to the global environment. One measure under consideration is to place a large (approximately 2.5 megawatt) photovoltaic (PV) array on the 17-acre capped landfill. Because of the incentives available, such an array may have an attractive payback in the form of savings on future costs, but will require a significant upfront investment. Since private enterprises can accrue tax credits not available to municipalities, one attractive mechanism to capture the advantages of renewable energy generation while limiting the upfront capital required is to enter into a PPA (Power Purchase Agreement). Under such an agreement, a municipality leases land to an energy developer who installs and maintains the energy generating facilities and sells the power back to the municipality at a price competitive with the prevailing commercial rate.

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

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

**ARTICLE 26. ACCEPT M.G.L. c.272, §73A – REMOVAL OF GRAVESTONES
FOR REPAIR**

(Consent Calendar)

To see if the Town will vote to accept M.G.L. c.272, §73A which would allow removal of gravestones and other memorials for repair or reproduction in accordance with State rules and regulations without penalty; or act on anything relative thereto.

Submitted by the Sudbury Historical Commission.

(Majority vote required)

SUDBURY HISTORICAL COMMISSION REPORT: Passage of this article would allow the Town to approve the transfer of certain historical gravestones for the purpose of repair off site by a professional Conservator. As repair of some of the broken stones under contract for conservation is more complicated, the Town desires to

have these services performed off site by the Conservator in accordance with the rules and regulations promulgated by the State Secretary.

Section 73A reads as follows: “In any city or town which accepts this section, the provisions of section seventy-three shall not prohibit the removal, in accordance with rules and regulations promulgated by the state secretary, of a gravestone or other structure or thing which is placed or designed as a memorial for the dead, for the purpose of repair or reproduction thereof by community sponsored, educationally oriented, and professionally directed repair teams.”

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 27. CONSTRUCT POLICE HEADQUARTERS

To see what sum the Town will vote to raise and appropriate, or appropriate from available funds, to be expended under the direction of the Permanent Building Committee, for the purpose of constructing a new Police Department Headquarters and appurtenant structures on Town-owned land adjacent to the existing Fire Headquarters, purchasing additional equipment, technology, and furniture, landscaping, and all expenses connected therewith, including professional, engineering, and architectural services and preparation of plans, specifications and bidding documents, supervision of work, and relocation, and to determine whether said sum shall be raised by borrowing or otherwise; or act on anything relative thereto.

Submitted by the Board of Selectmen and Police Chief. (Two-thirds vote required, if borrowed)

BOARD OF SELECTMEN REPORT: This article requests funds for the design and construction of a new Police Headquarters of approximately 14,540 sq. ft. on Town-owned property at 77 Hudson Road, adjacent to the Fire Headquarters building. A prior proposal to exempt debt so as to construct an 18,500 sq. ft. facility on this site was approved by Town Meeting in April, 2007, but was subsequently defeated in a special election on October 16, 2007. The Board of Selectmen then created a 13-member Police Station Blue Ribbon Committee to examine the prior planning that went into the proposed \$8.2 million project to determine what, if any, alternatives should be presented to Town voters. The complete Committee report is available on the Town’s website.

Between November, 2007 and February, 2008, the Committee revisited the existing facility; toured and analyzed the features of recently-constructed facilities in Hopkinton, Hanson and Acton; interviewed personnel using these facilities at length; reviewed research by individual members; and developed an iterative series of five design options to define Sudbury’s needs in a police facility and develop the best approach to address those needs.

The Committee confirmed the structural and functional deficits of the existing facility presented to the 2007 Annual Town Meeting. The building lacks adequate space for its present-day function, and is in need of major repairs, design upgrades and infrastructure revisions to meet current standards and demands, including handicapped accessibility.

The Committee reviewed the rationale for each element of space contained in the proposed design, and developed an iterative series of design options to incorporate the needed functional elements, spaces and flow patterns in a more cost-effective configuration. Options explored included expanding and remodeling the existing facility, and new construction on both the existing site and the previously-proposed Hudson Road site.

The present proposal for a 14,540 sq. ft. new facility to be built on the previously-proposed site adjacent to the main Fire Station represents the unanimous recommendation of the Committee as the most cost-effective approach to addressing the Town's need for a functional Police Headquarters that meets current codes and standards. The proposed design is illustrated in the Blue Ribbon Committee Report.

Important improvements the proposed facility affords over the existing Police Headquarters include proper facilities for community interface and separation of police and public traffic, provision for safe handling of detainees and detention facilities that meet code, adequate and secure space for evidence processing and storage, adequate workspaces and locker facilities for personnel, appropriate space for expanding technology, provision for combined police and fire dispatch, a combined public meeting, training and emergency command center, and ADA compliance.

The proposed building provides the elements of space and work flow patterns required in a present-day Police Headquarters at significantly reduced size and cost from the prior proposal. As illustrated in the Blue Ribbon Committee Report, the size and cost of the proposed facility also compare favorably with other recently-constructed police stations in Massachusetts towns with features similar to Sudbury. The problems with the existing Police Headquarters must be addressed; solutions will not become less expensive, and construction of a new Police Headquarters has been included in the Town's planning for a level debt load.

The Permanent Building Committee has commissioned a professional cost estimate and after review established a project cost of \$6.7M, borrowing cost not included, if construction of this design scheme were to commence in the spring of 2011.

BOARD OF SELECTMEN POSITION: The Board of Selectmen unanimously supports this article, but will report at Town Meeting on several issues that could affect the timing and funding of this project.

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

ARTICLE 28. WASTEWATER FEASIBILITY STUDY

(Consent Calendar)

To see if the Town will vote to raise and appropriate or appropriate from available funds, \$90,000, or any other sum for the purpose of retaining professional engineering services to prepare a Project Evaluation Report which may include initial plans or drawings for wastewater management for some or all of the Route 20/Union Avenue business district, and all expenses connected therewith, to be raised by transfer from the balances remaining from prior article authorizations voted at a prior Town Meetings, which projects have been completed, or otherwise; or act on anything relative thereto.

Submitted by the Town Treasurer and Board of Selectmen.

(Majority vote required)

TOWN TREASURER REPORT: The transfer balances in these prior capital articles represent amounts not used due to project savings or cancellations.

1. \$ 4,378.49, approved under Article 8, FY05 Capital Budget, of the 2004 Annual Town Meeting;
2. \$ 1,255.86, approved under Article 10, FY06 Capital Budget, of the 2005 Annual Town Meeting;
3. \$34,152.26, approved under Article 8, FY07 Capital Budget, of the 2006 Annual Town Meeting;
4. \$15,365.68, approved under Article 5, FY08 Capital Budget, of the 2007 Annual Town Meeting;
5. \$34,847.71, approved under Article 6, FY09 Capital Budget, of the 2008 Annual Town Meeting;

BOARD OF SELECTMEN REPORT: This article was previously approved as Article 24 of the 2002 Annual Town Meeting. The original article in 2002 contained two separate phases of study for the Route 20 wastewater project: (1) preliminary site evaluations (soil testing) on several properties, and (2) completion of a Project

Evaluation Report (PER), as required by the Department of Environmental Protection. Task #1 has been completed with the use of donated funds from Sudbury businesses and a grant from the Sudbury Foundation. We are now ready to proceed with task #2, the PER. The funds under the original article approved in 2002 were contemplated to be borrowed and repaid over a 5-year period. Borrowing never occurred due to the donations received. Those donated funds have been expended (over \$30,000), and the project has progressed to this next stage. Recovery of funds from older, unused capital articles can replace the necessary funds needed for the PER. The Route 20 wastewater project is a vital strategy in the goal to attain economic sustainability in Sudbury, and we are closer to reaching this goal than ever before. We urge your support.

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

ARTICLE 29. RESCIND/AMEND BORROWINGS

(Consent Calendar)

To see if the Town will vote to rescind the votes authorizing borrowing taken under Article 27 of the 1997 Annual Town Meeting and Article 24 of the 2002 Annual Town Meeting and amend the authorization voted under the following articles:

1. Article 32B of the 2003 Annual Town Meeting, by reducing the amount appropriated thereunder by the sum of \$6,500;
2. Article 7A of the 2001 Annual Town Meeting, by reducing the amount appropriated thereunder by the sum of \$3,800;
3. Article 11 of the 2005 Annual Town Meeting, by reducing the amount appropriated thereunder by the sum of \$13,500;
4. Article 49 of the 2005 Annual Town Meeting, by reducing the amount appropriated thereunder by the sum of \$30,000;

or act on anything relative thereto.

Submitted by the Town Treasurer.

(Majority vote required)

TOWN TREASURER REPORT: The borrowings included in these articles were not required to be made. In order to eliminate these liabilities from the books, a Town Meeting vote to rescind or reduce the borrowing authorization is needed.

The items listed to be rescinded represent borrowings that were not required because the projects or programs were subsequently cancelled:

- \$200,000, approved under Article 27, Septic System Betterment Loan Program, of the 1997 Annual Town Meeting;
- \$90,000, approved under Article 24, Wastewater Feasibility Study, of the 2002 Annual Town Meeting.

The items listed to be amended represent a reduction in borrowings because of project, program or bond issuance cost savings:

1. Article 32B, Dickson Land Purchase (CPA funded), of the 2003 Annual Town Meeting;
2. Article 7A, Public Works Facility, of the 2001 Annual Town Meeting;
3. Article 11, Capital Items-Debt Exclusion, of the 2005 Annual Town Meeting;
4. Article 49, Libby Land Purchase (CPA funded), of the 2005 Annual Town Meeting.

If Article 28, Wastewater Feasibility Study, is not passed by Town Meeting, the motion to be made under this article will not include rescinding the vote to authorize borrowing under Article 24 of the 2002 Annual Town Meeting.

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

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

ARTICLE 30. COMMUNITY PRESERVATION FUND – TOMB DOOR(S) RESTORATION

To see if the Town will vote to appropriate an amount not to exceed \$30,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of restoring the vandalized tomb doors along Concord Road in the Town Center and at Wadsworth Cemetery, in addition to allowing any funds collected under court –ordered restitution be returned into the Community Preservation Act fund, or off-set against the appropriation hereunder, or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from Historic Reserves.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the restoration of the vandalized tomb doors along Concord Road in the Town Center and at Wadsworth Cemetery. Restoration will involve utilizing similar materials and bonding agents to retain the antique appearance of the doors. The CPC believes that these severely damaged historic assets are unique, irreplaceable and worthy of restoration.

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

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

**ARTICLE 31. COMMUNITY PRESERVATION FUND – REVOLUTIONARY WAR CEMETERY
RADAR SEARCH**

To see if the Town will vote to appropriate an amount not to exceed \$20,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of conducting a ground penetrating radar survey to identify unmarked graves at Sudbury’s historic Revolutionary War Cemetery, or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from Historic Reserves.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund a ground penetrating radar survey at Sudbury’s historic Revolutionary War Cemetery to identify unmarked graves of Sudbury’s earliest citizens. Based upon listings in historical documents and journals, a large grassy area and some smaller areas that appear to be unused are thought to contain a number of graves, and perhaps grave markers as well that have sunk below the surface. This project will continue the work to restore and document the Revolutionary War Cemetery and ensure protection of a historic, cultural, and archaeological resource of significance to the town. Funds from this article will also be used to temporarily mark and preserve with basic preservation techniques the sites as required.

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

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

ARTICLE 32. COMMUNITY PRESERVATION FUND – UPGRADE EXISTING TOWN HALL VAULTS

To see if the Town will vote to appropriate an amount not to exceed \$67,795 from the Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of upgrading two existing vaults located in the Town Hall with shelving, climate control and fire suppression systems, or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from Historic Reserves.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the upgrade of two existing vaults located in the Town Hall with appropriate shelving, climate control and fire suppression systems that they currently do not have. Massachusetts General Law requires municipalities to provide and maintain fireproof rooms, safes or vaults for the safe keeping of the public records of their department, county, city or town. When equipped with appropriate climate control and fire suppression systems, these vaults will protect and preserve the historic, cultural, and archaeological resources in the possession of the Town of Sudbury. The existing condition of the vaults leaves the Town's historic treasures at risk. Town Meeting has previously appropriated CPA funds for the preservation of a portion of the most-used historic documents, and will hopefully approve similar efforts in the future. Appropriate storage conditions are a part of this ongoing effort.

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

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

ARTICLE 33. COMMUNITY PRESERVATION FUND –TOWN HALL ARCHITECTURAL DESIGN STUDY

To see if the Town will vote to appropriate an amount not to exceed \$50,000 from the Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of completing a Phase 1 architecture and feasibility study of the Town Hall for the renovation, including historic rehabilitation, and restoration of the building, or act on anything relative thereto. All appropriations will be allocated to the Historic category and funded from FY11 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town Hall is a significant historic asset of the Town. Adaptive reuse of the building, including historic rehabilitation and restoration, is a long-term goal of the Board of Selectman. Town Meeting has previously approved allocating CPA funds to the historic restoration of the building's second floor windows. The study funded by this article will identify needed repairs to the building as it is currently used, and make recommendations for maximizing the utility of the building to the Town going forward over the next several decades, providing cost estimates for any work proposed. Any resulting project proposal would be eligible for CPA historic funds to the extent covered by statutory requirements, and would require the approval of a future Town Meeting.

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

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

ARTICLE 34. COMMUNITY PRESERVATION FUND – SUDBURY HOUSING TRUST
10% ALLOCATION

To see if the Town will vote to appropriate an amount not to exceed \$180,000 of Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the purpose of providing funds to the Sudbury Housing Trust in support of its efforts to provide for the preservation and creation of affordable housing, or act on anything relative thereto. All appropriations will be allocated to the Community Housing category and funded from FY11 Revenue.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the Sudbury Housing Trust using the ten percent (10%) of FY11 anticipated revenues that the Act requires be set aside for affordable housing. The Trust was created at the 2006 Annual Town Meeting, provided with start-up funding at the 2007 Annual Town Meeting, and funded with the ten percent (10%) allocation in 2008 and 2009. As before, this appropriation will go toward implementing the Housing Trust's multi-pronged housing strategy. The goal of all these community housing efforts is to make progress toward the state-mandated number of affordable housing units in Town, and to provide an increased diversity among Sudbury's housing options. The CPC understands that as long as progress is not made toward that goal, the Town suffers a lack of control over not only the location, but also the construction parameters of multi-unit housing (40B developments) anywhere in Town.

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

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

ARTICLE 35. COMMUNITY PRESERVATION FUND – TOWN-WIDE WALKWAYS

To see if the Town will vote to appropriate an amount not to exceed \$200,000 from the Community Preservation Act funds, as recommended by the Community Preservation Committee, for the purpose of constructing new walkways within the Town, such design and construction to be guided by the spirit and intent of the Town of Sudbury 2001 Master Plan, the February 2000 Report of the Walkway Committee, the July 2005 Sudbury Board of Selectmen directive regarding public works projects on Scenic Roads, and by recommendation of the Town of Sudbury Planning Board, the Director of Planning and Community Development, and the Director of the Department of Public Works, or act on anything relative thereto. All appropriations will be allocated to the Recreation category and funded from unrestricted reserves.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to fund the engineering, design and construction of priority *new* walkways within the Town. The walkways funded will be selected by the DPW Director, with the recommendation of the Planning Board, from the list of walkways identified in the February 2000 Report of the Walkway Committee. The CPC firmly believes that the design and construction of walkways should be guided by the spirit of the Town's 2001 Master Plan as it pertains to Town character, and by the July 2005 directive from the Board of Selectmen regarding public works projects on Scenic Roads. Town Meeting has approved Community Preservation Act funds for walkway construction in FY05, FY07 and FY09. The CPC believes that Sudbury's walkways provide a relatively low-maintenance/low-operational cost opportunity for neighborhood recreation. This opportunity, in addition to the safety benefits that walkways confer, contributes greatly to the quality of life in Town, and has been repeatedly identified as desirous by residents not only at Town Meeting, but in other forums and studies as well.

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

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

**ARTICLE 36. COMMUNITY PRESERVATION FUND –
CSX ALTERNATIVE ACQUISITION FUNDING**

To see if the Town will vote to appropriate the sum of \$420,000 of Community Preservation Act funds, as recommended by the Community Preservation Committee, from unrestricted reserves and allocated equally to the categories of Open Space and Recreation, to allow for the payment of notes issued to fund the acquisition without the necessity of bonding as authorized and borrowed under Article 32 of the April 8, 2008 Annual Town Meeting; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article adds an alternative method of payment for the acquisition of the CSX railroad corridor as approved in 2008 allowing either borrowing, as approved in the original article, or payment from the CPA unrestricted reserves account. In 2008, it was anticipated that both the CSX and the Nobscot purchases would occur simultaneously and both would be included in the same bond issuance. The Nobscot purchase went forward as planned, but the CSX negotiations have taken much longer. Therefore, flexibility in the type of payment, depending on the timing, is recommended.

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

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

**ARTICLE 37. COMMUNITY PRESERVATION FUND – AMEND ARTICLE 29 OF THE 2008
TOWN MEETING, TOWN HALL WINDOW RESTORATION**

(Consent Calendar)

To see if the Town will vote to amend Article 29 of the 2008 Town Meeting by removing the time for completion of the project, as recommended by the Community Preservation Committee; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an extension on the time limit of Article 29 of the 2008 Town Meeting. Extension is necessary due to the investigation of restoration methods for the lowest cost. The Town's Building Inspector is confident that the project can be completed by the end of FY11 (June 30, 2011). The CPC prefers to leave the completion date open-ended at this time.

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

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

ARTICLE 38. COMMUNITY PRESERVATION FUND – REVERSION OF CPA FUNDS

(Consent Calendar)

To see if the Town will vote to return the unused balances from prior article authorizations voted at prior Town Meetings, which projects have been completed, or otherwise, into the CPA unrestricted reserves account:

2004 ATM, Article28	Town Walkways	\$ 23.74
2006 ATM, Article40	Loring Parsonage Exterior Renovation	\$ 69,641.00
2005 ATM, Article 48	Historic Properties Survey Phase II	\$ 2,223.78
2007 ATM, Article 22	Bruce Freeman Rail Trail Title Search	\$ 812.11
2008 ATM, Article 25	Town Clerk Document Preservation	\$ 50.00
2008 ATM, Article 26	Military Training Field	\$ 1,735.00
2008 ATM, Article 28	Stearns Mill Dam Evaluation	\$ 0.82;

or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The above articles appropriated more than was actually spent on the various projects, or in the case of the Loring Parsonage article, a new and different article was approved. All projects are completed at this time. In order to return the funds to the CPA general account, this article and an affirmative vote of Town Meeting are necessary.

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

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

ARTICLE 39. COMMUNITY PRESERVATION FUND – GENERAL BUDGET AND APPROPRIATIONS

To see what sum the Town will vote to appropriate from Community Preservation Act funds, as recommended by the Community Preservation Committee, for the FY11 Community Preservation Act budget; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article sets forth the entire FY11 CPA budget, including appropriations and reservations as required in connection with the administration of the CPA funds. The article appropriates funds for FY11 debt service obligations totaling \$1,052,035. These obligations arise from prior Town Meeting approval for the bonding of four projects: 1) purchase of the Dickson property utilizing the Open Space (\$16,132) and Historic Preservation (\$10,754) categories; 2) purchase of land and development rights as well as construction of a sports field on the Cutting property utilizing the Open Space (\$372,993) and Recreation (\$46,100) categories; 3) purchase of the Libby property utilizing the Open Space (\$212,688) category; and 4) purchase of development rights on the Nobscot Boy Scout Reservation utilizing the Open Space (\$393,367) category.

The article also appropriates funds for administrative and operational expenses of the CPC in the amount of \$80,000. The administrative fund can be used by the CPC to pay for technical staffing and expertise, consulting services (e.g. land surveys and engineering), property appraisals, legal advertisements, publication fees and other administrative expenses. By statute the CPC can budget up to five percent (5%) of its annual budget for administrative expenses, or \$90,300 based upon the revenue projection of \$1,806,000 in FY11. Any funds remaining in the administrative account at fiscal year end revert back to the CPA Fund Balance, as they have in previous years, and need to be re-appropriated for administrative use in subsequent years. The CPC believes that having access to administrative funds is critically important, in that it allows it to conduct business on a time-sensitive basis - a vital component of the CPA.

The article may also reserve the requisite statutory minimum of ten percent (10%) of the CPA budget in each of the core CPA categories of Open Space, Community Housing and Historic Preservation. This minimum is

mandated by the State CPA statute, and funds not spent in each of these three core categories must be reserved for future expenditure in those same categories. The actual amount reserved each year depends upon whether or not that Town Meeting has appropriated money totaling less than 10%, or not appropriated any money at all, in any of these three core categories. If there is a balance of unspent CPA funds from that fiscal year after such reservations and after Town Meeting has voted the CPA articles, it is budgeted in the unrestricted reserve account for future CPC projects in all three categories. To date, only the Historic category includes Reserves.

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

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

ARTICLE 40. REDUCE CPA SURCHARGE FROM 3% TO 1.25%

To see if the town will vote to approve an amendment reducing the amount of the surcharge imposed on real property pursuant to Massachusetts General Law Chapter 44B (the Community Preservation Act) from 3% to 1.25%; or act on anything relative thereto.

Submitted by Petition.

(Majority vote required)

PETITIONERS' REPORT: This article asks Sudbury voters to support a property tax reduction by reducing Sudbury's participation in the Massachusetts Community Preservation Act (CPA). This article proposes the CPA property tax surcharge (tax on tax) be reduced to 1.25% from the 3% (THREE) currently assessed. Each year, as a requirement of Sudbury's participating in the Massachusetts CPA, no less than 10% of the fund must be allocated to each of the following areas: (1) affordable housing, (2) acquisition and preservation of open space, and (3) acquisition and preservation of historic buildings and landscapes.

In fiscal year 2009, Sudbury taxpayers paid more than \$1,400,000 in CPA property tax surcharges. Since Sudbury voters adopted the CPA 7 years ago, Sudbury residents have paid more than \$8,500,000 in CPA surcharges.

Sudbury has made many investments as part of this program. As of 2009, Sudbury has more than \$10,000,000 in CPA related debt obligations outstanding, exclusive of Nobscot Phase II. If no early payment of the debt is made, this debt will cost the taxpayers of Sudbury an additional \$5,500,000 for a total of \$15,500,000.

As a result of the bonds issued for CPA land purchases, the interest expenditure of more than \$5,500,000 offsets the greater part of the match (benefit) Sudbury has received as part of its participation in the Community Preservation Act. It is projected the actual interest expense will trend higher. At the time this report was submitted, the petitioner(s) were unable to reconcile with the Town of Sudbury the difference in disclosures on interest costs when comparing what was disclosed in the FY10 Budget Report (Section 10, page 251), and the 2009 Community Preservation Committee report (page 18).

Considering projected investment income on the current CPA reserves of \$7,887,000 (at September 2009), the reduction to 1.25% still provides enough for debt servicing and a moderate amount for ongoing investment for small projects.

The petitioner(s) ask for your vote in support of this article in the interest of Sudbury taxpayers today and for those in the years to come.

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

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

ARTICLE 41. UTILIZE A PORTION OF CURRENT CPA FUNDS TO FULLY PAY BONDS FOR LIBBY LAND AND CUTTING FARM

To see if the town will vote to approve utilization of a portion of current Community Preservation Act reserve funds to pay in full the bonds issued for Cutting Farm and Libby Land purchases, made in 2005 and 2004, respectively via Sudbury's participation in the Community Preservation Act, pursuant to Massachusetts General Law Chapter 44B (the Community Preservation Act), or act on anything relative thereto.

Submitted by Petition.

PETITIONERS' REPORT: This article asks Sudbury voters to support the utilization of a portion of current Community Preservation Act reserve funds to pay in full the bonds issued for Cutting Farm and Libby Land purchases, made in 2005 and 2004, respectively via Sudbury's participation in the Community Preservation Act. Early payment of these bonds will avoid significant interest expenses currently obligated with the issuance of 20-year debt and save Sudbury taxpayers millions of dollars. The savings realized will permit reinvestment in Sudbury with CPA funds as was intended by the participation in adoption of the Community Preservation Act.

Each year, as part of Sudbury's participating in the Massachusetts CPA, no less than 10% of the fund must be allocated to each of the following areas: (1) affordable housing, (2) acquisition and preservation of open space, and (3) acquisition and preservation of historic buildings and landscapes.

In fiscal year 2009, Sudbury taxpayers paid more than \$1,400,000 in CPA property tax surcharges. Since Sudbury voters adopted the CPA 7 years ago, Sudbury residents have paid more than \$8,500,000 in CPA surcharges.

As of 2009, Sudbury has more than \$10,000,000 in CPA related debt obligations outstanding, exclusive of Nobscot Phase II. If no early payment of the debt is made, this debt will cost the taxpayers of Sudbury an additional \$5,500,000 for a total of \$15,500,000.

If these abovementioned bonds are paid per the current payment schedule, the interest expenditure of more than \$5,500,000 offsets the greater part of the match (benefit) Sudbury has received as part of its participation in the Community Preservation Act. It is projected the actual interest expense will trend higher. At the time this report was submitted, the petitioner(s) were unable to reconcile with the Town of Sudbury the difference in disclosures on interest costs when comparing what was disclosed in the FY10 Budget Report (Section 10, page 251), and the 2009 Community Preservation Committee report (page 18).

The petitioner(s) ask for your vote in support of this article in the interest of Sudbury taxpayers today and for those in the years to come.

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

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

ARTICLE 42. COMMITMENT OF FUNDING FOR FUTURE RAIL TRAIL STUDIES

To see if the Town will designate the \$25,000 previously allocated for rail corridor concept plans (Article 27 of the April 2009 Town Meeting), to investigate alternate trails/bypasses for those portions of the BFRT identified as having no meaningful mitigation alternatives (Town funded Call of the Wild Evaluation dated March 2009 with addendums).

Submitted by Petition.

PETITIONERS' REPORT: The 2007 Town Meeting funded concept studies, including Wetlands Delineation and a four season Wildlife Evaluation, for a rail trail conversion proposal designated as the Bruce Freeman Rail Trail. The Wetlands Delineation has not been publicly released; however, the flagging that has been completed indicates there is significant potential conflict of the proposed trail corridor with the Sudbury Wetlands Administration Bylaw and the state's Wetlands Protection Act. The Wildlife Evaluation has been publicly released and delineates specific, significant negative impacts of the proposed trail corridor on wildlife and habitats. The Evaluation concludes that for two specific sections of the proposed trail corridor, "there are no meaningful mitigation alternatives and the trail should be re-routed". There is no specific direction from the Town or from Town Management for Town Staff to study practical alternatives to reroute portions of the proposed corridor outside the areas of significant environmental impact. Approval of this article will insure Town Studies and/or Concept Plans for the BRFT are expanded to include opportunities, risks and benefits for alternate/bypass routes where current trail alignment it is in conflict with wildlife regulations and wetlands bylaws. It will insure minimum negative impact to the environment for any concept plan or design of the BFRT. Funding is already approved and appropriated in Article 27 TM 2009.

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

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

ARTICLE 43. ESTABLISH AND FUND COMMITTEE STUDY – FIREHOUSE #3

To see if the town will vote to approve establishment of a committee to evaluate the necessity, or alternative public safety utilization of Firehouse#3, and to raise and appropriate or appropriate from available funds, \$10,000 or any other sum, to engage a qualified consultant to conduct a public safety study of the necessity or alternative public safety utilization of Sudbury Fire House #3; or act on anything relative thereto.

Submitted by Petition.

(Majority vote required)

PETITIONERS' REPORT: This article asks Sudbury voters to vote to approve establishment of a committee to evaluate the necessity, or alternative public safety utilization of Firehouse#3 (117). Furthermore, the petitioners of this article recommend the authorization to fund (up to \$10,000) a public safety consultant to advise the established committee. It is not the petitioner(s) opinion to close Firehouse #.

This committee would be chartered to evaluate no more than 20 communities considered peer and identify best practices on providing excellent services that are consistent and cost effective. This evaluation would include a benchmark of these communities and the various structures of their public safety services, specifically fire. The Committee should include representation, as advisors, of the Fire Chief and a member of the Town Manager's office as they have overall budget responsibility of Sudbury's fire services within the public safety group. Because the Town Manager is an employee of the town and under the direction of the Board of Selectmen, the committee would make recommendations to the board of Selectmen for their consideration in how Sudbury's public safety services are modeled.

This article developed from the evidence that Sudbury's current fire department cost structure is not working, evidenced by more frequent than not closure of station #3 in the evenings. As stated from Sudbury's public safety officials, the evening closure of #3 was introduced to manage the overtime budget. Town officials have noted the evening hours were selected due to the lower risk and impact to response time during the latter time of the day. Other communities have taken similar strategies, so this should remain a consideration. However, additional strategies might be identified through a more detailed, independent evaluation of other communities to seek **best practices** of how others provide **excellent** public safety protection with a better managed budget.

Based on preliminary review of Town Services cost structure, which included evaluation of 2008 wage expenditures, the following are but a few points for consideration:

- Sudbury paid more than \$800,000 in overtime expenditures;
- More than 1/3 of town employees earnings included more than 20% of overtime and the range went as high as more than doubling base salary;
- Sudbury’s public safety expenditures rank amongst the highest in the state on various metrics according to the Massachusetts Municipal databank;
- To ensure the highest level of public safety protection and manage town budgets, the majority of peer communities utilize “on-call firemen”, with the exception of Sudbury. As one example, Sudbury had ONE on-call fireman compared to Wayland’s TEN. On-call firemen receive an annual stipend for “shift coverage” when call-ins occur for sick time, vacation, etc.

Excellent Public Safety Protection must be maintained. The petitioner(s) believe Sudbury could benefit from the identification of other best practices that should be introduced in the interest of Sudbury taxpayers and the necessity to better manage public safety expenditures. The petitioner(s) of this article ask for your support of this article.

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

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

ARTICLE 44. SPECIAL ACT – AMEND c. 131 OF THE ACTS OF 1994 TO INCREASE SELECTMEN MEMBERSHIP TO 5

To see if the Town will petition the Great and General Court of the Commonwealth of Massachusetts to amend Part III, Section 5 (a) of Chapter 131 of the Acts of 1994 by substituting the following: “There shall be a Board of Selectmen composed of five members elected for terms of three years each. At the next ensuing election held as part of the Annual Town Meeting after approval of the Special Act, three Selectmen shall be elected, one for two years, and two for three years, and thereafter electing their successors for three years.”; said legislation to take effect without further submissions to a Town Meeting; or act on anything relative thereto.

Submitted by Petition.

(Majority vote required)

PETITIONERS’ REPORT: There are a variety of reasons to vote in favor of a move to five Selectmen instead of three. First, a board of five members would allow for more full and open discussions. The dynamics of a three-member board has the potential to limit the ability to fully discuss matters when there is a divergence of opinion. Second, in a town that values its diversity, we would be more likely to see that diversity reflected on a board comprised of five members. Third, there are many communities with five-member boards of selectmen, including Wayland, Concord, Acton, Maynard, Stow, Carlisle, Boxborough, Northborough, Framingham, Wellesley, Lexington, and Hudson.

With the growth in population and the increased complexities of operating our Town, more and more time and effort is required of our elected volunteer officials. One only has to review the Board of Selectmen agendas and minutes to see that their workload is greater than ever.

The demands of real estate development, collective bargaining, housing production plans, town facilities maintenance, the list goes on and on are addressed by our Selectmen. These demands are in need of more attention than even the most capable Board of three selectmen could address in a timely manner. Five members would allow for more representation and coordination with the 92 committees and departments of the Town.

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

FINANCE COMMITTEE REPORT: The Finance Committee takes no position on this article.

ARTICLE 45. RESOLUTION - EXECUTIVE SESSION MINUTES

To see if the Town will vote to approve the following resolution:

RESOLUTION: Executive Session Meetings of the Board of Selectmen

Whereas: Town business is conducted by the Board of Selectmen in executive session, and minutes of executive session meetings are public documents which may remain secret as long as publication may defeat the lawful purposes of the executive session, but no longer.

Whereas: Meetings consisting solely of an executive session are posted physically in the Town Clerk's office at least 48 hours prior to the meeting as required by law, but residents must visit the Town Clerk's office during working hours to discover that the meeting will be held.

Whereas: In consequence of this posting practice, residents are frequently unaware when executive session meetings have been held and cannot formulate a request for specific information on the business conducted in these meetings.

Whereas: Minutes of an executive session meeting are available to a Town resident only when specifically requested by that resident from the Town.

Whereas: Minutes of executive session by law cannot be released until they have been reviewed and it has been determined that the publication will not defeat the lawful purposes of the executive session.

Whereas: Minutes of executive session are not currently reviewed on a predictable or determined schedule, neither by specifying when minutes of specific meetings should be reviewed for release nor by reviewing all reserved minutes for release at specific intervals.

Whereas: In consequence of this reviewing practice, release of minutes to the public may be delayed unnecessarily.

Whereas: The Board of Selectmen announce public meetings and post minutes from these meetings electronically, in addition to physically posting in the Town Clerk's office as required by law, to increase the accessibility and transparency of Town Government to all citizens.

THEREFORE, BE IT RESOLVED THAT:

The voters of Sudbury request that the Board of Selectmen establish a policy for the publication of executive session meeting notification and minutes which is consistent with the practice used for public meetings, requiring scheduled review of executive session minutes and facilitating availability of all public documents by electronic means.

Submitted by Petition.

PETITIONERS' REPORT: The current process of obtaining information on public business conducted in executive session of the Board of Selectmen is not clearly set forth, and is difficult for residents to navigate once they have made inquiries to discover it. In particular, most residents obtain information about the actions of Town Government online and rely upon notification of events; few have the ability to poll the Town Clerk's office to learn of executive session only meetings. Lack of scheduled review delays release of public information into the public domain. A clearly explained policy governing executive session proceedings by the Board of Selectmen would increase transparency and expand citizen understanding and involvement in Town Government.

TOWN COUNSEL OPINIONS

It is the opinion of Town Counsel that, if the Bylaw amendments proposed in the following articles in the Warrant for the 2010 Annual Town Meeting are properly moved, seconded and adopted by a majority vote in favor of the motions, the proposed changes will become valid amendments to the Sudbury Bylaws:

- Article 6 Amend Bylaws, Town Meeting Commencement & Budget Submission
(Art. I, Town Meetings, Section 2, and Art. IV, Finance Committee, Section 5)
- Article 19 Amend Bylaws – Illicit Discharge and Connection
- Article 24 Amend Bylaws, Art. XV – Building Code (Stretch Energy Code)

It is the opinion of Town Counsel that, if the Zoning Bylaw amendments proposed in the following articles in the Warrant for the 2010 Annual Town Meeting are properly moved, seconded and adopted by a two-thirds vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Zoning Bylaw:

- Article 20 Minor amendments to Zoning Bylaw Art. IX, (Zoning Bylaw, Section 2230 –Table of Principal Use Regulations; Section 2210 – Principal Use Regulations; Section 2324 – Accessory Uses and structures; Section 7000 - Definitions; Sections 4130 and 4143 – Flood Plain Overlay District)
- Article 21 Amend Zoning Bylaw, Art. IX, Section 4300 – Wireless Services Overlay District

And you are required to serve this Warrant by posting an attested copy thereof at the Town Hall at least seven days before the time appointed for such meeting.

Hereof fail not and make due return of the Warrant by your doing thereon to the Town Clerk, at or before the time of meeting aforesaid.

Given under our hands this 2nd day of March, 2010.

SELECTMEN OF SUDBURY:

William J. Keller, Jr.

John C. Drobinski

Lawrence W. O'Brien

PART II

FINANCE COMMITTEE SECTION

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FY11 SECTION OVERVIEW

There are some noticeable changes to the Finance Committee section of the Town Warrant (the “FC” pages) this year. The objective is to provide taxpayers with the same historical trend information regarding operating expenses and metrics that the FinCom uses to evaluate the budget proposals and to provide more detail on the most significant budget data. A summary of the changes includes:

- Operating metrics for each Cost Center for the fiscal years ending June 2009, June 2010, and June 2011 (requested) including:
 - Average salaries.
 - Healthcare benefits for active and retired employees.
 - Student populations with detail on Sudbury, Lincoln, Metco, and other out-of-district students.
 - Cost per student for each school system.
 - Headcount by department and/or function for each Cost Center.
- The operating budgets of the two school systems are presented in similar formats to improve their readability.
- Detail on Community Preservation Fund cash flows, with information on sources of revenue, expenditures on Open Space, Community Housing and Historic Preservation, and cash balances.
- Compensation information for all employees, whether managers or not, making over \$100,000 a year in lieu of previously reported compensation information on managers making over \$80,000 a year.
- Town Department budgets are summarized in a format similar to the schools, eliminating over 20 pages of detail that we believe is insignificant on a relative basis to the overall budget for purposes of printing it in the Warrant. However, this information is still reviewed by the FinCom and is available in the budget document posted on the Town’s web site for those still interested in reviewing this level of detail.

Our objective is to reduce the volume of data and improve the relevance of the financial information in the delivered Warrant in the hope that more of you will have the time to review and consider it.

Two important caveats: this is Sudbury information, and metrics such as average teacher salaries and cost per student are calculated using the FinCom’s methodology. Since our numbers are not necessarily the same as those compiled by the Massachusetts Departments of Revenue and Education, the Warrant information is not always comparable to what you might find at the mass.gov web site. You cannot, for instance, compare the FinCom’s “cost per student” to the one available on the Mass DOE web site. If you want to compare Sudbury to other towns, use the mass.gov web site. If you want to compare Sudbury year over year on the benchmarks the FinCom follows, use the Warrant information. The other important caveat is that not all of these statistics are meaningful when used to compare the Sudbury Public Schools and the Lincoln-Sudbury Regional High School. The two school systems are inherently different because of the age and educational needs of their students. Most of the statistics the FinCom reviews are used solely for the purpose of identifying trends within a system and not between the systems.

We hope you find the new presentation useful and welcome any suggestions that you may have.

FINANCE COMMITTEE REPORT

Dear Resident of Sudbury,

This report will assist you in understanding Sudbury's fiscal year 2011 ("FY11") (July 1, 2010 – June 30, 2011) budget and the related financial articles that will be presented to you at Town Meeting beginning on April 5. We believe, above all, the participation of an informed voter is essential for Sudbury's democratic process and continued fiscal health.

The Finance Committee's (FinCom) role in Town government is to examine financial issues on behalf of Sudbury's residents, oversee the budget process, and make recommendations to you regarding the overall budget and all financial articles within the framework of the Town's needs and revenues. It is comprised of individuals with financial expertise and varying demographics.

This report is the culmination of a six-month budget process. In September, FinCom issued budget guidelines to the heads of the three key cost centers (Town of Sudbury, Sudbury Public Schools and Lincoln-Sudbury Regional School District). We asked each one to prepare two budget scenarios for FY11:

- A Non-Override Budget. The allowable growth in the non-override budget was set at 0% on January 29, 2010 based upon the release of the Governor's budget and expectations regarding reductions in State aid and local receipts as of that date.
- A 4.5% growth budget, which would limit the growth in operating expenses net of direct offsets to 4.5% over the prior year.

In addition, we asked for an update on how each cost center's actual costs were tracking against the FY10 appropriated budget. From October through March, we conduct budget liaison meetings between FinCom members and representatives of each of the cost centers. At these meetings, and through phone calls and emails, the liaisons and representatives of the Town departments and schools had in-depth discussions on budget matters. This process thoroughly familiarizes FinCom with the budget proposals so that we may guide residents through the numbers and respond to questions that are asked during the five weeks of public hearings and during the subsequent period leading up to Town Meeting.

What does the "4.5% budget" mean and where did it come from?

In early 2008, the Finance Committee concluded that the recent 6.5% per annum growth in the cost of operating the schools and the town was not sustainable and would likely lead to a series of no override votes that could have significant adverse consequences for the quality of our schools and other town services. The question was how to slow down the rate of growth in our costs? Operating the town and schools is a labor-intensive service business, and the principal driver of budget growth has been growth in the cost of employee compensation (i.e. wages and benefits). However, the Town's decision making process - an annual vote for a budget that typically meant either an override or layoffs - seemed incapable of providing any braking other than a hard stop. The reason: collective bargaining agreements (CBA's), which are typically negotiated every three years, were finalized prior to taxpayers being asked what they thought of the budgetary impact. Taxpayer approval of the labor contracts was sought when budgets were presented at the next Town Meeting, and which included new and higher labor costs that were baked into previously signed agreements. As a result, taxpayers were left either with the choice to fully fund the impact

of the contracts in an override or accept that a no override budget would result in layoffs and service level reductions.

In the fall of 2008, prior to the onset of the international financial and fiscal crisis, and in anticipation of the negotiation and renewal of all of the major Town and School labor contracts in 2009, the FinCom voted to recommend a spending growth limit of 4.5% per annum. This growth limit was meant to be a guideline for budget growth; a maximum, not a minimum. The Finance Committee publicly stated that it would vote against any operating budget proposal that represented growth of more than 4.5% above the previous year. This was not to say the FinCom would support a de facto 4.5% increase each year, but rather that the amount (up to 4.5%) to be supported in any given year would depend upon expectations for other revenues (State aid, local receipts, etc), the impact of any major changes in circumstances, and the overall impact on the property tax to the taxpayers of Sudbury. The objective of this budget growth guideline was to move the onus for determining spending growth levels from the taxpayer over to cost center management and the labor unions. At a minimum, any new contracts should fit within the announced spending growth limit, and hopefully come in below that threshold. Consequently, some of the burden of determining the level of layoffs was to be shifted from the taxpayer to management and the labor unions. While there might still be layoffs if the budget finally approved by taxpayers was less than 4.5%, the impact would be lessened if the contracts at least fit within that 4.5% framework.

To understand the impact of potential budget levels on both taxes and services this year, the Finance Committee asked for the preparation of two budgets that would “bracket” the range of possibilities: a no override budget and a budget assuming the spending growth limit of 4.5%. The “4.5% budget” provided the Selectmen and the FinCom with the information necessary to understand the cost of preserving services that might be lost in a no override budget and to assess the service value and tax trade-offs.

Recommended Budget

For FY11, we are recommending a Non-Override Budget of approximately \$79 million, which will mean a tax increase of 2.24% (\$235) for the average homeowner and a total increase in taxes of \$1,919,607 including new growth and commercial property taxes. We are recommending an override in the amount of \$1,753,625 for a total Override Budget of approximately \$81 million, which will mean a 4.92% (\$515) tax increase for the average homeowner and a total increase in taxes of \$3,673,232 including new growth and commercial property taxes. This will make up for the loss in revenues of \$1,909,240 and provide for an increase in operating budgets of 2.75% after two years of approximately 1.6% per year.

The Non-Override Budget is in compliance with Proposition 2½, which was approved by Massachusetts voters in 1980 and first implemented in fiscal year 1982 (M.G.L. Ch. 59, sec. 21c). It limits the amount of revenue a city or town may raise, or levy, from local property taxes each year to fund municipal operations without the approval of taxpayers. Proposition 2 ½ is not meant to be a “fiscally responsible spending benchmark”. Exceeding this level should not necessarily be construed with negative implications towards a town’s or a schools’ financial management. It is meant to reflect a “check and balance” point at the local level: town officials cannot raise taxes more than allowed under that Proposition without an affirmative vote of the taxpayers. To spend more money, town officials have to “make their case” to the taxpayers who can apply their own test of reasonableness by their votes at Town Meeting and the polls.

The Non-Override Budget represents an increase in the operating budget of 0.42% for each cost center compared to the FY10 budget whereas the average property tax will increase 2.24%. The Override Budget provides for an increase in those operating budgets of 2.75% whereas the average property tax will increase 4.92%. The disparity between tax increases and funding the operations of the town and schools is the result of a significant decline in projected non-property tax revenues, as follows:

- Reduction in Town and SPS State aid (projected at 7.5% below FY10 levels): \$ 426,002
- Reduction in local receipts (including excise taxes): \$ 717,146
- Reduction in State aid (at 7.5% below FY10) and free cash at LSRHS \$ 766,092
- Total revenue loss: \$1,909,240

Essentially, all of the taxes collected under a non-override budget will be used to replace the loss of the other revenues detailed above with very little remaining to cover increases in town and school operating costs.

The Override Budget represents a tax increase over last year of \$3,673,232 including new growth and commercial property taxes, which is comprised of three components:

- 1) \$1,909,240 to ameliorate the loss of other revenue sources so that we are at least back to FY10 levels.
- 2) \$1,705,492 to fund a 2.75% increase in the operating budget. While slightly higher than the operating budget increases of 1.6% in each of the last two years, it is substantially down from the 6.8% and 6.1% levels of FY07 and FY08.
- 3) \$58,500 to fund a modest contribution to the Town and LSRHS stabilization funds. If the experience of the last 18 months has taught us nothing else, it has shown the importance of having a cushion for unexpected setbacks. Equally important, the maintenance of our AAA credit rating requires that we have adequate cash reserves. Sudbury today operates with one of the lowest levels of reserves of AAA rated communities in Massachusetts, generally 2-3% of the operating budget as compared to the Board of Selectman’s target of 5% and the 5-10% recommended by our auditors.

Within the 2.75% increase in operating budgets we are recommending the same percentage increase for each cost center. This is a very important refinement of the spending growth limit concept, which says that absent major changes in circumstances, such as a significant change in student population, new service mandates imposed on the Town, etc, all cost center budgets should be growing at roughly the same rate. This is logical given that all three are labor-intensive services with 70-80% of their costs in labor. Limiting each cost center to the same percentage increase:

- Discourages overly generous labor contracts because the cost center with the larger contract settlement will have less money to spend on new hires (or reducing layoffs), technology, classroom materials, etc.
- Encourages each cost center to find ways to operate more efficiently by moving the budget away from a “cost plus” approach. Savings found within a cost center can be applied to better uses within that cost center as long as spending stays within the growth limit applied to all.

- Avoids the otherwise unfortunate result that one cost center might receive a bigger piece of the pie, over time, without any change in their relative contribution to town services.

Where are we today?

Over the past several years, the Town's fiscal situation has been severely constrained by increases in the cost of wages and benefits, which have risen much faster than the rate of inflation. As a result of having one of the highest levels of households with school age children in the State, we have a much higher demand for education services relative to other communities. On a comparative basis, Sudbury spends the 6th highest per capita amount on education and has the 4th highest level of education spending, as a percentage of its budget, in the entire State. That said, our spending on schools and services as measured on a per student basis is in line with, or lower than, our peers.

However, our cost structure is constrained by the fact that our revenue structure is heavily dependent on property taxes with only 7% of Sudbury's total revenues coming from commercial property taxes and 70% coming from residential taxes. As a result, residents bear the brunt of any tax increases.

In the short-term, it is unlikely that our non-residential tax revenues will see any meaningful increases given the current economic climate and the potential continued decreases in local receipts and State aid. For the past two years, these non-residential tax revenues have decreased substantially. As a result, the Finance Committee believes the Town will increasingly be confronted with three alternatives:

- Additional overrides to fund our ongoing level of services given current organizations and cost structures;
- Reductions to staff, and therefore services, within our current organizations and cost structures in order to fit within the constraints of Proposition 2 ½ and avoid overrides; or
- Changes to our current organizations and cost structures that enable our Town to deliver substantially (but perhaps not completely) the same level of services at a lower overall cost.

The Finance Committee believes that achieving the latter of these three alternatives is imperative if we are to minimize the former alternatives. We supported the Board of Selectmen as they established the Budget Review Task Force in 2007 to examine the Town's structural deficit. This task force examined both revenues and expenses and produced recommendations that may have the potential to improve the Town's long-term financial position. A copy of their final report is available via a link on the Town's website home page. Below we have highlighted four of their recommendations that we suggest should continue to be evaluated carefully to determine if changes in these areas could improve the Town's fiscal position.

- Pursue a more efficient economic model, which will support long-term excellence in schools and town services by considering regionalization, collaboration and consolidation to reduce costs by utilizing shared resources where appropriate.

- Reduce our healthcare expenses either by joining the Massachusetts Group Insurance Commission (the “GIC”) or implementing a plan which has a sustainable cost structure equal to, or better than, the GIC.
- Enhance Sudbury’s commercial district with a wastewater treatment plan and zoning/planning which would result in tasteful development to complement the character of Sudbury and increase our commercial tax base.
- Invest in renewable energy sources, which will provide long-term revenue and cost-reduction opportunities for Sudbury.

The Selectmen and School Committees have already begun the process of implementing several initiatives including reductions in the rate of growth in wages, reductions in the cost of employee health insurance, enhancing cooperation among school administrations, and sharing staff with neighboring communities. We are starting to reap the benefits of many of these initiatives, as evidenced by an approximately \$2.2 million reduction in future cost increases expected over the three fiscal years ending in 2012 resulting from the new health insurance plan design agreed to by the Sudbury Public School Committee and its various collective bargaining units.

Why should we seriously consider an override?

Our costs are comparable to similar communities. We believe that the costs of running the schools and the town are in line with our peer communities and this is confirmed by a wealth of comparative data on the cost of our services compared to those peers. The Per Pupil cost of LS is roughly equal to the average of MetroWest regional high schools. Of the area school systems with separate regional high schools, and therefore separate data on the cost of K-8 education, the Sudbury Public Schools system has the lowest cost per student when compared to K-8 systems in Concord, Lincoln, Southborough, Northborough, and Carlisle. Furthermore, expenditures per capita for Town services including police, fire, and DPW are lower than many MetroWest communities including Bedford, Weston, Wayland, Wellesley, Carlisle, Lincoln, and Concord.

Labor is over 77% of the budget so reducing headcount is the primary means to balance a tight budget. Of the other 23% at the schools, only 5-7% is discretionary because the rest includes such things as special education, transportation, and utilities. This “discretionary” piece includes technology, classroom supplies, etc where the impact of the reduced spending of the last several years is starting to become very apparent. The annual growth in the operating budget was held to 1.6% in each of the last two years and is proposed to be only 2.75% this year, all well below the long-term trend in the cost of municipal employee compensation. The town and schools have managed and are managing to do this through a combination of significant layoffs, which have curtailed town services and increased school class sizes, and reductions in the growth of salaries and healthcare benefits. Over the last two years layoffs have amounted to:

Lincoln-Sudbury Regional High School:	13.5 FTE
Sudbury Public Schools:	22.1 FTE
Town Departments:	10.1 FTE

Our employees have made significant concessions and are sharing the burden of these tight budgets. Sudbury Public Schools believes their deficit in a Non-Override Budget is \$1.1 million, and they would have to lay off 12-15 FTEs and take other steps to balance such a budget.

Without concessions on the growth in salaries and the cost of healthcare benefits in the labor contract negotiated in 2009 for the three fiscal years ending in 2012, the budget deficit would have been \$2.4 million in FY11. Lincoln-Sudbury Regional High School also negotiated concessions in their new labor contract, but will still have to lay off 10 FTEs to balance a non-override budget gap of \$800,000. The contract with the Police Officers union was settled as this letter was completed; the firefighters' contract is still in negotiation.

We cannot continue to balance budgets by significant headcount reductions without impacting the quality of our schools and town. While even this year's proposed Override Budget will require a modest number of layoffs, we hope that for the sake of our community we can limit this third year of layoffs and cutbacks to just that, "modest".

We strongly urge you to be informed on the budgets being presented for your consideration. You have several avenues to increase your understanding of how each budget will affect the level of services, schooling and quality of life in Sudbury. Please review the Finance Committee Report section of the Town Warrant; attend budget forums; watch the Finance Committee budget hearings, which will be rebroadcast on Channels 8 (Comcast) and 31 (Verizon) during March; and review the vast array of budget materials available on the town and school websites. Do not hesitate to ask questions of your elected officials and committee members.

Whether or not you agree with our findings and recommendations, please make sure that when you cast your vote, it is an *informed* one.

Respectfully yours,
Sudbury Finance Committee

Charles Woodard, Chairman
Joan Carlton
Jamie Gossels
Robert Jacobson
William Kneeland, Jr.

James Rao
Martha Ragonis
Robert Stein
Sheila Stewart

FY11 MONIED ARTICLES
(Excluding Enterprises & Revolving Accounts)

<u>Article</u>	<u>Subject</u>	<u>Requested</u> ¹ <u>Amount</u>	<u>Finance Committee</u> <u>Recommendation</u>
2	FY10 Budget Adjustments	n/a	Report at Town Meeting
3	Stabilization Fund	\$ 50,000	Report at Town Meeting
4	FY11 Operating Budget	n/a	Recommends approval
5	FY11 Capital Budget	\$ 529,054	Recommends approval
10	Unpaid Bills	n/a	Report at Town Meeting
30	CPF: Tomb Door(s) Restoration	\$30,000	Report at Town Meeting
31	CPF: Revolutionary War Cemetery Radar Search	\$20,000	Report at Town Meeting
32	CPF: Update Existing Town Hall Vaults	\$67,795	Report at Town Meeting
33	CPF: Town Hall Architectural Design Study	\$50,000	Report at Town Meeting
34	CPF: Sudbury Housing Trust 10% Allocation	\$180,000	Report at Town Meeting
35	CPF: Town-wide Walkways	\$200,000	Report at Town Meeting
39	CPF: General Budget and Appropriations	n/a	Report at Town Meeting
Exhibit Notes:			
1. If article includes override, "Requested Amount" represents override value.			
n/a = exact dollar amount not available at time of Town Warrant printing			

ESTIMATED IMPACT ON FY11 TAX BILL

ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2011 TAX BILL											
		AVG.									
Fiscal 2010 Values		100,000	300,000	400,000	500,000	600,000	650,400	700,000	800,000	900,000	1,000,000
\$ Article or Override	Resident's Share	To calculate estimated dollar impact of any additional expenditures that may be considered by Town Meeting, use this chart below.									
		100,000	300,000	400,000	500,000	600,000	650,400	700,000	800,000	900,000	1,000,000
10,000	9,127	\$ 0.25	\$ 0.74	\$ 0.98	\$ 1.23	\$ 1.47	\$ 1.60	\$ 1.72	\$ 1.96	\$ 2.21	\$ 2.45
25,000	22,819	0.61	1.84	2.45	3.07	3.68	3.99	4.29	4.91	5.52	6.13
50,000	45,637	1.23	3.68	4.91	6.13	7.36	7.98	8.59	9.82	11.04	12.27
75,000	68,456	1.84	5.52	7.36	9.20	11.04	11.97	12.88	14.72	16.56	18.40
100,000	91,274	2.45	7.36	9.82	12.27	14.72	15.96	17.18	19.63	22.08	24.54
200,000	182,549	4.91	14.72	19.63	24.54	29.45	31.92	34.35	39.26	44.17	49.08
300,000	273,823	7.36	22.08	29.45	36.81	44.17	47.88	51.53	58.89	66.25	73.62
400,000	365,098	9.82	29.45	39.26	49.08	58.89	63.84	68.71	78.52	88.34	98.15
500,000	456,372	12.27	36.81	49.08	61.35	73.62	79.80	85.88	98.15	110.42	122.69
600,000	547,646	14.72	44.17	58.89	73.62	88.34	95.76	103.06	117.78	132.51	147.23
700,000	638,921	17.18	51.53	68.71	85.88	103.06	111.72	120.24	137.42	154.59	171.77
800,000	730,195	19.63	58.89	78.52	98.15	117.78	127.68	137.42	157.05	176.68	196.31
900,000	821,470	22.08	66.25	88.34	110.42	132.51	143.64	154.59	176.68	198.76	220.85
1,000,000	912,744	24.54	73.62	98.15	122.69	147.23	159.60	171.77	196.31	220.85	245.38
1,500,000	1,369,116	36.81	110.42	147.23	184.04	220.85	239.40	257.65	294.46	331.27	368.08
1,753,625	1,600,611	36.81	129.09	172.13	215.16	258.19	279.88	301.22	344.25	387.28	430.31
2,000,000	1,825,488	49.08	147.23	196.31	245.38	294.46	319.20	343.54	392.62	441.69	490.77
2,500,000	2,281,860	61.35	184.04	245.38	306.73	368.08	399.00	429.42	490.77	552.12	613.46
3,000,000	2,738,232	73.62	220.85	294.46	368.08	441.69	478.79	515.31	588.92	662.54	736.15
3,500,000	3,194,604	85.88	257.65	343.54	429.42	515.31	558.59	601.19	687.08	772.96	858.85
4,000,000	3,650,976	98.15	294.46	392.62	490.77	588.92	638.39	687.08	785.23	883.39	981.54

SUDBURY PUBLIC SCHOOLS SUPERINTENDENT'S REPORT

Dear Resident of Sudbury,

Despite budget growth of only 1.51% and the layoff of over 22 FTE in FY09 and 1.26% budget growth and a reduction of 4.5 FTE staff (not including the new full-day kindergarten program) in FY10, Sudbury Public Schools has continued to provide quality education to the students and community. Our students remain some of the highest performing students in the Commonwealth. Our staff continues to demonstrate a dedication to their students and profession that makes them highly regarded and highly effective.

For an example of this dedication, one only needs to review the negotiated contract reached in bargaining between the Sudbury Education Association and the School Committee in July 2009. Understanding the economic conditions we all face and wanting to be part of a solution to address the structural budget deficit that we face in Sudbury, the parties reached an agreement that called for significant concessions in wages and benefits. If one compares the costs of the new three-year agreement to what would have been the status quo using typical settlements, the new terms provide over \$4.1million in 'savings' over the three-year period of the contract. We are all proud of this outcome and the message it sends about being partners in working through these difficult economic times.

We are presenting two budgets in this warrant for consideration. First, the Non-Override Budget. This budget, \$34,414,578 including benefits, is 0.42% (approximately \$144,000) greater than our FY10 budget. This would be the third consecutive year of providing educational programming for our students on a budget that has been increased by less than 1.6% over the previous year.

The Non-Override Budget, even with the savings from the aforementioned bargaining concessions, requires \$909,000 be cut from our current program and staffing. The leadership of the district has been working hard to identify where such reductions will occur. At the time of printing this warrant, a final plan has not been adopted. The time required to adopt a budget balancing plan is greater this year than ever before because more obvious, "low-hanging fruit" is already gone. The choices before us are all bad. We are exploring ways to reduce costs in areas such as transportation, food service, and utilities, we are in discussions about potential savings from greater collaboration with our neighboring school districts, and we will likely reduce non-personnel costs by over \$280,000.

Nevertheless, we must still cut over \$600,000 in staff. Whatever the final plan for staff reductions, class size will increase and services to students, staff, and parents will be reduced. It is very possible some programs we have offered in the past will be eliminated. It is my opinion, that with this budget, our ability to meet the high expectations this community has for service will be affected.

Our enrollment is projected to decline in FY11 by 91 students (2.9%) and we are able to adjust our staffing accordingly (2.5%). This continues a recent trend of slightly declining enrollments in grades K through 8. We are able to adjust programming and staffing as a result, however, the relationship between enrollment and staffing level is not linear and does not provide full relief in a \$35M budget that is growing by only \$144,000.

Another key driver is special education. This federal and state mandated program requires us to provide a level of service that meets the needs of each individual student. While that mandate is

not optional, we continue to seek the most efficient means to do so. We have recently developed programs within our schools that allow us to serve the students in Sudbury in a much less costly way than sending them to out-of-district placements. We have also modified special educator staffing allocations to bring efficiencies to the program. The total number of students identified for special education services is down slightly from previous years but their needs are more severe and resource intensive.

Also presented is a budget that incorporates the portion of the \$1.75M override allocated to SPS. This provides a \$35,213,084 budget which is 2.75% greater (\$942,442) than FY10. This budget also requires an \$111,000 reduction from our current programming. We are able to balance the override budget with the reductions in staffing resulting from enrollment changes. In effect, a 2.75% budget growth allows us the opportunity to maintain our current class size guidelines, and programming and services for students, staff, and parents. It does not provide any flexibility in addressing mid-year state revenue cuts or unforeseen expenditures that might develop during the year.

The SPS School Committee and administration understand the economic conditions we all face and the importance of providing an education for our children that will allow them to compete and succeed in their future. We understand the pressure inherent in the relationship between costs and service. We continue to seek efficiencies of operation and additional funding from sources other than the local taxpayers. The challenges we face together all seem to present choices that are difficult and unacceptable. We accept our fiduciary responsibility to our students, parents, and community and will continue to offer leadership with fidelity and singleness of purpose.

Respectfully yours,

Dr. John A. Brackett

LINCOLN-SUDBURY SUPERINTENDENT'S REPORT

Dear Resident of Sudbury,

Lincoln-Sudbury is a great high school, and it is a high school that is feeling the strain of these challenging economic times. Over the past two years, we have had to cut 8.45 FTE of professional staff (teachers and an administrator), and we have cut 4.42 FTE of support staff (including teaching assistants and clerical help). As the economic downturn began two years ago, the school increased its Athletic, Activities, and Parking fees to levels that are significantly higher than neighboring communities. These fee increases have generated a total of \$230,000 more in revenue during FY'09, increasing total fee revenues for the District from \$307,757 under the previous fee structure to \$537,978 at the higher fee amounts. This has allowed the school to preserve a number of teaching positions that would have otherwise been eliminated if not for this added revenue – increasing these user fees unfortunately did shift the burden to families with children using these high school services.

The dilemma that Sudbury and many other communities face each year is that the costs of running and maintaining quality schools and providing Town services outpaces the revenues the Town can generate under Proposition 2½. Lincoln-Sudbury is being run with one of the leanest administrations around, after closing one of four House Offices last year and eliminating the

Housemaster and House Assistant positions. We have replaced much of our mailing costs by automating notices to parents using email. Our facility energy costs have decreased \$81,000 from a high of \$860,082 in actual FY'06 expenditures to a budgeted \$779,166 for FY'11. We negotiated copier replacements in FY'10 that will save the District close to \$30,000 in FY'11. In June 2009, the School Committee and Teachers Association settled a new three-year contract, which is estimated to have saved the taxpayers \$1.9 million over the next three years, compared to the conditions of the previous contract. In FY11, under the new contract, professional staff realize 1.75% COLA, but are also now paying 5% more towards their health insurance benefit. By settling such a favorable contract, the school is positioned to retain teachers, limit budget growth, and meet the goals of the Town in controlling costs. Despite such efficiency and savings, the high school needs an override vote just to maintain our current staff and programs under the constraints of Proposition 2½.

Almost all of our efforts this year have been to prepare a Non-Override Budget, which, in the end, represents a 0.42% increase in the operating budget, excluding debt service. Despite the contractual savings and cost cutting measures outlined above, a Non-Override Budget cuts at the very fabric of what makes Lincoln-Sudbury a great school – its teachers. A Non-Override Budget at Lincoln-Sudbury will result in the reduction of 6.55 FTE from the teaching and counseling staff and 1.00 FTE from the support staff. The loss of 6.55 professional staff during a time of growing enrollment will significantly increase class sizes and teacher loads (student-teacher ratio). This increase will result in less contact time between students and the adults guiding them towards success and preparation for their futures. Lincoln-Sudbury has always been a school that tries to meet students' needs and to provide an array of choice within our curriculum. Tightening budgets over the past couple of years have already limited our ability to schedule students into courses of their choice and courses matched to their needs. A No Override Budget will make these limitations even more pronounced, and the breadth of the high school curriculum will diminish. In a No Override Budget situation, a great school begins to look like any other high school.

Over the past years, our decisions have reflected a commitment to preserve, as much as possible, professional staff positions: those who serve our core mission of teaching and learning. With the highest user fees and the leanest administration around, increasing fee revenues or eliminating administrative overhead is not palatable, so the non-override impact upon professional positions this year is unavoidable. If the override should be successful, the additional resources would allow the high school to remain status quo with regard to staff. The 6.55 FTE professional and 1.00 FTE support staff positions would not be cut, nor would any additional positions be created.

Respectfully yours,

Scott Carpenter

TOWN MANAGER'S REPORT

Dear Resident of Sudbury,

As our national recession continues the negative impacts on our community's ability to fund essential Town services becomes ever more difficult. In our FY11 Non-Override Budget, the Selectmen and I present a Finance Committee recommended budget that increases 0.42%

(approximately \$75,000) over the FY10 budget. This Non-Override budget requires a number of reductions, some in staffing but mostly in the ability to provide services through outsourcing (contracts with vendors) and to have adequate quantities of materials and supplies that departments need to continue providing the same services and response times as in years past. These reductions are an extension of similar actions that were taken in FY09 and FY10. This follows two years of staffing cuts - we have left vacant and/or eliminated 7.05 FTE positions in FY09 and 5 FTE positions in FY10. In addition, we have cut the overtime budget in the police department, hours of operation at the Goodnow Library, equipment purchases in all departments, and nearly eliminated maintenance for town and school grounds. Spending to maintain town assets and our physical plant has decreased.

The FY11 Override budget recommended by the Finance Committee is a 2.75% increase over FY10, approximately \$496,000. This override budget would allow Town services to continue at about the same level as provided in FY10, except for the Sudbury Fire Department, where we are presenting a staffing increase plan that meets two key service level objectives – keeping station three open year-round while still reducing our reliance on overtime to obtain adequate staffing levels - without further introducing new demands on the tax levy. We are requesting that Town Meeting approve an Override budget that adds four more firefighter/EMS positions to the Department. By using ambulance fees and reducing the overtime budget, this will require net \$25,000 from the tax levy in the first year to add these four positions. Otherwise, nearly all the funds allowed under the Override budget prevent the reductions that are made in the Non-Override Budget and preserve service delivery at FY10 levels.

The Selectmen and I recognize that our challenge to run lean and to continue to keep expenditures for Town services, whether measured as a percent of total budget or on a per capita basis, lower than nearly all of our peer communities, is only half the battle. We also need to insure our costs are sustainable within the ability of Sudbury to generate sufficient revenues to pay for expected and required services.

While there are myriad efforts ongoing to achieve these goals, the Selectmen and I want to emphasize three overall strategies we are employing. First, we know our greatest costs (as well as greatest assets) are our town employees and the private vendors we outsource to. We have had no choice but to use a reduction in this area to keep spending within the allowed limits. In some cases this reduction has resulted from a careful study of impacts on services and a proposed alternative that allows the Town to continue to offer high quality services. The sharing of a Recreation Director with Wayland is one example of the careful approach that both saves money and protects service levels. Unfortunately, in other areas, the loss of employee hours or position or private vendor's hours has clearly had a negative service impact. The reduction in Library hours, purchased hours from public health nurses and police patrols are examples of the latter outcome. Through the C.O.R.E initiative (consolidation/cooperation, outsourcing, regionalization, and evaluation process engaged in by Town and SPS staff), and by engaging in lengthy discussions with our own staff, board and committee members, and the administrations of surrounding towns, we have identified a number of initiatives that we hope will lead to more cost avoidance/service protection scenarios. We also continue to evaluate situations where we can shift the cost of less critical services to a fee basis for user/recipients. An example of this is our field maintenance enterprise fund for recreational services. The direct cost of providing playing fields in the condition that is expected by our youth sport user groups has been shifted to an enterprise fund that is more funded by user fees and less through the town's general budget.

Secondly, we have been involved in very lengthy and challenging collective bargaining with our employee unions. Our employees are very aware of the economic environment, and they engaged

with us in negotiating benefit changes that have them pay more of the cost of their health insurance benefits, switching to “rate saver” plans with higher co-pays and deductibles, and agreeing that newly hired employees will pay an even a greater share of their health insurance costs. As of the writing of this letter, nearly all town unions have settled contracts with the Town that will allow the Town’s appropriation for health insurance for FY11 to be nearly level funded to the FY10 level. These contract terms are similar to those agreements reached by SPS with their union employees. We project that once bargaining has concluded for all Town employee groups, at least \$315,000 in health insurance costs will have been avoided in FY10 alone.

Finally, we continue to work on strategies to grow and diversify our tax base so that we are less vulnerable to economic cycles. The primary goal for several years has been to provide our commercial district with a wastewater treatment plant. With the identification of a potential parcel to serve as a leaching field for the wastewater plan, the Town is able to begin the many steps that must be addressed if this project is brought to reality, including questions of finances, governance, zoning and permitting. Diversifying our revenue base beyond property taxes has also been a continuing goal. The Board of Selectmen has placed two local option questions on the Town Meeting warrant that will ask citizens to consider tax increases – a .75% meals excise and a 2% hotel room excise – that will generate an estimated \$100,000 in local tax receipts that will remain in Sudbury. The availability of many State and Federal programs have prompted the Board of Selectmen to create the Green Ribbon Energy and Sustainability Committee to examine opportunities to invest in renewable energy sources which we hope will provide long-term sustainable revenue and cost-reduction opportunities for Sudbury.

As always, the Board of Selectmen and I, along with our great Town staff, will keep striving to provide the highest levels of service possible to the residents, businesses and guests of the Town. All of Sudbury’s residents depend on and benefit from the broad array of Town services that a community requires and their government delivers for their safety, health and quality of life needs, even more so when times are hard. In both the short and the long term, our focus will be on fiscally sustainable strategies that protect the capacity of Sudbury’s government to meet consistently these service responsibilities.

Respectfully yours,

Maureen G. Valente

SUMMARY OF FY09-FY11 BUDGET DATA

	FY09	FY10	FY11	FY11
EXPENDITURES	Actual	Budget	Non-Override	Override
LS Gross Assessment	16,471,854	16,886,852	16,891,910	17,357,765
LS Offsets/Re-apportionments	(3,255,278)	(3,031,946)	(2,426,206)	(2,426,206)
ARRA Stimulus Funds		(160,352)	-	-
LS Employee Benefits Assessment	3,117,966	3,142,491	3,185,857	3,185,857
LS E&D Fund Assessment	-	-		8,500
LSRHS NET (Operating Assessment)	16,334,542	16,837,045	17,651,561	18,125,916
SPS Gross Expenses	28,641,329	30,309,520	30,322,760	31,121,266
SPS Offsets	(2,302,767)	(2,255,533)	(2,358,310)	(2,358,310)
ARRA Stimulus Funds		(163,484)	-	-
SPS Employee Benefits	6,700,568	6,380,138	6,450,128	6,450,128
SPS NET	33,039,130	34,270,641	34,414,578	35,213,084
Minuteman Regional Assessment	237,788	299,768	228,794	228,794
Other Regional School Assessments	43,212	20,700	-	-
Total: Schools	49,654,672	51,428,154	52,294,933	53,567,794
General Government	2,160,424	2,285,787	2,314,144	2,413,114
Public Safety	6,330,016	6,566,348	6,755,544	6,817,317
Public Works	3,406,588	3,343,183	3,295,023	3,366,439
Human Services	515,673	533,679	538,050	569,362
Culture & Recreation	1,080,329	1,141,052	1,142,324	1,178,745
Unclassified & Transfer Accounts	70,643	378,619	302,885	382,162
Town Employee Benefits	4,153,667	4,159,598	4,224,185	4,323,070
subtotal, town services	17,717,340	18,408,266	18,572,156	19,050,209
Town Operating Offsets	(230,342)	(381,600)	(468,369)	(526,369)
Total: Town Departments	17,486,998	18,026,666	18,103,787	18,523,840
Capital Planning Committee	513,042	523,383	527,067	529,054
Capital Exclusions	-	-	-	-
Total: Capital Budget	513,042	523,383	527,067	529,054
Subtotal: Operating Budget	67,654,712	69,978,203	70,925,787	72,620,688
Town Debt Service	4,347,060	4,261,604	4,180,354	4,180,354
LSRHS (Debt Assessment)	2,394,071	2,298,949	2,237,147	2,237,147
Total: Debt Budget	6,741,131	6,560,553	6,417,501	6,417,501
Enterprise Fund Expenditures	702,292	945,088	982,802	949,074
Stabilization Fund	-	-	-	50,000
Total: Other	702,292	945,088	982,802	999,074
Other Charges to be raised	983,524	781,857	744,548	744,548
Total: To Be Raised	76,081,659	78,265,701	79,070,637	80,781,811
RECEIPTS				
State Aid (Cherry Sheet)	5,650,528	5,680,026	5,254,024	5,254,024
SBAB School Debt Reimbursement	1,702,597	1,702,597	1,702,597	1,702,597
Local Receipts	4,287,194	4,058,288	3,652,860	3,652,860
Free Cash	294,110	-	-	-
Retirement Trust Fund	25,000	-	-	-
Abatement Surplus	421,000	321,000	-	-
Prior Year Articles/Recoveries	26,320	-	-	-
Enterprise Funds	774,359	974,638	1,012,397	1,012,397
Total: State & Local Receipts	13,181,108	12,736,549	11,621,878	11,621,878
Tax Levy	63,263,124	65,529,152	67,448,759	69,202,384
Total: Revenue	76,444,232	78,265,701	79,070,637	80,824,262
UNDER/ (OVER)	362,573	(0)	(0)	42,451

RECOMMENDED FY11 BUDGETS

ALL LINE ITEMS - ALL FUNDS*	FY10	FY11	FY11	FY11	FY11
	Budget	Non-Override	% of Budget	Override	% of Budget
Lincoln-Sudbury Regional High School	16,837,045	17,651,561	22.3%	18,125,916	21.5%
Sudbury Public Schools	34,270,641	34,414,578	43.5%	35,213,084	43.8%
Minuteman and other Voc Schools	320,468	228,794	0.3%	228,794	0.4%
Town Departments	18,026,666	18,103,787	22.9%	18,523,840	23.0%
Debt Service - Town, SPS and LSRHS	6,560,553	6,417,501	8.1%	6,417,501	8.4%
Transfer Station Enterprise Fund	302,087	271,437	0.3%	271,437	0.4%
Atkinson Pool Enterprise Fund	482,656	489,868	0.6%	489,868	0.6%
Field Maintenance Enterprise Fund	160,345	221,497	0.3%	187,769	0.2%
Capital Items	523,383	527,067	0.7%	529,054	0.7%
Stabilization Fund	-	-	0.0%	50,000	0.0%
State and Local Charges	781,857	744,548	0.9%	744,548	1.0%
Total Budget*	78,265,701	79,070,637	100.0%	80,781,811	100.0%

* Total budget reporting includes all cost centers and all funds to be appropriated or expended, except for revolving funds.

OPERATING BUDGET*	FY10	FY11	FY11	FY11	FY11
	Budget	Non-Override	% of Total	Override	% of Total
Lincoln-Sudbury Regional High School	16,837,045	17,651,561	24.9%	18,125,916	25.0%
Sudbury Public Schools	34,270,641	34,414,578	48.5%	35,213,084	48.5%
Minuteman and other Voc Schools	320,468	228,794	0.3%	228,794	0.3%
Town Departments	18,026,666	18,103,787	25.5%	18,523,840	25.5%
Capital Items	523,383	527,067	0.7%	529,054	0.7%
Total Operating Budget*	69,978,203	70,925,787	100.0%	72,620,688	100.0%

*Operating cost centers only. Excludes debt service, capital projects and other one-time charges. Enterprise funds are also omitted from this table. The cost centers shown above are the ones that are primarily supported by the General Fund.

SUDBURY PUBLIC SCHOOLS BUDGET SUMMARY

	FY09	FY10	FY11	FY11
	Actual	Budget	No Override	Override
Salaries & Other Cash Compensation				
Administration	885,574	843,525	837,082	837,082
Elementary Instruction	8,779,376	9,070,398	9,570,418	9,526,068
Middle School Instruction	4,884,122	5,085,833	5,125,979	5,059,450
Curriculum/Instr/Technology	548,011	564,879	531,842	531,842
Special Ed Instruction	4,787,816	4,894,654	4,986,372	4,986,372
Health, Transportation & Food Service	774,409	748,050	699,942	699,942
Plant Maintenance	777,882	825,382	842,907	842,907
All Other	487,972	614,263	614,263	614,263
Non-Override Reduction			(627,154)	
Total Salaries & Other Cash Compensation	21,925,162	22,646,984	22,581,651	23,097,926
Expenses				
Administration	474,554	409,911	422,208	422,208
Elementary Instruction	322,849	348,703	359,164	359,164
Middle School Instruction	181,894	168,690	173,751	173,751
Curriculum/Instr/Technology	219,847	370,214	381,320	381,320
Special Ed Instruction	3,331,820	3,621,176	3,983,294	3,983,294
Health, Transportation & Food Service	718,946	1,060,289	1,092,098	1,092,098
Utilities	945,413	1,218,926	1,255,494	1,255,494
Plant Maintenance	513,886	464,626	478,565	478,564
Non-Override Reduction			(282,232)	
Total Expenses	6,709,209	7,662,535	7,863,662	8,145,893
Subtotal before Benefits	28,634,371	30,309,519	30,445,313	31,243,819
Healthcare Benefits				
Active Employees	4,604,065	4,210,479	4,234,745	4,234,745
Retired Employees	513,387	513,387	513,387	513,387
Total Healthcare Benefits	5,117,452	4,723,866	4,748,132	4,748,132
Retirement & Other Benefits				
Active Employees	1,242,614	1,308,813	1,354,536	1,354,536
Retired Employees	347,460	347,460	347,460	347,460
Total Retirement & Other Benefits	1,590,074	1,656,273	1,701,996	1,701,996
Total Benefits	6,707,526	6,380,139	6,450,128	6,450,128
Total SPS Operating Expenses	35,341,897	36,689,658	36,895,441	37,693,947
SPS Grants, Fees & Other Offsets	(2,302,767)	(2,419,017)	(2,480,863)	(2,480,863)
Net SPS Operating Expenses	33,039,130	34,270,641	34,414,578	35,213,084
Total Compensation (salaries, other cash compensation & benefits) as a percentage of Operating Expenses (before Offsets)	81.02%	79.12%	78.69%	78.39%
Students:				
Sudbury (Pre-K - 8)	3,151	3072	3020	3020
Metco	62	65	65	65
Other Out of District Students at SPS	27	28	28	28
Total	3,240	3,165	3113	3113
Cost per Student	10,908	11,592	11,852	12,109
(Operating Expenses <u>before</u> Offsets divided by number of Students Note that this number is not the same as the Per Pupil Expenditure number used by the MA Department of Education)				

	FY09	FY10	FY11	FY11
	Actual	Budget	No Override	Override
Headcount (FTEs)				
Administrators	16.00	16.00	16.00	16.00
Administrative Support	18.60	18.40	18.40	18.40
Teachers (excl SPED)	191.28	193.83	194.83	192.33
Classroom & Teaching Support (excl SPED)	14.95	21.37	21.37	21.37
SPED Teachers	48.40	52.90	52.90	52.90
SPED Support	54.10	46.90	46.90	46.90
Metco	2.71	3.60	3.60	3.60
Custodial/Grounds/Maintenance	16.00	16.00	16.00	16.00
All Other	27.85	24.31	24.31	24.31
Non-Override Reduction			(12.50)	
Total FTEs	389.89	393.31	381.81	391.81
Part Time Employees receiving benefits	40	35	35	35
Retirees receiving Full Healthcare benefits	50	47	47	47
Retirees receiving Medicare Supplemental benefits	127	141	141	141
Average Class Size				
Haynes	18.8	19.3	21.3	19.1
Loring	21.6	20.9	21.0	20.2
Nixon	22.4	21.1	21.2	21.1
Noyes	19.9	20.9	22.0	20.4
Curtis	23.8	23.2	25.7	24.5
Average Salaries				
Teachers	64,013	64,771	67,017	67,017
Administration	100,836	104,241	104,470	104,470
All Other	34,794	31,792	33,747	33,747
Healthcare benefits per active employee	11,809	10,705	11,091	10,808
Healthcare benefits per retiree	2,529	2,529	2,529	2,529
Retirement & Other Benefits per active employee	3,187	3,328	3,548	3,457
Retirement & Other Benefits per retiree	5,791	5,791	5,791	5,791

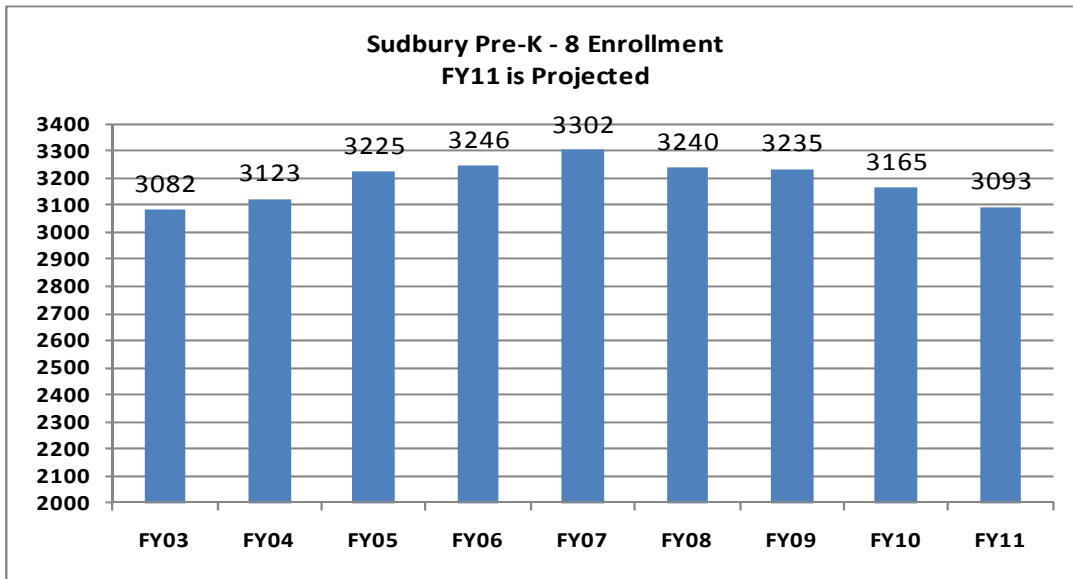
Exhibit Notes:

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

2) In FY10 Sudbury Public Schools' contributions for health care are 85% HMO, 70% PPO, & 50% Retirees. In FY11 Sudbury Public Schools' contributions for health care are 82.5% HMO, 67.5% PPO, & 50% Retirees. In FY12 Sudbury Public Schools' contributions for healthcare are 80% HMO, 65% PPO, & 50% Retirees. As of 7/1/09, Sudbury Public Schools' contributions for new hires are 70% HMO & 55% PPO.

Since 7/1/1996, all new non-teacher employees pay 9% plus 2% of salary above \$30,000 in contributions for Middlesex County Retirement. Over the course of an employee's career, a Group 1 (non-public safety) employee hired after this date will pay nearly the entire cost of his/her future retirement benefits. Since 7/1/2001, all new teacher employees pay 11% in contributions to the Massachusetts Teacher Retirement System. Sudbury Public Schools does not contribute to the Massachusetts Teacher Retirement System for active employees and most retired employees. Sudbury Public Schools is in the second to last year of a 20-year repayment plan for an early retirement incentive offered by the Massachusetts Teacher Retirement System 20 years ago. Our yearly repayment for this year and next is \$14,000 each year.

3) Average salaries include other cash payments other than overtime.



	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
SUDBURY PUBLIC SCHOOLS				
Sudbury Public Schools	28,641,329	0,309,520	30,322,760	31,121,266
Offsets (incl. METCO)	(2,302,767)	(2,255,533)	(2,358,310)	(2,358,310)
ARRA Stimulus Funds		(163,484)	-	-
Sudbury Public Schools	26,338,562	27,890,503	27,964,450	8,762,956
Add: Benefits Costs	6,700,568	6,380,138	6,450,128	6,450,128
Add: Muni/Schools Fac. Dept.	-	-	-	-
Total: Sudbury Public Schools	33,039,130	34,270,641	34,414,578	5,213,084

The FY11 Non-Override Budget will provide Sudbury Public Schools with an additional \$143,937 in operating revenue over FY10 amounts. This represents a 0.4% increase over the SPS Fiscal Year 2010 budget, inclusive of pension and insurance costs. The Finance Committee believes that this budget is insufficient to support SPS for FY11 and will result in substantive loss of personnel and services. Although the student population is projected to decrease in FY11, increases in other costs would require personnel reductions under a Non-Override Budget that would have a detrimental impact on the Sudbury Public Schools and would result in either increases in class sizes, reductions in essential services, or both.

Collective bargaining negotiations with the school unions concluded in the summer of 2009 and resulted in a three-year agreement (for FY10, 11 and 12) with a substantial reduction in the rate of growth in overall compensation (salaries and benefits) compared with the prior contract. In a "roll-up budget", which represents the same staffing levels as FY10, there would be a net increase in salary expenses of \$269,488 or 1.24% and an increase in benefits of \$69,990 or 1.1%, resulting in a total net increase in compensation of 1.21% from FY10 to FY11. Excluding Special

Education costs, all other non-personnel related operating expenses are projected to increase by approximately 3.0% from FY10 to FY11.

By contrast, Special Education costs are projected to increase by 10%, or \$362,118, in FY11. The increases in Special Education costs are being driven by State and Federal mandated levels of service as well as increased student needs. Moreover, the impact of increases in Special Education costs is further compounded by reductions to Special Education Circuit Breaker funding from the State. Circuit Breaker funding is budgeted to decrease by \$250,000, or 38%, in FY11. The combined unfavorable impact of reduced Circuit Breaker funding and higher Special Education costs is an increase of \$612,118, or 21%, from FY10 to FY11.

Non-Override Budget

The Finance Committee recommends approval of a FY11 Non-Override Budget for the Sudbury Public Schools in the amount of \$34,414,578.

Override Budget

The Finance Committee recommends approval of a FY11 Override Budget for the Sudbury Public Schools for FY11 in the amount of \$35,213,084, or \$798,506 more than the Non-Override Budget. This is an increase of \$942,443, or 2.75% over the SPS Fiscal Year 2010 budget, inclusive of pension and insurance costs. At this level of funding, reductions of over \$111,000 will still be required from the current program and services. The Finance Committee believes that it is particularly important that SPS operate with closer to a level-service budget in FY11 given the significant reductions to staff and services the school system made in FY09, and the concessions agreed to by school unions in the collective bargaining agreement that came into effect in FY10.

LINCOLN-SUDBURY REGIONAL HIGH SCHOOL BUDGET SUMMARY

	FY09	FY10	FY11	FY11
	Actual	Budget	No Override	Override
Salaries & Other Cash Compensation				
Administration	1,143,907	1,022,083	1,032,806	1,032,806
Instruction (excl Spec Ed)	10,165,643	10,048,455	10,145,868	10,481,177
Special Ed Instruction	1,439,609	1,538,580	1,540,146	1,600,562
Educational Support	560,617	592,394	610,886	610,886
Educational Support - Special Education	464,690	436,236	442,928	442,928
Clerical/Admin Support	895,759	909,158	913,203	937,203
Grounds/Maintenance	572,846	609,190	624,508	624,508
Coaching	392,510	380,223	381,586	381,586
All Other (Substitutes, Extra Services, Curric Dev)	140,105	209,416	209,544	209,544
Total Salaries & Other Cash Compensation	15,775,686	15,745,735	15,901,475	16,321,199
Expenses				
Instruction (excl Spec Ed)	566,966	524,114	461,241	482,626
Special Education	2,790,025	3,183,263	3,435,949	3,438,201
Educational Support	977,245	911,913	908,976	957,536
Operations excl Utilities	645,659	630,736	627,238	629,238
Utilities	784,161	858,435	779,166	779,166
All Other Expenses & Contingency	178,980	375,262	207,288	207,288
Total Expenses	5,943,036	6,483,723	6,419,858	6,494,055
Subtotal before Benefits	21,718,722	22,229,458	22,321,333	22,815,254
Healthcare Benefits				
Active Employees	1,760,489	1,764,772	1,892,838	1,957,860
Retired Employees	935,587	856,493	981,945	981,945
Total Healthcare Benefits	2,696,076	2,621,265	2,874,783	2,939,805
Retirement & Other Benefits				
Active Employees	383,491	423,897	500,537	418,890
Retired Employees	359,210	379,075	396,133	396,133
Total Retirement & Other Benefits	742,701	802,972	896,670	815,023
Total Benefits	3,438,777	3,424,237	3,771,453	3,754,828
Total LSRHS Operating Expenses, including grant funding	25,157,499	25,653,695	26,092,786	26,570,082
LSRHS Grants, Fees & Other Offsets, incl circuit breaker	2,247,715	1,953,135	2,292,684	2,217,757
Net LSRHS Operating Expenses	22,909,784	23,700,560	23,800,102	24,352,325
Total Compensation (salaries, other cash compensation & benefits) as a percentage of Operating Expenses (before Offsets)				
	76.4%	74.7%	75.4%	75.6%
Students:				
Sudbury	1,293	1,275	NA	NA
Lincoln	237	233	NA	NA
Metco	91	91	91	91
Other Out of District Students at LS	18	15	12	12
Total	1,639	1,614	1,645	1,645
"Other" is based on current students in grades 9-11 who would continue				
Cost per Student	15,349	15,894	15,862	16,152
(Operating Expenses before Offsets divided by number of Students. Note that this number is not the same as the Per Pupil Expenditure number used by the MA Department of Education)				

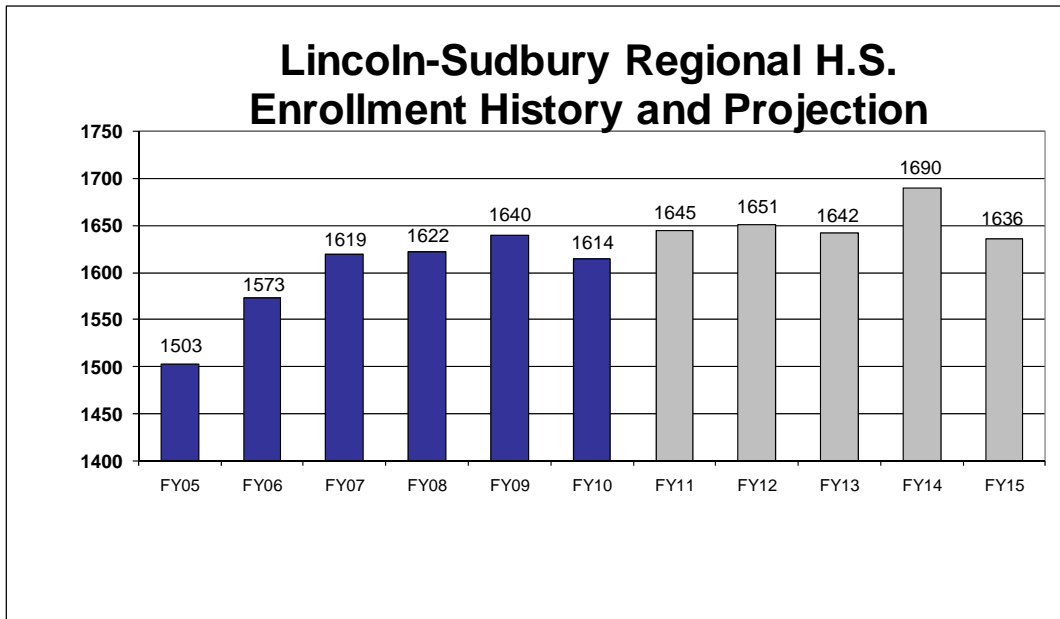
	FY09	FY10	FY11	FY11
	Actual	Budget	No Override	Override
Headcount (FTEs)				
Administrators	9.20	8.20	8.00	8.00
Administrative Support	17.87	17.18	16.18	17.18
Teachers (excl SPED)	129.03	123.89	118.34	123.89
Classroom & Teaching Support (excl SPED)	5.10	4.80	4.80	4.80
SPED Teachers	18.30	19.25	18.25	19.25
SPED Support	17.50	15.95	15.95	15.95
Metco	3.75	3.00	3.00	3.00
Custodial/Grounds/Maintenance	11.50	11.00	11.00	11.00
All Other	8.10	8.60	8.60	8.60
Total FTEs, including non-operating grant funded positions	220.35	211.87	204.12	211.67
	<i>Assumes grants funded at same level</i>			
Part Time Employees receiving benefits (as of Jan. 2010)	30	24	24	24
Retirees receiving Full Healthcare benefits	79	39	39	39
Retirees receiving Medicare Supplemental benefits	30	90	90	90
Average Class Size				
Academic (English, History, Math, Science, Languages)	22.8	23.1	25.0	23.6
Students Participating in Athletics	1,181	1,146	1,146	1,146
	<i>Reduction based on program elimination and estimated for inclusion of spring sports</i>			
Average Salaries				
Teachers	78,770	80,949	85,555	84,405
Administration	124,338	124,644	129,101	129,101
All Other	44,931	47,963	49,540	49,118
Healthcare benefits per active employee	7,989	8,330	9,273	9,250
Healthcare benefits per retiree	8,583	6,639	7,612	7,612
Retirement & Other Benefits per active employee	1,740	2,001	2,452	1,979
Retirement & Other Benefits per retiree	2,333	2,462	2,572	2,572
Reconciliation to Budget Summary				
LS Gross Assessment (Subtotal before Benefits above)	21,718,722	22,229,458	22,321,333	22,815,254
LS Employee Benefits (from above)	3,438,777	3,424,237	3,771,453	3,754,828
Offsets & Reapportionment:				
Grants & Offsets (above, incl circuit breaker)	2,247,715	1,953,135	2,292,684	2,217,757
State Aid to LSRHS (does not incl circuit breaker; incl ARRA)	2,857,040	2,853,629	2,498,616	2,498,616
Lincoln Share of the LSRHS Budget	2,936,342	3,094,464	3,274,353	3,360,721
Estimated Receipts	61,000	61,000	50,000	50,000
Reapportionment	909,555	854,422	325,572	325,572
Appropriation to E&D		0	0	(8,500)
Total Offsets & Reapportionment	9,011,652	8,816,650	8,441,225	8,444,166
LSRHS Net Operating Assessment	16,145,847	16,837,045	17,651,561	18,125,916
	(Will not reconcile because of inclusion of grants and use of actuals versus budget)			

Exhibit Notes:

1) Payments for benefits are those made by LSRHS and do not include employee or retiree contributions. Retirement assessment from the Middlesex Retirement System pertains to staff other than teachers and administrators.

2) LSRHS contributes 70% to active employee health insurance premiums and 75% to most retiree premiums. Adoption of Section 18 and reduction of 5% L-S contribution took effect in FY10.

3) Average salaries include other cash payments other than overtime.



	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
LINCOLN-SUDBURY REGIONAL HS				
Sudbury Apportionment	84.81%	84.51%	84.36%	84.36%
LSRHS Benefits Assessment	3,117,966	3,142,491	3,185,857	3,185,857
LSRHS Oper. Assessment	16,471,854	16,886,852	16,891,910	17,357,765
LSRHS Oper. Offsets	(3,255,278)	(3,031,946)	(2,426,206)	(2,426,206)
ARRA Stimulus Funds	-	(160,352)	-	-
LS E&D Assessment	-	-	-	8,500
	16,334,542	16,837,045	17,651,561	18,125,916
LSRHS Debt Assessment	2,394,071	2,298,949	2,237,147	2,237,147
Total LSRHS (Sudbury Portion)	18,728,612	1,135,994	29,888,708	0,363,063

Lincoln-Sudbury Regional High School (“LSRHS”) is a grade 9-12 regional school district established pursuant to chapter 71 of the Massachusetts General Laws and operates in accordance with Lincoln-Sudbury Regional Agreement. As a regional school district, Lincoln-Sudbury must include within its budget all costs associated with running the District, including health, life, workers’ compensation and property and casualty insurances; FICA; retirement assessments; and debt service. These expenses, which typically fall outside the budgetary responsibility of non-regional schools, represent 23.9% of the districts total FY11 budget under the finance committee’s recommended \$1,753,625 Override Budget. Chapter 70 State Aid and Regional Transportation Aid are used to reduce the total budget, along with other district receipts and re-apportioned funds. The amount remaining after deducting receipts is then apportioned to Lincoln and Sudbury by a ratio based upon a three-year average enrollment of students from each

town. The FY11 budget ratio for Sudbury is 84.36% (down .15% from FY10) and for Lincoln is 15.64%.

Enrollment at LSRHS has increased 82.00% from FY95 (887 students) to FY10 (1,614 students). Projections indicate a 2% increase in FY11 (1,645 students, or a total increase of 31 students) and only minor enrollment fluctuation until 2014 when an increase of 45-47 students is projected based on current elementary enrollments.

Under both the Non-Override and Override Budget, state aid for Chapter 70 and regional transportation costs are projected to be reduced from FY10. Both budgets reflect a projected \$2,498,616 in state aid, not including the \$667,023 in Circuit Breaker funds budgeted for the support of special education.

Non-Override Budget

The Finance Committee recommends approval of a FY11 Non-Override net operating budget assessment of \$17,651,561 from Sudbury to the district. This budget would provide the District with a 0.42% increase in the total gross operating budget over FY10 levels. The Finance Committee believes that this funding level would be insufficient to fund even purely inflationary or cost of living expense increases and would force the district to make very significant staff reductions, including teaching staff.

Override Budget

The Finance Committee recommends approval of a FY11 Override Budget operating assessment of \$18,125,916 from Sudbury to the District. This budget would provide the District with a 2.75% increase in the total gross operating budget over FY10 levels. At this funding level, the Finance Committee believes the District would be able to avoid the most severe staff and other reductions imposed by the Non-Override Budget but would still have to make reductions in classroom support (textbooks, supplies, equipment, etc.). This budget also provides for an assessment to Sudbury of a modest \$8,500 for the Excess & Deficiency fund (the equivalent of the Town’s Stabilization Fund) to be used to meet unanticipated budget emergencies.

MINUTEMAN VOCATIONAL TECHNICAL SCHOOL DISTRICT

	Actual	Budget	Non-Override	Override
MINUTEMAN VOCATIONAL				
Operating Assessment	237,788	299,768	228,794	228,794
Total: Minuteman Vocational	237,788	299,768	228,794	228,794

The proposed FY11 operating budget for Minuteman Regional Career and Technical High School shows a decrease in the assessment to Sudbury of \$70,974 or 23.7% under the FY10 assessment. The overall FY11 operating budget for Minuteman decreased by \$1,257,322 or 7.2% under the FY10 budget. After adjusting for all offsets, the decrease in the assessment to all towns in the regional district was \$1,107,799 or 10.6%. The decrease in the assessment to Sudbury was higher due to changes in the enrollment mix of Sudbury students at Minuteman.

The Finance Committee recommends approval of FY11 assessment to the District of \$228,794.

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
OTHER EDUCATIONAL ASSESSMENTS				
Operating Assessment	43,212	20,700	0	0
Total: Minuteman Vocational	43,212	20,700	0	0

The proposed FY11 operating budget for other educational assessments is zero. The Town does not anticipate having students attend any other high school districts in FY11.

TOWN SERVICES BUDGET SUMMARY

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
General Government	2,160,424	2,285,787	2,314,144	2,413,114
Public Safety	6,330,016	6,566,348	6,755,544	6,817,317
Public Works	3,406,588	3,343,183	3,295,023	3,366,439
Human Services	515,673	533,679	538,050	569,362
Culture & Recreation	1,080,329	1,141,052	1,142,324	1,178,745
Town-Wide Operations & Transfers	70,643	378,619	302,885	382,162
Town Share Muni./Schools Facilities Dept.	-	-	-	-
Subtotal before Benefits	13,563,673	14,248,668	14,347,971	14,727,139
Town Employee Benefits	4,153,667	4,159,598	4,224,185	4,323,070
Total Town Operating Expenses	17,717,340	18,408,266	18,572,156	19,050,209
Town Offsets	(230,342)	(381,600)	(468,369)	(526,369)
Net Town Operating Expenses	17,486,998	18,026,666	18,103,787	18,523,840
Town Salaries & Other Cash Compensation	9,725,213	10,316,669	10,415,536	10,484,021
Healthcare Benefits				
Active Employees	2,168,466	2,085,665	1,996,373	1,996,373
Retired Employees	237,726	225,081	232,668	232,668
Total Healthcare Benefits	2,406,192	2,310,746	2,229,041	2,229,041
Retirement Benefits				
Active Employees	944,231	1,016,588	1,112,152	1,112,152
Retired Employees	550,145	550,145	567,518	567,518
Total Retirement Benefits	1,494,376	1,566,733	1,679,670	1,679,670
Other Benefits & Insurances	253,099	282,119	315,474	414,359
Total Employee Benefits & Insurances	4,153,667	4,159,598	4,224,185	4,323,070
Town Expenses	3,102,840	3,423,044	3,423,480	3,697,191
Town Capital	94,300	94,300	94,300	122,000
Town Snow & Ice	641,320	414,655	414,655	423,927
Town Offsets	(230,342)	(381,600)	(468,369)	(526,369)
Net Town Operating Expenses	17,486,998	18,026,666	18,103,787	18,523,840
Town Only Employee Headcount (FTE)	169.06	162.16	161.07	166.36

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
Total Compensation (salaries, other cash payments & benefits) as a percentage of Operating Expenses (before Offsets)	78.3%	78.6%	78.8%	77.7%
Average Salaries:				
Senior Managers	109,654	116,275	118,903	118,903
Department Heads	76,047	82,635	85,081	85,081
All Other Employees	46,541	51,683	52,845	52,575
Part time employees w/ health benefits	16	14	15	15
Active F/T employees w/ health benefits	139	142	140	140
Retirees w/ health benefits	94	89	92	92
Healthcare benefits cost per active employee*	13,990	13,370	12,880	12,880
Healthcare benefits cost per retiree *	2,529	2,529	2,529	2,529
Pension cost per active employee*	5,427	5,842	6,429	6,429
Pension cost per retiree *	5,791	5,791	5,791	5,791

* Benefits breakdown active vs. retired is estimate only. Retiree per average cost based on recent average. Counts as of 10/1 each year. Cost per employee represents Town's estimated annual contribution.

Exhibit Notes:

- 1) Payments for benefits are those made by the Town and do not include employee or retiree contributions.
- 2) In FY10, the Town contributes for healthcare 85% HMO, 70% PPO, 50% for retirees. FY11, 82.5% HMO, 67.7% PPO, 50% for retirees. Effective 7/1/2009 for all new employees, the Town contributes 70% HMO, 55% PPO.
- 3) Since 7/1/1996, all new employees pay 9% plus 2% of salary above \$30,000 in contributions to retirement. Over the course of an employee's career, a Group 1 (non-public safety) employee hired after this date will pay nearly all the entire cost of their future retirement benefits. It is estimated that the Town pays between 3-4% for Group 4 (public safety) employee retirement benefits because they may retire 10 years sooner than Group 1, with full benefits. In general, the majority of Town paid retirement costs is to cover unfunded pension liability for employees hired prior to 1996.
- 4) Average salaries include other cash payments other than overtime.

GENERAL GOVERNMENT

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
GENERAL GOVERNMENT				
Selectmen/Town Manager	287,644	306,209	309,826	310,964
ATM/Personnel	105,295	128,921	128,862	130,612
Law	175,353	167,146	159,793	169,793
Finance Committee	1,313	2,040	2,003	7,003
Accounting	278,393	293,757	311,602	311,602
Assessors	258,185	277,458	278,677	282,178
Treasurer/Collector	270,963	281,349	284,435	295,535
Information Systems	302,080	312,800	312,451	371,041
Town Clerk & Registrars	219,973	238,508	239,473	245,726
Conservation	105,180	108,702	109,912	111,550
Planning & Board of Appeals	156,045	168,898	177,109	177,109
Total General Government	2,160,424	2,285,787	2,314,144	2,413,114
Employee Compensation	1,732,588	1,865,170	1,918,502	1,923,502
All Other Expenses	427,836	420,617	395,642	489,612
Total General Government	2,160,424	2,285,787	2,314,144	2,413,114
General Government Headcount (FTE)	31.80	30.50	30.50	30.50

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

Non-Override Budget

The FY11 Non-Override Budget is increasing by \$28,357, compared to the FY10 budget. It is important to note that the FY10 budget shown differs from the appropriation figures contained in last year's warrant, due to the Town's negotiating health insurance concessions with its employees. Town employees agreed to switch to rate savers plans and increase their premium contribution 5%, and in return, the salary schedule for FY10 was increased by an average 3% over FY09 salary schedules. Further, for FY11 the employees agreed to accept a 0% cost of living increase and contribute 2.5% more to their insurance premiums in exchange for adding a new step onto the top of most salary schedules. Thus, any changes in personnel costs in the General Government area are due to step movement in FY11. To offset these salary increases, most departments have reduced budgets for non-personnel costs. A number of reductions have been made to keep overall budget growth at this limited amount of growth. Among these cuts are funds for replacement of computer equipment, services provided through contracts, training options for Town staff, which require education and certification for many mandated functions, and funds for legal expenses including labor counsel. The General Government departments have small staffs yet are responsible for essential and mandated functions; any cuts are felt deeply throughout.

The Finance Committee recommends approval of a FY11 Non-Override General Government Budget of \$2,314,144.

Override Budget

The FY11 Override Budget is increasing by \$127,327, compared to the FY10 budget. Nearly half those funds will be used by the Information Systems Department, to maintain the Town’s information systems capabilities, which have been reduced through past three years of budget cuts and to specifically allow the Town to maintain and further develop the GIS (Geographic Information System) software and data, relied on by all Town departments. Funds are also restored across the board to keep the department at FY10 service delivery levels.

The Finance Committee recommends approval of a FY11 Override General Government Budget of \$2,413,114.

PUBLIC SAFETY

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
PUBLIC SAFETY				
Police	2,626,498	2,682,913	2,744,856	2,792,028
Fire	2,823,482	2,938,304	3,065,135	3,064,532
Building Department	880,036	945,132	945,553	960,756
Total Public Safety	6,330,016	6,566,348	6,755,544	6,817,317
Employee Compensation	5,214,211	5,386,350	5,527,394	5,522,216
All Other Expenses	1,021,505	1,085,698	1,133,850	1,173,101
Capital	94,300	94,300	94,300	122,000
Total Public Safety	6,330,016	6,566,348	6,755,544	6,817,317
Public Safety Headcount (FTE)	79.25	76.97	76.97	80.97

The Public Safety cluster consists of the Police and Fire Departments and the Building Inspector. It is by far the largest of the Town’s budget clusters, comprising 36% of the overall Town operating budget (exclusive of schools, benefits, and debt).

Non-Override Budget

The FY11 Non-Override Budget for this cluster is increasing by \$189,196 or 2.88% over the FY10 adjusted budgets. As with the General Government cluster, an adjusted FY10 budget is shown which differs from the appropriated budget for FY10, due to settlement of labor contracts. Negotiations with the firefighters and dispatchers unions are in progress as of the writing of this report. However, all other employees in the public safety cluster, including the Police Officers union, agreed to switch to rate savers plans and increase their premium contribution 5%, and in return the salary schedule for FY10 was increased by an average 3% over FY09 salary schedules. Further, for FY11 the employees agreed to accept a 0% cost of living increase and contribute 2.5% more to their insurance premiums in exchange for adding a new step onto the top of most salary schedules. Thus, any changes in personnel costs in the area are due to step movement in FY11. While collective bargaining with the firefighters and dispatchers is still underway, the budget request for FY11 has been developed assuming a settlement that is similar to that reached with other employees.

Within the Police Department, except for providing for the step increases in salaries, all other expenses are held to FY10 levels, but due to inflation in costs of contracts and materials, this results in a decline in service level capacity. On a gross basis, the Police Department budget rises 2.31%, but a State grant to help offset the cost of E-911 dispatch costs reduces the net increase to 1.38% over FY10. The budget for the Fire Department rises by \$126,832, most of which is for projected salary costs, but two other expense items are increasing. Payments to a vendor for billing for ambulance response are going up, as they are paid as a percentage of total collections and it is projected that ambulance receipts will increase as well to offset this cost. The gasoline budget was increased due to usage pattern over the past year. The Building Department budget will increase by \$421 or .04% over FY10.

The Finance Committee recommends approval of a FY11 Non-Override Public Safety Budget of \$6,755,544 (Gross basis) less direct police grant offset of \$25,000 for a net appropriation total of \$6,730,544.

Override Budget

The FY11 Override Budget is increasing \$61,772 over the Non-Override Budget, primarily for two reasons: a new vehicle for the Police Department, and staffing changes planned for the Fire Department, which will have an impact on the benefits budget found elsewhere in this document.

The Override Budget for the Fire Department contains funding to hire four additional firefighters, bringing the number of firefighters per shift to 9 from the current 8, for a total of 36 firefighters assigned to four shifts. The additional salary cost to hire these new employees is estimated at \$188,584, assuming a July 1, 2010 date of hire, along with \$98,885 added to the benefits budget for these new hires, totaling \$287,469 in new compensation costs. To offset nearly all these costs, the Fire Chief has reduced the overtime budget by \$209,076 as he will not need to pay existing firefighters overtime to fill as many shifts needed to keep all fire stations open – the additional one firefighter per shift can provide the staffing at straight time. Further, with the additional staffing, the ambulance service of the Fire Department will often be able to staff two ambulances simultaneously, something that cannot be done now. Coupled with other changes being implemented in the ambulance service in FY10 and FY11, the Chief projects the ambulance receipts will increase by \$58,000, which can be used to offset the costs of the new firefighters, leaving a net of \$20,393 to be covered by the tax levy under the Override Budget request.

The Police Department budget contains \$47,172 more in overtime, general expense and maintenance budgets, as well as funds for the Department to purchase a new hybrid gas efficient vehicle, to make the Town compliant with the Green Communities Act, and the Building Department would receive an additional \$15,203 for building maintenance in this budget.

The Finance Committee recommends approval of a FY11 Override Public Safety Budget of \$6,817,317 (Gross basis) less direct police grant offset of \$25,000 for a net appropriation total of \$6,792,317.

PUBLIC WORKS

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
PUBLIC WORKS				
Engineering	385,821	414,214	396,661	396,750
Streets & Roads	2,396,024	2,304,152	2,323,921	2,342,318
Trees and Cemetery	337,111	340,481	335,674	353,748
Parks and Grounds	287,632	284,335	238,767	273,623
Total Public Works	3,406,588	3,343,183	3,295,023	3,366,439
Employee Compensation	1,671,027	1,797,418	1,755,916	1,789,644
All Other Expenses	1,094,241	1,131,110	1,124,452	1,152,868
Snow & Ice	641,320	414,655	414,655	423,927
Total Public Works	3,406,588	3,343,183	3,295,023	3,366,439
Public Works Headcount (FTE)	32.70	31.86	31.28	31.86

The Public Works cluster includes the Engineering, Streets and Roads, Trees and Cemeteries, Parks and Grounds Divisions, and Transfer Station Enterprise Fund. The Transfer Station Enterprise Fund is voted separately at Town Meeting.

Non-Override Budget

The Non-Override Budget for this cluster is decreasing by \$48,160, or -1.44% compared to the FY10 appropriation. Most of the employees in this cluster are members of either the engineers union or the laborers union, and FY10 is the third year for both their current three-year contracts. Negotiations with them have only recently begun. The non-unionized employees, however, made the same health insurance concessions as other employees, and thus the FY10 budget has been adjusted for those salary changes. The FY11 budget has a 0% COLA for those employees, reflecting only step movement.

Under the Non-Override Budget, the Engineering, Trees & Cemeteries, and Parks & Grounds divisions will receive less in funding than in FY10. The primary reason for this reduction is a shifting of seasonal costs to the newly formed Field Maintenance Enterprise. Remaining costs in Parks & Grounds may increase later as contracts are settled with the employees of this group. The only division receiving budget growth is the Streets and Roads division, where the roadwork account will receive an increase of \$50,333. The cost of materials and contracts continues to rise over time in this area, and without such increased funding, this division cannot maintain the roads, walkways, guardrails, drainage structures, etc. to even the reduced level provided for in the FY10 budget. Unfortunately, the tree contractor line item is once again reduced; meaning fewer dead or diseased trees in the Town’s right of way can be removed on a timely basis.

The Finance Committee recommends approval of a FY11 Non-Override Public Works Budget of \$3,295,023.

Override Budget.

The FY11 Override Budget is increasing \$23,256 or 0.70% over the FY10 budget. Most of this is used to restore cuts made in the Non-Override Budget. However, an additional \$10,000 has been added to the tree contractor line item, and snow and ice materials have been increased \$9,272.

The Finance Committee recommends approval of a FY11 Override Public Works Budget of \$3,366,439.

HUMAN SERVICES

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
HUMAN SERVICES				
Board of Health	365,236	374,591	374,533	398,960
Council on Aging	135,241	141,273	146,102	152,987
Veterans Affairs	15,196	17,815	17,415	17,415
Total Human Services	515,673	533,679	538,050	569,362
Employee Compensation	353,965	370,075	380,683	386,968
All Other Expenses	161,708	163,605	157,367	182,394
Total Human Services	515,673	533,679	538,050	569,362
Human Services Headcount (FTE)	7.20	6.20	6.20	6.40

The Human Services cluster includes the Board of Health, Council on Aging, and Veterans' Affairs Offices. Starting in FY10, the Youth Commission function has been moved to the Culture & Recreation Division. Due to prior year budget cuts, the Family Services Department, through which a community outreach worker provided social services to older residents, has been eliminated and the Board of Health budget continues to have limited funds to contract for assistance in this area.

Non-Override Budget

The Non-Override Budget for this cluster is increasing \$4,370 over FY10. It is important to note that the FY10 budget shown differs from the appropriation figures contained in last year's warrant, due to the Town's negotiating health insurance concessions with its employees. All the employees in this cluster agreed to switch to rate savers plans and increase their premium contribution 5%, and in return, the salary schedule for FY10 was increased by an average 3% over FY09 salary schedules. Further, for FY11 the employees agreed to accept a 0% cost of living increase and contribute 2.5% more to their insurance premiums in exchange for adding a new step onto the top of most salary schedules. Thus, any changes in personnel costs in the Human Services area are due to step movement in FY11. To offset these salary increases, most departments have reduced budgets for non-personnel costs.

The Board of Health plans to change amounts slightly between various line items to better utilize funding, but overall there is a -.02% reduction. Council on Aging is up 3.42%, but because this department has so little in its expense budget to begin with, there is only a slight reduction that can be made to offset salary step increases. The Veterans Affairs Department is decreasing by

\$400 or -2.25% from FY10 in the area of Veteran’s benefits. Should actual Veteran’s benefits paid in FY11 exceed the Non-Override Budget, the department head will need to request a Reserve Fund transfer.

The Finance Committee recommends approval of a FY11 Non-Override Human Services Budget of \$538,050.

Override Budget

The Override Budget for this cluster is increasing by 6.69%, \$35,682 more than FY10. \$15,000 has been added to provide for a hazardous waste collection day in Sudbury, an important environmental service that has not been offered for several years. In addition, \$6,285 is included to increase the hours of the part time information/referral assistant at the Senior Center. The calls for service in this area have grown hugely and the hours will allow this need to be met.

The Finance Committee recommends approval of a FY11 Override Human Services Budget of \$569,362.

CULTURE & RECREATION

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
CULTURE & RECREATION				
Goodnow Library	953,787	986,268	996,133	1,020,839
Recreation	118,468	146,728	138,190	149,905
Historical Commission	5,356	5,390	5,309	5,309
Historic Districts Commission	2,718	2,666	2,692	2,692
Total Culture & Recreation	1,080,329	1,141,052	1,142,324	1,178,745
Employee Compensation	753,422	771,337	781,055	794,706
All Other Expenses	326,907	369,715	361,269	384,039
Total Culture & Recreation	1,080,329	1,141,052	1,142,324	1,178,745
Culture & Recreation Headcount (FTE)	18.11	16.63	16.12	16.63

The Culture & Recreation cluster includes the Goodnow Library, Recreation Department, Historical Commission, and the Historic Districts Commission. Starting in FY10, the Youth Commission function has been moved to within the Recreation Department. And starting in FY10, the Town began sharing a Recreation Director with the Town of Wayland. The Atkinson Pool Enterprise Fund will be voted separately at Town Meeting.

Non-Override Budget

The Non-Override Budget for this cluster is increasing by 0.11% or \$1,272 from FY10. It is important to note that the FY10 budget shown differs from the appropriation figures contained in last year’s warrant, due to the Town’s negotiating health insurance concessions with its employees. All the employees in this cluster agreed to switch to rate savers plans and increase their premium contribution 5%, and in return, the salary schedule for FY10 was increased by an

average 3% over FY09 salary schedules. Further, for FY11 the employees agreed to accept a 0% cost of living increase and contribute 2.5% more to their insurance premiums in exchange for adding a new step onto the top of most salary schedules. Thus, any changes in personnel costs in the Culture & Recreation area are due to step movement in FY11.

The Goodnow Library is increasing slightly by \$9,865, or 1% compared to FY10. To offset increasing personnel costs of \$17,814, the Library will be reducing expenses by \$7,950. Even with a positive budgetary growth, the Library will be reducing approximately 11 staffing hours on a weekly basis.

The Recreation Department suffers a -5.82% reduction with the elimination of the Teen Center Coordinator from the budget, saving \$8,538 compared to FY10. This does not mean the definite elimination of the Teen Center program however. Town staff will be working with the Recreation Commission to redefine the program and position and attempt to sustain this program on a 100% fee basis if there are no additional funds from an override.

The Finance Committee recommends approval of a FY11 Non-Override Culture & Recreation budget of \$1,142,324.

Override Budget.

The FY11 Override Budget is increasing \$37,693 or 3.3% over the FY10 budget. These funds will be used to retain the Teen Center Coordinator position at a reduced level of funding, and restore the expense cuts planned for the Library plus add small amounts to allow for inflation and increases in the costs of books and materials.

The Finance Committee recommends approval of a FY11 Override Culture & Recreation Budget of \$1,178,745.

TOWN-WIDE OPERATING AND TRANSFER ACCOUNTS

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
Unclassified & Transfers				
Town-Wide Operating Expenses	70,643	92,300	90,900	95,050
Town Reserve Account	0	160,000	160,000	220,127
Salary Contingency Account	0	126,319	51,985	66,985
Total Unclassified & Transfers	70,643	378,619	302,885	382,162

The Unclassified and Transfer Accounts budget line item is made up of two categories – Town Wide Operating Expenses and Transfer Accounts.

Unclassified

This budget includes expenses that do not fit precisely into other cost centers and are shared by many departments or support Town-wide functions and responsibilities. Expenses include copiers, postage, telephone, Town Report, Town Meeting, the Memorial Day celebration and the July 4th parade.

Non-Override and Override Budget

The Unclassified Town Wide Operating Expenses are decreasing by \$1,400 from FY10 levels under the Non-Override Budget. Costs are increasing in areas such as postage and paper supplies, so the Town will have to manage this very carefully if there are no additional funds. The Override Budget increases the postage, copier supplies, telephone and Town Meeting expenses slightly to account for increasing costs and demands on these accounts.

Transfer Accounts

Transfer accounts are for Town operating department needs only. There are two transfer accounts – the Reserve Fund and the Salary Adjustment Account.

Reserve Fund, Non-Override and Override Budget

Since the Town Manager does not have the same flexibility and authority to move funds as the schools to meet emergencies or unforeseen needs arising during the year, the Reserve Fund is used as a source of funds to meet those instances. Money cannot be spent from the Reserve Fund without approval of the Finance Committee. Many Town departments face unexpected events and costs during the fiscal year, such as increases in the cost of gasoline or utilities, demand for veteran's benefits, vehicles needing significant repair or replacement, damages to systems in Town buildings or infrastructure, criminal cases that require additional overtime in the Police Department, among many, many others.

Under the Non-Override Budget scenario, the Reserve Fund will remain at the FY10 level. However, under the Override Budget, \$79,277 has been added to provide a cushion to absorb the recurring shortfall in funds appropriated for the DPW's snow and ice budget. In the past two years, final spending for snow and ice has exceeded the appropriated amounts by an average of \$254,000. It might appear to make sense to add extra funds directly into the DPW accounts. But putting extra funds here instead is a prudent means to be prepared for these variable costs, as adding these amounts directly to the DPW line item means the Town must appropriate that same amount in the following year, per state law, to be able to deficit spend for this service, thus losing flexibility if there is a mild winter. Having an adequately funded Reserve Fund provides the cushion if there is a severe winter, but also allows the funds to be used elsewhere if an unexpected situation arises outside the DPW budget. When the Reserve Fund is drawn upon, the funds are transferred into the department facing the unexpected spending need.

Salary Adjustment Account, Non-Override and Override Budget

The salary adjustment account is established and funded in anticipation of collective bargaining agreement settlements for Town employees. Like the Reserve Fund, the salary adjustment account requires Finance Committee approval for the funds to be transferred into other line items; the amounts are limited to supplementing the Town departments, not the schools, who have the legal bottom line to move money without using transfer funds. The salary adjustment account is less than the original FY10 appropriated levels as only two unions will not be settled at that time (assuming the firefighters and dispatchers are settled in FY10 at levels similar to other employee groups).

As with the Reserve Fund, as the year progresses, amounts are transferred to the Town departments, reducing the balance in the transfer account.

The Finance Committee recommends approval of a FY11 Non-Override Budget for Unclassified and Transfer Accounts of \$302,885 and a FY11 Override Budget for Unclassified and Transfer Accounts of \$382,162.

BENEFITS AND INSURANCE

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Non-Override
BENEFITS & INSURANCE				
Worker's Compensation	27,009	27,900	30,690	30,690
Unemployment Compensation	52,610	41,730	46,738	46,738
Medicare Tax	413,942	434,970	487,166	487,166
Life Insurance	3,700	5,600	5,600	5,600
Medical Claims/ Insurance	7,519,349	6,759,909	6,962,893	6,962,893
Health Insurance Reserve	-	274,703	-	-
Retirement Program	2,621,713	2,748,654	2,851,124	2,851,124
Property/Liab. Insurance	215,912	246,270	275,822	275,822
New Hires Estimate	-	-	-	98,885
Benefits Offsets	-	-	(14,280)	(14,280)
Total: Employee Benefits	10,854,235	10,539,736	10,660,033	10,758,918

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Non-Override
BENEFITS & INSURANCE				
Town	4,153,667	4,159,598	4,209,905	4,308,790
Schools	6,700,568	6,380,138	6,450,128	6,450,128
	10,854,235	10,539,736	10,660,033	10,758,918

Non-Override and Override Budget

This budget is for the benefits and insurance needs of Sudbury Public Schools (SPS) and Town departments only. The only difference between the two budgets is the projected cost of benefits for hiring four new firefighters. For each new benefited position that is created, the Town must pay current costs and put aside funds for future costs. The primary current cost is for health insurance, and the future costs are for pensions and health insurance for when these employees retire sometime in the future. The budget estimate used here is for the Town to pay 70% of the premium for a rate saver HMO plan, as most Town and all SPS employee groups have agreed through the collective bargaining process that new employees will pay the cost of HMO plan premiums on a 70/30 basis, for a cost of \$16,800. The Town also estimates an average annual cost of \$4,005 for all other current and future benefit costs, except for so-called Other Post Retirement Benefits (OPEB). Finally, the Town needs to begin setting aside funds to pay for the cost of health insurance for retired employees. The Town pays 50/50 for the cost of retiree's health insurance plans, the minimum share allowed for towns or school districts to pay toward these costs. It is now recognized that towns and school districts should be setting aside funds to provide for those future costs. The Town has accepted Section 18, which means that all our retirees will be covered by Medicare when they reach 65, which minimizes the cost of retiree health insurance. This budget recommends that for all future hires, \$3,916 be set aside for this unfunded cost. In total, there is a projected cost of \$24,721 for the benefits for each new hire.

Worker's Compensation – This budget has been increased slightly as dividends earned through our participation in a joint purchase pool comprised of municipalities and school districts throughout the Commonwealth, and our moderate claims history, continue to substantially cover the cost of this coverage.

Life Insurance – level funded to FY10.

Unemployment – This has been increased by 12% over the prior year. The budget for this line item has been exceeded significantly during the past year due to reductions in force necessitated by budget cuts, particularly in the Sudbury Public Schools. Should further personnel cuts be necessary this line item will be exceeded once again; if personnel cuts can be avoided or minimized this budgeted amount should be adequate for the cost of unemployment benefits.

Medicare Tax – This reflects an increase of 12% over the prior year. This tax is mandated by the federal government. Annual increases in this tax liability have been reflective of a rise in total Town payroll subject to this tax, as more senior employees whose wages were not subject to the tax depart and are replaced by newly- hired employees whose wages are now fully subject to this tax liability.

Medical Claims/Insurance – This reflects an overall decrease of approximately 7% compared to the projected final FY10 appropriation. The final FY10 amounts are not known at this time, as the Town is still in negotiation with some unions. The Town will likely need to use some of the funds voted into the health insurance reserve fund to reach settlement with these groups. This cost reduction has been achieved by the implementation of two major changes in the Town's group health insurance program. These changes are: 1) increases in the share of monthly premiums paid by employees represented by SPS collective bargaining units as set by contracts and also paid by non-union employees of both the Town and SPS as determined by a vote of the Board of Selectmen; and 2) increases in the cost share paid by those employees for medical services covered under the health insurance plans. Since such changes are mandatory subjects of collective bargaining under Massachusetts law negotiations are ongoing with Town collective bargaining units in an effort to make the same changes applicable to the union employees they represent.

Retirement Program - Projected to increase by approximately 4% over FY10. 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 - Increased by a factor of approximately 12% due to increases in 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.

The Finance Committee recommends approval of a FY11 Non-Override Budget for \$10,660,033 and a FY11 Override Budget for \$10,758,918.

DEBT SERVICE

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
DEBT SERVICE				
Short-term Loan Interest	-	-	-	-
Long Term Bond Int.	1,277,060	1,151,604	1,025,354	1,025,354
Long Term Bond Principal	3,070,000	3,110,000	3,155,000	3,155,000
New issues for capital items	-	-	-	-
LSRHS Debt Service, Sudbury Portion	2,394,071	2,298,949	2,237,147	2,237,147
Total: Debt Service	6,741,131	6,560,553	6,417,501	6,417,501
NON-EXEMPT DEBT/ADJUSTMENTS				
Non-Exempt Debt Issues	-	-	-	-
Premium on Bonds	(8,408)	(7,007)	(5,605)	(5,605)
SBAB Debt Reimbursement	(1,702,596)	(1,702,596)	(1,702,596)	(1,702,596)
DE-1 Tax Recap Adjustments	-	-	-	-
Sub-Total: Non-exempt debt adjustments	(1,711,004)	(1,709,603)	(1,708,201)	,708,201)
Total Exempt Debt to be raised	5,030,127	4,850,950	4,709,300	4,709,300

The Debt Service budget provides for the repayment of principal and interest on the long-term debt of both the Town and the Lincoln Sudbury Regional School District (“LSRSD”). The Town issues debt pursuant to votes of Town Meeting to begin construction projects or purchase expensive equipment or real property. The maximum amount of debt is authorized by Town Meeting, and then the Town Treasurer issues the debt after working with the Town Manager and the Town’s Financial Advisor pending the approval of the Board of Selectmen. The treasurer of LSRSD issues its debt after working with the LSRSD School Committee, the School District’s Financial Advisor and pursuant to votes of Town Meetings of both Lincoln and Sudbury.

The budget request for FY11 is for an appropriation of \$4,180,354, which is the total amount of GROSS debt service payments required for all Town of Sudbury debt. A state grant, estimated at \$1,702,596, will be used to pay part of the debt service associated with school construction projects. Town debt service payments fall into the following major bond issue categories: Town Buildings and projects, Land Acquisitions, and Sudbury Public Schools projects. The appropriation for LSRSD debt service payment for FY11, \$2,237,147, is not requested in this budget as such but rather is requested within the LSRSD assessment.

The Finance Committee recommends approval of a FY11 Town of Sudbury Debt Service Budget of \$4,180,354.

CAPITAL SPENDING

	FY09	FY10	FY11	FY11
	Actual	Budget Non-Override	Non-Override	Override
Capital & Capital Articles				
CIPC Items	513,042	523,383	527,067	529,054
Total Capital & Articles	513,042	523,383	527,067	529,054

	FY09	FY10	FY11	FY11
	Actual	Budget Non-Override	Non-Override	Override
Capital				
Town Buildings	109,500	70,000	114,784	116,771
General Government	12,200	22,622	11,955	11,955
Public Safety	21,400	25,000	10,000	10,000
Public Works	354,942	325,761	298,328	298,328
Culture & Recreation	15,000	80,000	42,000	42,000
Town Center	0	0	0	0
Sudbury Public Schools	0	0	50,000	50,000
Total: Operating Expenses	513,042	523,383	527,067	529,054

Non-Override Budget

The Finance Committee recommends approval of a FY11 Override Capital Budget of \$527,067.

Override Budget

The Finance Committee recommends approval of a FY11 Override Capital Budget of \$529,054.

CAPITAL IMPROVEMENT PLANNING COMMITTEE REPORT

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.

The Capital Improvement Planning Committee (“Committee”) reviewed each department’s five-year capital plan in order to prioritize requests and make recommendations for expenditures in FY11.

The Committee held 2 hearings on November 18 and 19 2009. Following its review, the Committee voted to recommend that the following capital items be funded through FY11 Operating Budgets subject to available funding:

Projects	FY11		Notes
	Non-Override	Override	
Ongoing Project Leases:			
Unit #8: 2009 John Deere loader	27,315	27,315	Started FY10
Unit #14 2009 Chevy pick-up	6,735	6,735	Started FY10
Unit #20 2009 6-Wheel Dump Truck	26,500	26,500	Started FY10
Landscape Tractor w/Bucket	9,500	9,500	Started FY10
Unit #22 2009 John Deere Backhoe	25,183	25,183	Started FY09
Unit #27 2007 Mack 10-Wheel	27,390	27,390	Started FY09
Unit #33 2009 Tractor	25,230	25,230	Started FY09
Unit #5 2008 10-wheel dump truck	23,977	23,977	Started FY08
Unit #24 2008 6-wheel dump truck	28,053	28,053	Started FY08
Unit #23 6-wheel dump chip	18,535	18,535	Started FY08
Unit #3 2007 6-wheel dump truck	25,410	25,410	Last installment
MUNIS Tax Software	11,955	11,955	Last installment
Ongoing leases	255,783	255,783	
DPW:			
Tractor with mower (#35)	23,500	23,500	5 year lease \$117,500
Sweeper (#36)	31,000	31,000	5 year lease \$155,000
	54,500	54,500	
Park & Rec:			
Building renovation with asbestos removal	42,000	42,000	
Town Buildings:			
Various building improvements	56,784	58,771	
Senior center roof & skylight	58,000	58,000	
	114,784	116,771	
School Buildings:			
Nixon rooftop library HVAC and renovation	50,000	50,000	
Public Safety:			
Live scan fingerprint system (Police)	10,000	10,000	
Total FY11 Projects	527,067	529,054	

The Committee also supported the construction of a new Police station for a total estimated cost of \$6.2M. This project is covered in article 27, and is separate from the capital spending article.

Non-Override Budget

The Capital Improvement Planning Committee recommends approval of a FY11 Override Capital Budget of \$527,067.

Override Budget

The Capital Improvement Committee recommends approval of a FY11 Override Capital Budget of \$529,054.

Status of the Capital Projects Funded for FY09

Starting this year, the Committee will report on the status of the projects approved in the previous fiscal year (concluded as of this budget cycle). Status of the projects funded for FY09 (July 1, 2008 through June 30, 2009):

DPW Equipment:

- 1988 Bombardier (# 33) Lease
Approved: \$24,400; Spent \$25,231
- 1997 Melrose Bobcat (# 26)
Approved \$50,000; Spent \$46,670
- 1988 John Deer Backhoe (# 22) Lease
Approved \$27,000; Spent \$25,183
- 1992 Mack 6 Wheel Dump (# 27) Lease
Approved \$28,000; Spent \$27,390

Park & Rec:

- Backroom Maintenance + ADA (Replace door and various maintenance at Pool
Approved \$15,000; Spent \$15,000

Town General:

- MUNIS Tax Software: Approved \$12,200; Spent \$12,200

Town Buildings:

- Flynn HVAC Computer Room
Approved \$17,000; Spent \$17,000
- Various building improvements
Approved \$52,500; Spent \$29,528
Energy savings lighting improvements – Flynn & Highway Blds (\$11,683)
Police Station HVAC upgrade (\$13,597)
Flynn Building fire alarm upgrade (\$3,220)
Parks & Grounds Building bathroom (\$2,665)
Senior Center Painting (\$762)
- Town Hall Painting
Approved \$30,000; Spent \$30,000
The entire front of the building and the side fascias were completed in September 2008. This portion totaled \$13,000. The remaining balance of \$17,000 is to be used for the gable ends, windows and doors.
- DPW HVAC
Approved \$10,000
The PBC continued to examine the deficiencies of the mechanical design and construction problems through FY09. We continue to pursue appropriate changes to correct construction issues.

Public Safety:

- Fire Stations Design Study
Approved \$11,400
It was anticipated that an outside vendor would survey our buildings, review our needs, and provide recommendations for building improvements. Instead this work was done within the Permanent Building Committee at no cost but was not completed until FY10.
- Replace Fire Station HQ Bathroom floor
Approved \$10,000; Spent Under \$500
Instead of replacing the bathroom floor, it was determine by the Building Department that a suitable alternative was to install a raised threshold at the doorway. The intent of the floor replacement was to avoid future water damage from an overflowing toilet or sink. Installing the threshold dam acts to impound the water in the bathroom and force it down the floor drain.

ENTERPRISE FUNDS

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
ENTERPRISE FUND EXPENDITURES				
Transfer Station	263,368	302,087	271,437	271,437
Pool	438,924	482,656	489,868	489,868
Recreation Field Maintenance	0	160,345	221,497	187,769
Total Enterprises (Direct)	702,292	945,088	982,802	949,074

	FY09	FY10	FY11	FY11
	Actual	Budget	Non-Override	Override
ENTERPRISE FUND REVENUES				
Transfer Station	316,432	331,683	301,032	301,032
Pool	457,927	482,656	489,868	489,868
Recreation Field Maintenance	0	160,299	221,497	221,497
Total Enterprises Revenues	774,359	974,638	1,012,397	1,012,397

The Transfer Station Enterprise Fund operates the transfer station, providing recycling, landfill monitoring, and the hauling and disposal of waste. As an enterprise fund, the Transfer Station Enterprise Fund covers all of its direct and indirect costs and is not supported by the general tax levy or any other general revenue source. The transfer station is self-sustaining and has a stable group of users.

The Finance Committee recommends approval of a FY11 Non-Override and Override Budgets of \$271,437 for the Transfer Station Enterprise Fund.

The Atkinson Pool Enterprise Fund pays for the direct costs of the operation of the Atkinson Pool. Enterprise funds are meant to be self-supporting, meaning they should be able to generate sufficient revenue to pay for all direct and indirect costs, as well as set aside funds for future maintenance and repairs to the facility, but does not pay for the cost of health insurance and pensions. However, the Pool does continue to support all of its direct operating costs.

The Finance Committee recommends approval of a FY11 Non-Override and Override Budgets of \$489,868 for the Atkinson Pool Enterprise.

The Recreation Field Maintenance Enterprise Fund pays for the direct costs associated with the maintenance and upkeep of the Town's many recreational playing fields. As an enterprise fund, the Recreational Field Maintenance covers all of its direct and indirect costs and is not supported by the general tax levy. Furthermore, costs previously borne by the tax levy to support recreational fields will be assumed by the Enterprise as new revenue streams are developed.

The Finance Committee recommends approval of a FY11 Non-Override Budget of \$221,497 and Override Budget of \$187,769 for the Recreational Field Maintenance Enterprise Fund.

COMMUNITY PRESERVATION FUND

<u>Sudbury Community Preservation Fund Balance Statement</u>			
	FY09 ⁶	FY10	FY11
CPA Operating Fund - 2044	Actual	Appropriated	Budget
Beginning Fund Balance	\$ 6,622,376	\$ 6,773,933	\$ 6,969,155
Revenues:			
CPA Surcharge & Fees	1,435,927	1,400,000	1,400,000
State Match	965,898	539,676	406,000
Interest Income	250,221	125,000	200,000
Total Revenues	2,652,046	2,064,676	2,006,000
Expenditures			
Debt Service ¹	690,072	1,124,454	1,052,034
Admin	98,817	95,000	80,000
Open Space	102,300	25,000	-
Community Housing ²	600,000	-	-
Historic Preservation	257,000	417,000	167,795
Recreation	2,300	-	200,000
Total Expenditures	1,750,489	1,661,454	1,499,829
Excess/(Deficiency)	901,557	403,222	506,171
Transfers In/(Out) ³	(750,000)	(208,000)	(180,000)
Ending CPA Operating Fund Balance	\$ 6,773,933	\$ 6,969,155	\$ 7,295,326
	FY09 ⁶	FY10	FY11
	Actual	Appropriated	Budget
Fund Balance Breakdown			
Reserved ^{5, 6}	\$ 454,583	\$ 454,583	\$ 454,583
Unreserved	\$ 6,319,350	\$ 6,514,572	\$ 6,840,743
	\$ 6,773,933	\$ 6,969,155	\$ 7,295,326
Year-end Cash Operating Balance ^{4,6}	\$6,775,029		
Exhibit Notes			
1 Debt Service allocation:	FY09	FY10	FY11
Open Space	91.4%	94.8%	94.5%
Recreation	7.0%	4.2%	4.4%
Historic Preservation	1.6%	0.6%	1.0%
2 Community Housing represents funds to non-town entities for Community Housing projects.			
3 Transfers In/(Out) represents appropriations made between Town funds. For CPA this line item represents funds appropriated (and given to) Sudbury Housing Trust for Comm. Housing Projects.			
4 The difference between fund balance and year-end cash balance arises from encumbrances and accruals recorded against the fund but not yet paid out from the cash accounts.			
5 Reserved Fund Balance represents that part of the CPA program reserved for a particular purpose. This may include encumbrances, accruals, current liabilities and mandated reserve allocations.			
6 FY09 annual audit not final as of warrant printing.			

	FY09 ³	FY10	FY11
CPA Project Fund - 3400	Actual	Appropriated	Budget
Beginning Fund Balance	\$ 1,595,646	\$ 1,735,334	\$ 1,407,334
Net CPA Project Activity ⁴	139,688	(328,000)	(232,205)
Ending CPA Project Fund Balance	\$ 1,735,334	\$ 1,407,334	\$ 1,175,129
	FY09 ³	FY10	FY11
	Actual	Appropriated	Budget
Fund Balance Breakdown:			
Reserved ^{1, 3}	\$ 1,735,334	\$ 1,407,334	\$ 1,175,129
Unreserved	\$ -	\$ -	\$ -
Year-end Cash Project Balance ^{2,3}	\$1,240,611		
Exhibit Notes			
1 Reserved Fund Balance represents that part of the CPA program reserved for a particular purpose. This may include encumbrances, accruals, current liabilities and mandated reserve allocations.			
2 The difference between fund balance and year-end cash balance arises from encumbrances and accruals recorded against the fund but not yet paid out from the cash accounts.			
3 FY09 annual audit not final as of warrant printing.			
4 Net sources and uses of funds for projects during the fiscal year.			
	FY09	FY10	FY11
CPA Consolidated Statement	Actual	Appropriated	Budget
Beginning Fund Balance	\$ 8,218,022	\$ 8,509,267	\$ 8,376,489
Net CPA Activity (during for fiscal year)	291,245	(132,778)	93,966
Ending Fund Balance	\$ 8,509,267	\$ 8,376,489	\$ 8,470,455
	-	-	-
Fund Balance Breakdown			
Reserved	\$ 2,189,917	\$ 1,861,917	\$ 1,629,712
Unreserved	\$ 6,319,350	\$ 6,514,572	\$ 6,840,743
Year-end Cash Balance	\$8,015,640		
Consolidated view combines balances and activities for both CPA Operating (#2044) and CPA Project (#3400) Funds			

LONG-TERM DEBT INFORMATION

TOWN DEBT SCHEDULE BY ISSUANCE DATE

	12/1/2000	10/1/2001	4/1/2003	2/15/2005	Total	Annual Debt Service	Remaining Principal
FY 10 Principal	1,265,000	710,000	525,000	610,000	3,110,000		
FY 10 Interest	126,500	286,960	78,750	659,394	1,151,604	4,261,604	25,900,000
FY 11 Principal	1,265,000	710,000	525,000	655,000	3,155,000		
FY 11 Interest	63,250	258,560	63,000	640,544	1,025,354	4,180,354	22,745,000
FY 12 Principal		585,000	525,000	1,880,000	2,990,000		
FY 12 Interest		232,360	42,000	619,500	893,860	3,883,860	19,755,000
FY 13 Principal		500,000	525,000	1,850,000	2,875,000		
FY 13 Interest		208,375	21,000	555,131	784,506	3,659,506	16,880,000
FY 14 Principal		500,000		1,830,000	2,330,000		
FY 14 Interest		187,125		491,044	678,169	3,008,169	14,550,000
FY 15 Principal		500,000		1,810,000	2,310,000		
FY 15 Interest		165,250		424,800	590,050	2,900,050	12,240,000
FY 16 Principal		500,000		1,695,000	2,195,000		
FY 16 Interest		142,750		356,925	499,675	2,694,675	10,045,000
FY 17 Principal		500,000		1,615,000	2,115,000		
FY 17 Interest		119,750		292,900	412,650	2,527,650	7,930,000
FY 18 Principal		500,000		1,605,000	2,105,000		
FY 18 Interest		96,625		228,400	325,025	2,430,025	5,825,000
FY 19 Principal		500,000		1,365,000	1,865,000		
FY 19 Interest		72,875		168,800	241,675	2,106,675	3,960,000
FY 20 Principal		500,000		1,445,000	1,945,000		
FY 20 Interest		48,875		118,400	167,275	2,112,275	2,015,000
FY 21 Principal		500,000		1,515,000	2,015,000		
FY 21 Interest		24,500		30,300	54,800	2,069,800	0
All Principal	2,530,000	6,505,000	2,100,000	17,875,000	29,010,000		
All Interest	189,750	1,844,005	204,750	4,586,138	6,824,643		
TOTAL	2,719,750	8,349,005	2,304,750	22,461,138	35,834,643		

AUTHORIZED, BUT UNISSUED DEBT

Date Authorized	Permanent Debt Issued Purpose	Total Authorized	Amount Issued	Unissued 12/31/09	Date Issued	Maturity Date	Article Number
2/24/1997	Septic System Betterment Loan Program	200,000	-	200,000			97-27
4/2/2001	Public Works Facility Construction	4,733,800	4,730,000	3,800	4/1/2003	6/30/2013	01-7A
4/1/2002	Wastewater Feasibility	90,000	-	90,000			02-24
4/5/2005	Capital Equipment/Rennov.	650,000	636,500	13,500	6/15/2005	6/15/2010	05-11
Totals		5,673,800	5,366,500	307,300			

Article has been submitted for April 2010 Town Meeting to rescind unissued balances as of 12/31/2009

FY11 LONG-TERM DEBT SERVICE DETAIL

Issuance		Budget
Date	Project	FY11
12/1/2000	Curtis Middle School	982,905
12/1/2000	Haynes Elementary	345,345
10/1/2001	Loring Elementary	800,200
10/1/2001	Haskell Field	20,800
10/1/2001	Traffic Signal (Rt. 117)	14,560
10/1/2001	Featherland	20,800
10/1/2001	Refunding 1992 Issue Unisys/Melone	112,200
4/1/2003	DPW	476,000
4/1/2003	K-8 Schools Remainder	112,000
2/15/2005	Curtis Refunding 2000 Issue	506,516
2/15/2005	Haynes Refunding 2000 Issue	177,965
6/15/2005	Weisblatt Land Refunding 1999 Issue	354,417
6/15/2005	Meachen Land Refunding 1999 Issue	256,646
-----	Town Projects Subtotal	4,180,354
-----	L-S assessment, Sudbury share	2,237,147
Total Debt Service (gross)		6,417,501
Adjustments to debt		
	Premium on Bonds	(5,605)
	SBAB Debt Reimbursement	(1,702,596)
	DE-1 Tax Recap Adjustments	-
Total Adjustments		(1,708,201)
Total exempt debt to be raised by taxation		4,709,300

L-S DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date			Total	Annual Debt Service	Remaining Principal
	FY05	FY07	FY09			
FY10 Principal	1,400,000	550,000	200,000	2,150,000		
FY10 Interest	206,690	355,300	33,500	595,490	2,745,490	15,000,000
FY11 Principal	1,400,000	550,000	200,000	2,150,000		
FY11 Interest	167,267	336,050	23,750	527,067	2,677,067	12,850,000
FY12 Principal	1,400,000	550,000	200,000	2,150,000		
FY12 Interest	127,844	316,800	14,250	458,894	2,608,894	10,700,000
FY13 Principal	1,400,000	550,000	200,000	2,150,000		
FY13 Interest	87,294	297,550	4,750	389,594	2,539,594	8,550,000
FY14 Principal	1,400,000	550,000		1,950,000		
FY14 Interest	45,055	277,613		322,668	2,272,668	6,600,000
FY15 Principal		550,000		550,000		
FY15 Interest		254,925		254,925	804,925	6,050,000
FY16 Principal		550,000		550,000		
FY16 Interest		231,550		231,550	781,550	5,500,000
FY17 Principal		550,000		550,000		
FY17 Interest		210,238		210,238	760,238	4,950,000
FY18 Principal		550,000		550,000		
FY18 Interest		188,925		188,925	738,925	4,400,000
FY19 Principal		550,000		550,000		
FY19 Interest		166,925		166,925	716,925	3,850,000
FY20 Principal		550,000		550,000		
FY20 Interest		144,925		144,925	694,925	3,300,000
FY21 Principal		550,000		550,000		
FY21 Interest		122,925		122,925	672,925	2,750,000
FY22 Principal		550,000		550,000		
FY22 Interest		100,925		100,925	650,925	2,200,000
FY23 Principal		550,000		550,000		
FY23 Interest		78,925		78,925	628,925	1,650,000
FY24 Principal		550,000		550,000		
FY24 Interest		56,650		56,650	606,650	1,100,000
FY25 Principal		550,000		550,000		
FY25 Interest		34,031		34,031	584,031	550,000
FY26 Principal		550,000		550,000		
FY26 Interest		11,344		11,344	561,344	0
All Principal	7,000,000	9,350,000	800,000	17,150,000		
All Interest	634,150	3,185,600	76,250	3,896,000		
TOTAL	7,634,150	12,535,600	876,250	21,046,000		

The Town of Sudbury is responsible for a portion of the District’s annual debt service. For further details, see LSRHS and Debt Service narratives.

CPF DEBT SCHEDULE BY ISSUANCE DATE

	Issuance Date				Total	Annual Debt Service	Remaining Principal
	6/15/2004	6/15/2004	6/15/2005	6/15/2009			
FY10 Principal	277,216	17,784	135,000	255,000	685,000		
FY10 Interest	152,273	9,768	82,413	127,821	372,275	1,057,275	10,305,000
FY11 Principal	277,216	17,784	135,000	255,000	685,000		
FY11 Interest	141,877	9,102	77,688	138,369	367,035	1,052,035	9,620,000
FY12 Principal	277,216	17,784	135,000	255,000	685,000		
FY12 Interest	131,482	8,435	72,963	131,994	344,873	1,029,873	8,935,000
FY13 Principal	277,216	17,784	135,000	255,000	685,000		
FY13 Interest	120,393	7,723	68,238	126,894	323,248	1,008,248	8,250,000
FY14 Principal	277,216	17,784	135,000	255,000	685,000		
FY14 Interest	109,304	7,012	63,175	121,794	301,285	986,285	7,565,000
FY15 Principal	220,833	14,167	135,000	255,000	625,000		
FY15 Interest	98,216	6,301	58,113	116,375	279,004	904,004	6,940,000
FY16 Principal	220,833	14,167	135,000	255,000	625,000		
FY16 Interest	89,382	5,734	53,050	110,478	258,644	883,644	6,315,000
FY17 Principal	220,833	14,167	135,000	255,000	625,000		
FY17 Interest	80,218	5,146	47,650	104,263	237,276	862,276	5,690,000
FY18 Principal	220,833	14,167	130,000	255,000	620,000		
FY18 Interest	70,832	4,544	42,250	97,569	215,195	835,195	5,070,000
FY19 Principal	220,833	14,167	130,000	250,000	615,000		
FY19 Interest	61,171	3,924	37,050	90,313	192,458	807,458	4,455,000
FY20 Principal	220,833	14,167	130,000	250,000	615,000		
FY20 Interest	51,233	3,287	31,850	82,813	169,183	784,183	3,840,000
FY21 Principal	220,833	14,167	130,000	250,000	615,000		
FY21 Interest	41,296	2,649	26,650	75,313	145,908	760,908	3,225,000
FY22 Principal	220,833	14,167	130,000	250,000	615,000		
FY22 Interest	31,138	1,998	21,450	67,500	122,085	737,085	2,610,000
FY23 Principal	220,833	14,167	130,000	250,000	615,000		
FY23 Interest	20,869	1,339	16,250	59,375	97,833	712,833	1,995,000
FY24 Principal	220,833	14,167	130,000	250,000	615,000		
FY24 Interest	10,490	673	10,888	51,094	73,144	688,144	1,380,000
FY25 Principal			130,000	250,000	380,000		
FY25 Interest			5,525	42,500	48,025	428,025	1,000,000
FY26 Principal				250,000	250,000		
FY26 Interest				33,594	33,594	283,594	750,000
FY27 Principal				250,000	250,000		
FY27 Interest				24,375	24,375	274,375	500,000
FY28 Principal				250,000	250,000		
FY28 Interest				14,844	14,844	264,844	250,000
FY29 Principal				250,000	250,000		
FY29 Interest				5,000	5,000	255,000	0
All Principal	3,594,415	230,585	2,120,000	5,045,000	10,990,000		
All Interest	1,210,173	77,634	715,200	1,622,274	3,625,281		
TOTAL	4,804,588	308,219	2,835,200	6,667,274	14,615,281		

CPF (Community Preservation Fund): A special revenue fund used to account for the 3% on local real estate tax surcharge on non-exempt property (and matching state trust fund distribution) that can be used for open space, historic resource and affordable housing purposes. Occasionally, the Town will borrow long-term funds for CPF purposes. This schedule shows all debts outstanding relating to CPF. CPF debt service is budgeted and paid for separately from all other Town activities.

APPENDICES

APPENDIX I. BUDGET TERMS AND DEFINITIONS

Abatements and Exemptions (previously called Overlay): An amount set by the Assessors to create a fund to cover abatements of (and exemptions from) real and personal tax assessments for the current year, and raised on the tax levy. An abatement is a reduction provided by the Assessors in the assessed tax because of bona fide specific conditions or situations not considered when the tax was levied. An exemption is provided for a variety of purposes, which include, but are not limited to: buildings/property used for religious, government, charity, or pollution control. In addition, exemptions may also be provided to the elderly, handicapped, and veterans under certain conditions.

Abatement Surplus: Accumulation of the surplus amounts of Abatements and Exemptions set aside by the Assessors each year to cover abatements of (and exemptions from) real estate and personal property tax assessments. The accumulated amount for previous years no longer committed for abatements may be used by vote of the Town Meeting.

Benefits and Insurance: This account in the shared expenses section of the budget is comprised primarily of benefits such as health insurance and retirement for both school and general government employees.

Capital Exclusion: A temporary increase in the tax levy to fund a capital project or make a capital acquisition.

Cherry Sheet: An annual statement received from the Department of Revenue detailing estimated receipts for the next fiscal year from the various state aid accounts as well as estimated state and county government charges payable to the state. The name “Cherry Sheet” derives from the color of the paper used.

Debt Exclusion: An override to Proposition 2 ½ for the purpose of raising funds for debt service costs; remains for the life of the debt only.

Enterprise Fund: A separate fund, set up to provide a specific Town service, whereby all direct and indirect/overhead costs of providing the service are funded in total from user charges. An appropriation for an enterprise fund is funded in total from enterprise fund revenue unless otherwise noted. Enterprise fund revenue used to fund services provided by other Town departments will be shown in the warrant after the appropriation total for the department. An enterprise fund is required to fully disclose all costs and all revenue sources needed to provide a service.

Free Cash: Free cash is the available, undesignated fund balance of the general fund and is generated when actual revenue collections are in excess of estimates, when expenditures are less than appropriated, or both. A free cash balance is certified as of July 1 each year by the Department of Revenue and once certified, any or all of the certified amount may be used to defray Town expenses by a vote of the Town Meeting.

APPENDIX I. BUDGET TERMS AND DEFINITIONS CONT'D

Funding Sources for Expenditures: Authorizations for the Town to expend monies are made in the form of a motion at Town Meeting. The wording of the motions will specify the funding source; that is, the place from where money is going to come or will be raised. When a motion reads, "to appropriate a sum of money" without a source being identified, that amount will be included in the tax calculation, whereby the total of all sums to be appropriated will be reduced by an estimate of local and state revenue. The balance needed will be provided by property taxes. When items in the warrant are offset or raised from available funds, those items will also appear as offsets in the determination of the tax rate.

Levy Limit: The maximum amount a community can levy in any given year.

Local Receipts: This is the third largest source of revenue for the Town after property taxes and Cherry Sheet receipts. While it is comprised of a number of different items, the largest source is the auto excise tax.

New Growth: Proposition 2 ½ allows a community to increase its levy limit annually by an amount based upon the valuation of certain new construction and other growth in the tax base that is not the result of property revaluation. New growth becomes part of the levy limit and thus increases at the rate of 2.5% each year as the levy limit increases.

Override: An override is passed by a majority vote at Town Meeting and at the ballot. There are three types of overrides: An Operating Override, which permanently increases the levy limit; a Debt Exclusion, which increases the levy limit only for the life of the debt; and a Capital Project Override, which increases the levy only for the year in which the project is undertaken.

Proposition 2½: A Massachusetts General Law enacted in 1980 to limit property taxes.

Revolving Fund: Funds that may be used without appropriation and that are established for special uses. Recreation fees, for example, may be paid into a revolving fund. Revolving funds are established by state law or Town bylaw.

Reserve Fund: An amount appropriated by the Annual Town Meeting for emergency or unforeseen purposes. The Finance Committee, by state law, is the sole custodian of the Reserve Fund and approves transfers from the Fund into the operating budgets throughout the year if: (1) the need for funds is of an emergency and/or unforeseen nature, and (2) if, in the judgment of the Finance Committee, the Town Meeting would approve such an expenditure if such a meeting was held. The Reserve Fund is, therefore, a mechanism for avoiding the necessity of frequent Special Town Meetings.

Stabilization Fund: Similar to a "savings account", this account has been used to fund large capital projects such as fire trucks and school roofs. A recent amendment to state law allows the Stabilization Fund to be used for the operating budget, as well as capital purchases; however, the Finance Committee would generally be reluctant to recommend doing so. Placing money into this fund requires a majority vote of Town Meeting while withdrawing from the Stabilization Fund requires a 2/3 vote of Town Meeting.

APPENDIX I. BUDGET TERMS AND DEFINITIONS CONT'D

Tax Levy: The property tax levy is the revenue a community can raise through real and personal property taxes. In Massachusetts, municipal revenues to support local spending for schools, public safety, general government and other public services are raised through the property tax levy, state aid, local receipts and other sources. The property tax levy is the largest source of revenue for most cities and towns.

Town-wide Operating Expenses: This account in the general government section of the budget is comprised primarily of operating expenses such as postage, telephone and property liability insurance, that support town-wide operations and are not assigned to any one department or cost center.

**APPENDIX II. EMPLOYEE HEADCOUNT
(Full Time Equivalents)**

Cost Center	FY09 Actual	FY10 Budget	FY11 Non-Override	FY11 Override
LSRHS*	220.35	211.87	201.67	211.67
		-3.8%	-4.8%	-0.09%
Sudbury K-8 Schools *	389.89	393.31	381.81	391.81
		0.9%	-2.9%	-0.38%
Public Safety	79.25	76.97	76.97	80.97
Public Works	32.70	31.86	31.28	31.86
General Government	31.80	30.50	30.50	30.50
Human Services	7.20	6.20	6.20	6.40
Culture & Recreation	18.11	16.63	16.12	16.63
Town Operating Sub-total	169.06	162.16	161.07	166.36
		-4.1%	-0.7%	2.59%
Town Enterprises	9.60	9.60	10.18	9.60
		0.0%	6.0%	0.00%
TOTAL	788.90	776.94	754.73	779.44
% Change from Prior		-1.5%	-2.9%	0.32%

*Includes positions covered in full or in part by grants. LSRHS figures represent full FTE's; they are not prorated by the District's assessment to Sudbury.

APPENDIX III. FY09 EMPLOYEE COMPENSATION OVER \$100K

Lincoln Sudbury Regional High School			
Position	Salary	Other Compensation	Overtime
Superintendent/Principal	159,171	29,142	-
Director of Finance & Operations	126,794	-	-
Director of Students Services	111,018	4,259	-
Housemaster	111,018	4,259	-
Housemaster	111,018	4,259	-
Housemaster	111,018	4,259	-
Housemaster	111,018	4,259	-
Athletics/Activities Director	111,018	4,259	-
Coord. of Curric & Instruction ¹ Sys	105,673	4,259	-
Librarian	94,502	48,751	-
Department Coordinator	94,502	7,000	-
Department Coordinator	94,502	6,000	-
Counselor	89,077	48,039	-
Teacher	83,077	51,579	-
Sudbury Public Schools			
Position	Salary	Other Compensation	Overtime
Superintendent	152,760	22,750	-
Assistant Superintendent	115,045	1,000	-
Special Education Administrator	104,710	-	-
Director of Business & Finance	104,587	1,000	-
Principal, Noyes	104,058	2,722	-
Principal, Nixon	101,764	-	-
Principal, Curtis	98,440	5,350	-
Principal, Loring	97,000	4,300	-
Town			
Position	Salary	Other Compensation	Overtime
Town Manager	134,377	24,084	-
DPW Director/Town Engineer	103,857	10,665	-
Fire Chief	98,033	26,838	-
Police Lieutenant	87,598	24,333	-
Police Lieutenant	81,471	28,999	6,242
Police Chief (retired 3/2009)	71,228	67,135	-
Fightfighter/Emt	64,728	13,495	41,301
Fire Captain/Emt	64,728	12,946	34,058
Fire Captain/Emt	63,578	9,874	34,730
Fightfighter/Emt	49,588	4,722	56,314

¹Salaries are base pay.

²Other compensation paid to employees. This amount may include annuities, deferred compensation match, career incentive, merit pay, stipends, regular or retirement sick-buyback, or any other compensation paid by the Town or Schools, other than base salary or overtime.

APPENDIX IV. COLLECTIVE BARGAINING

BARGAINING UNIT AND CONTRACT TERMS

LINCOLN-SUDBURY REGIONAL HIGH SCHOOL

Three-year contract covering school years 2009/10, 2010/11, 2011/12. Effective dates and percentage increases are: 9/1/2009 – Teachers, 0.75% for salary Schedule A, additional 0.75% for the top step in all classifications; 9/1/2010 – 1.75% for salary Schedule A, additional 1.0% for the top step in all classifications; 9/1/2011 – 2.0% for salary Schedule A, additional 1.0% for the top step in all classifications.

SUDBURY PUBLIC SCHOOLS, K-8

Three-year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are:
7/1/2009 – Teachers, 3.0% to the salary schedule; 7/1/2010 – 0% to salary schedule, and 2.5% on a new top step in all classifications; 7/1/2011 – 1.0% to salary schedule and 1.0% to the top step.

TOWN

FIRE

Three-year contract covering fiscal years 2010, 2010, 2012, is being negotiated at the time of warrant preparation.

POLICE

Three-year contract covering fiscal years 2010, 2011, 2012. Effective dates and percentage increases are:
11/1/2009 – 3.00%; 7/1/2010 – 0% to salary schedule, 2.5% on a new top step; 7/1/2011 – 0%.

PUBLIC WORKS

Three-year contract covering fiscal years 2008, 2009, 2010. Effective dates and percentage increases are:
7/1/2007 – 2.00%; 7/1/2008 – 3.00%; 7/1/2009 – 2.50%, 1/1/10 – 1.50%.

ENGINEERING

Three-year contract covering fiscal years 2008, 2009, 2010. Effective dates and percentage increases are:
7/1/2007 – 2.00% ; 7/1/2008 – 3.00%; 7/1/2009 – 2.50%, 1/1/2010 – 1.50%.

SUPERVISORY

Three-year contract covering fiscal years 2010, 2011, 2012 awaits final ratification at the time of warrant preparation.

CIVILIAN DISPATCHERS

Three-year contract covering fiscal years 2010, 2011, 2012, is being negotiated at the time of warrant preparation.

NOTE: Percentage increases are for cost of living only and do not include changes for step, longevity or merit increases.

APPENDIX V. SALARY SCHEDULES & CLASSIFICATION PLANS

SUDBURY PUBLIC SCHOOLS							
TEACHER SALARY SCHEDULE							
FY10: 7/1/09 - 6/30/10							
Bachelors		Masters		Masters +30		Masters +60	
Step	Salary	Step	Salary	Step	Salary	Step	Salary
1	40,468	1	43,307	1	45,797	1	47,982
2	42,152	2	45,109	2	47,702	2	49,978
3	43,905	3	46,986	3	49,686	3	52,057
4	45,731	4	48,940	4	51,753	4	54,223
5	47,633	5	50,976	5	53,906	5	56,478
6	49,615	6	53,097	6	56,149	6	58,828
7	51,679	7	55,306	7	58,485	7	61,275
8	53,829	8	57,606	8	60,918	8	63,824
9	56,068	9	60,003	9	63,452	9	66,479
10	58,401	10	62,499	10	66,091	10	69,245
11	60,830	11	65,098	11	68,841	11	72,125
12	63,360	12	67,807	12	71,704	12	75,126
13	65,996	13	70,628	13	74,687	13	78,250
14	68,742	14	73,566	14	77,795	14	81,506
15	71,601	15	76,626	15	81,031	15	84,897
16		16	80,457	16	85,082	16	89,141

SUDBURY PUBLIC SCHOOLS							
SUPPORT STAFF SALARY SCHEDULE							
FY10: 7/1/09 - 6/30/10							
Level	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
1	10.51	10.88	11.37	11.78	12.27	12.73	13.62
2	10.81	11.27	11.72	12.22	13.23	15.25	16.10
3	13.60	14.13	14.68	15.25	15.86	16.49	17.64
4	14.68	15.25	15.86	16.49	17.13	17.79	19.04
5	15.86	16.49	17.13	17.79	18.50	19.21	20.56
6	17.13	17.79	18.50	19.21	19.97	20.75	22.20
7	18.50	19.21	19.97	20.75	21.59	22.41	23.99
8	19.97	20.75	21.56	22.41	23.31	24.21	25.90
9	21.56	22.44	23.30	24.20	25.15	26.16	27.97

JOB CLASSIFICATION FOR SUPPORT STAFF							
Level 1	n/a						
Level 2	Cafeteria Helper						
Level 3	Cafeteria Cook						
Level 4	Lunchroom Supervisor						
Level 5	Cafeteria/Manager, Early Childhood Asst (Clerical), Secretarial Asst						
Level 6	Business Office Assistant, School Secretary/Student Services Secretary						
Level 7	Library/Media Paraprofessional, Teacher Assistan						
Level 8	School Administrative Secretary, Assistant Librarian						
Level 9	Administrative Secretary, Tutor, ABA Tutor, METCO Tutor						

SUDBURY PUBLIC SCHOOLS			
NURSES' SALARY SCHEDULE 2009-2010			
	Step	Salary	
	1	41,484	
	2	43,974	
	3	46,612	
	4	49,409	
	5	52,373	

CUSTODIAN SALARY SCHEDULE 2009-2010				
Level	Custodian	MA-1	MA-2	
1	16.44	20.10	25.45	
2	17.10	20.83	26.41	
3	17.77	21.59	27.37	
4	18.42	22.41	28.40	
5	19.10	23.25	29.48	
6	19.87	24.10	30.57	
7	21.07	25.00	31.73	
8	21.89			
9	22.68			
10	22.89			
11	23.26			
MA-1 is Maintenance Assistant 1				
MA-2 is Maintenance Assistant 2				

APPENDIX V.

LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT

FY11 TEACHERS' SALARY SCHEDULE						
Step	B	M	M+15	M+30	M+45	M+60
1	42,510	45,912	47,289	48,707	50,169	51,674
2	44,211	47,748	49,181	50,656	52,175	53,740
3	45,979	49,657	51,148	52,681	54,262	55,890
4	47,818	51,644	53,193	54,789	56,432	58,126
5	49,731	53,710	55,321	56,981	58,690	60,451
6	51,721	55,858	57,534	59,260	61,038	62,869
7	53,790	58,092	59,836	61,631	63,479	65,384
8	55,941	60,416	62,229	64,095	66,018	67,999
9	58,178	62,833	64,718	66,659	68,659	70,719
10	60,506	65,346	67,307	69,326	71,406	73,548
11	62,926	67,960	69,999	72,099	74,262	76,490
12	65,443	70,679	72,799	74,983	77,232	79,549
13	68,061	73,506	75,711	77,982	80,322	82,731
14	70,783	76,446	78,739	81,101	83,535	86,040
15	73,615	79,504	81,889	84,346	86,876	89,483
16	77,138	82,684	85,165	87,719	90,351	93,061
17	77,138	86,642	87,508	92,900	95,687	98,557

NURSES' SCHEDULE		
Step	B	M + Cert.
1	37,447	38,570
2	38,945	40,113
3	40,502	41,718
4	42,123	43,386
5	43,807	45,122
6	45,560	46,927
7	47,382	48,804
8	50,132	51,636

APPENDIX V.

**LINCOLN SUDBURY REGIONAL SCHOOL DISTRICT-SUPPORT STAFF
COMPENSATION CLASSIFICATION PLAN**

FY11 SUPPORT STAFF SCHEDULES								
Category A	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale 1	10.73	11.12	11.52	12.00	12.45	12.94		
Scale 2	12.04	12.51	13.07	13.54	14.03	14.60		
Scale 3	13.45	13.88	14.44	15.00	15.50	16.12		
Scale 4	14.73	15.29	15.95	16.48	17.09	17.77		
Scale 5	16.09	16.73	17.37	18.02	18.66	19.40		
Scale 6	17.41	18.13	18.81	19.49	20.17	20.98		
Scale 7	18.79	19.49	20.26	21.00	21.76	22.63		
Scale 8	20.06	20.92	21.68	22.51	23.32	24.25		
Scale 9	21.47	22.29	23.12	23.99	24.88	25.88		
Scale 10	22.75	23.65	24.60	25.53	26.42	27.47	28.57	29.72
Category B	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale 1	20.26	21.02	21.91	22.75	23.68	24.60	25.60	26.62
Scale 2	22.05	22.90	23.82	24.75	25.77	26.81	27.91	29.03
Scale 3	23.84	24.77	25.73	26.81	27.87	28.99	30.14	31.34
Tech	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale	51,994	54,074	56,237	58,487	60,826	63,259	65,791	67,913
Trainer	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8
Scale	36,851	38,372	39,971	41,650	43,487	45,245	47,057	48,939
Trainer Cont'd	Step 9	Step 10	Step 11	Step 12	Step 13	Step 14	Step 15	Step 16
Scale	50,897	52,932	55,047	57,251	59,542	61,923	64,399	66,975

**APPENDIX V.
FY11 TOWN NON-UNION EMPLOYEES***

Position	Grade	Step 1	Step 2	Step 3	Step 4	Step 5	Step 5	Step 7
		Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly	Yrly/Hrly
Director of Public Works	16	88,364	91,825	95,419	99,156	103,039	107,073	109,750
Finance Director		48.37	50.26	52.23	54.27	56.40	58.61	60.07
Fire Chief								
Police Chief								
Assist. Town Mgr./Human Res. Dir.	15	81,074	84,251	87,549	90,977	94,539	98,241	100,698
Dir. of Planning & Community Dev.		44.38	46.11	47.92	49.80	51.75	53.77	55.12
Town Accountant	14	74,391	77,302	80,329	83,472	86,742	90,138	92,392
		40.72	42.31	43.97	45.69	47.48	49.34	50.57
Mgmt. Analyst, D.P.W.	12	62,632	65,083	67,630	70,277	73,028	75,887	77,784
		34.28	35.62	37.02	38.47	39.97	41.54	42.57
Community Housing Specialist	11	57,465	59,715	62,050	64,481	67,004	69,625	71,366
Community Social Worker		31.45	32.68	33.96	35.29	36.67	38.11	39.06
Aquatic Facility Director	10	52,729	54,792	56,936	59,163	61,479	63,886	65,483
Assistant Building Inspector		28.86	29.99	31.16	32.38	33.65	34.97	35.84
Exec. Ass't to Town Mgr. (40 hrs/wk)								
Adult Services/Reference Librarian	9	48,383	50,276	52,244	54,287	56,411	58,618	60,084
Assistant Library Director		26.48	27.52	28.60	29.71	30.88	32.08	32.89
Assistant Town Accountant								
Assistant Assessor	8	44,397	46,133	47,938	49,811	51,761	53,787	55,131
Assistant Planner		24.30	25.25	26.24	27.26	28.33	29.44	30.18
Assistant Treasurer/Collector								
Children's Librarian								
Head of Circulation, Library								
Head of Technical Services, Library								
Selectmen's Office Mgr. (40 hrs/wk)								
Tech. Support Specialist (40 hrs/wk)								
Aquatic Supervisor	7	40,734	42,327	43,985	45,706	47,496	49,354	50,587
Assistant Children's Librarian		22.30	23.17	24.08	25.02	26.00	27.01	27.69
Assistant Town Clerk								
Benefits Coordinator/Hum. Res. Ass't								
Office Supervisor								
Accounting Assistant/Payroll	6	37,725	39,200	40,734	42,327	43,985	45,706	46,849
Admin. Assistant, Park & Rec.		20.65	21.46	22.30	23.17	24.08	25.02	25.64
Board of Health/Conservation Ass't								
Data Collector								
Library Office Coordinator								
Program Coordinator, Park & Recr.								
Reference Librarian								
Secretary/Legal Secretary								
Young Adult/Reference Librarian								
Youth Coordinator								
Acct. Administrative Ass't-DPW	5	34,937	36,303	37,725	39,200	40,734	42,327	43,385
Accounting Ass't/Accounts Payable		19.12	19.87	20.65	21.46	22.30	23.17	23.75
Board of Health Coordinator								
Census Administrator								
Department Assistant								
Vital Records Administrator								
Accounting Clerk	4	32,358	33,621	34,937	36,303	37,725	39,200	40,180
Assessing Analyst		17.71	18.40	19.12	19.87	20.65	21.46	21.99
Bldg. Maint. Custodian (40 hrs/wk)								
Library Technician								
Van Driver, Senior Center								
Library Clerk	3	29,968	31,138	32,358	33,621	34,937	36,303	37,211
Recording Secretary		16.40	17.04	17.71	18.40	19.12	19.87	20.37
Clerk I	2	27,758	28,841	29,968	31,138	32,358	33,621	34,462
		15.19	15.79	16.40	17.04	17.71	18.40	18.86
Head Lifeguard	1	25,709	26,713	27,758	28,841	29,968	31,138	31,916
		14.07	14.62	15.19	15.79	16.40	17.04	17.47

*All positions listed above are 35 hours per week unless otherwise noted. Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 35 hours per week.

APPENDIX V.

FY11 TOWN NON-UNION INDIVIDUALLY RATED EMPLOYEES

<u>LIBRARY</u>				<u>Minimum</u>	<u>Step 1</u>	<u>Step 2</u>	
Library Page				8.54	8.91	9.23	
<u>HIGHWAY/PARK AND RECREATION</u>							
Temporary Laborer					9.19 - 11.22		
Temporary Snow Removal Equipment Operator					11.06 - 13.85		
<u>DEPARTMENTAL TEMPORARY OR SEASONAL HELP</u>							
Temporary or Seasonal Help					9.19 - 11.22		
Temporary Special Project Help					13.66 - 17.21		
<u>TECHNOLOGY DEPT. TEMPORARY OR SEASONAL HELP</u>				<u>Level I</u>	<u>Level II</u>	<u>Level III</u>	
				9.19 - 11.22	14.14 - 17.81	17.81 - 22.44	
<u>PARK AND RECREATION</u>							
<u>Part-time or seasonal hourly rated salary range (Salary paid from program fees)</u>							
<u>Position</u>	<u>1</u>	<u>2</u>	<u>3</u>				
Preschool Instructor	11.00	11.50	12.00				
Recreation Staff	8.00 - 15.00						
Teen Center Staff	8.00 - 19.00						
<u>Seasonal Camp Staff</u>							
<u>Position</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>	<u>7</u>
Camp Director	19.00	20.00	21.00	22.00	23.00	24.00	25.00
Assistant Camp Director	12.00	13.00	14.00	15.00			
Program Specialist	10.00	10.50	11.00	12.00			
Counselor	9.00	9.50	10.00	11.00			
Preschool Camp Director	17.00	18.00	19.00	20.00			
Preschool Counselor	8.00	8.50	9.00	10.00			
<u>ATKINSON POOL</u>							
Lifeguard	8.75 - 10.75						
Lifeguard in Training	8.00						
Water Safety Instructor	9.25 - 20.00						
Swim Aide in Training	8.00						
Supervisor (Shift-PT)	10.25 - 11.75						
Pool Receptionist	8.00 - 10.50						
<u>ATKINSON POOL (Specialty Instruction)</u>							
Diving (Certified)	20.00	22.00	24.00	26.00	Non-certified: 10.00*		
Water Exercise (Certified)	17.00	19.00	21.00	23.00	25.00	27.00	
* Non-certified instructors are required to become certified within one year.							
<u>MISCELLANEOUS SINGLE RATED</u>							
Election Warden and Election Cle	8.08						
Deputy Election Warden/Clerk	8.08						
Election Officer & Teller	7.69						
C.O.A. Info. & Referral Specialist	24.40						

APPENDIX V.

FY 11 TOWN UNION EMPLOYEES

POLICE DEPARTMENT						
	MIN	Step 1	Step 2	Step 3	Step 4	MAX
Patrolman						
Annual	46,660	47,737	48,859	49,956	50,949	52,223
Hourly	23.22	23.75	24.31	24.86	25.35	25.99
Sargeant						
Annual	55,985	57,280	58,618	59,939	61,132	62,660
Hourly	27.86	28.50	29.17	29.82	30.42	31.18
Single Rated:						
Crime Prevention Officer	\$925/Year		Parking Clerk	\$925/Year		
Photo/Fingerprint Officer	\$925/Year		Mechanic	\$925/Year		
Juvenile Officer	\$925/Year		Firearms Officer	\$925/Year		
Safety Officer	\$925/Year		DARE Officer	\$925/Year		
Motorcycle Officer (half-time)	\$462.50/Yr		Fleet Maint. Officer	\$925/Year		
Detective	\$1,900/Yr		Traffic Officer	\$925/Year		
Training Officer	\$925/Year					

Notes:

Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 38.5 hours per week.

Overtime pay is calculated by multiplying 1.5 times these hourly rates.

APPENDIX V.

FY10 TOWN UNION EMPLOYEES*

DEPARTMENT OF PUBLIC WORKS							
	<u>START</u>	<u>STEP 1</u>	<u>STEP 2</u>	<u>STEP 3</u>	<u>STEP 4</u>	<u>STEP 5</u>	<u>STEP 6</u>
Foreman, Landfill	46,334	47,724	49,158	50,630	52,149	53,716	55,595
Foreman, Highway	46,334	47,724	49,158	50,630	52,149	53,716	55,595
Foreman, Tree & Cemetery	46,334	47,724	49,158	50,630	52,149	53,716	55,595
Foreman, Park & Grounds	46,334	47,724	49,158	50,630	52,149	53,716	55,595
Master Mechanic	21.46	22.18	22.84	23.45	24.04	24.66	25.51
Assistant Mechanic	20.5	21.21	21.89	22.5	23.07	23.71	24.54
Heavy Equipment Operator	19.25	19.81	20.26	20.92	21.59	22.28	23.05
Tree Surgeon	19.25	19.81	20.26	20.92	21.59	22.28	23.05
Truck or Light Equip. Operator	18.11	18.56	19.09	19.45	19.84	20.25	20.94
Tree Climber	18.11	18.56	19.09	19.45	19.84	20.25	20.94
Heavy Laborer	17.06	17.54	17.92	18.41	18.89	19.39	20.08
Light Laborer	15.58	16	16.34	16.78	17.19	17.64	18.26
Landfill Monitor	14.56						
Notes: Crew Leaders receive an annual stipend of \$4,095.							
Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 40 hours per week.							
Overtime pay is calculated by multiplying 1.5 times these hourly rates.							

ENGINEERING DEPARTMENT							
	<u>STEP 1</u>	<u>STEP 2</u>	<u>STEP 3</u>	<u>STEP 4</u>	<u>STEP 5</u>	<u>STEP 6</u>	<u>STEP 7</u>
E1 Engineering Aide I	31,912	32,871	33,861	34,880	35,925	37,006	38,116
E2 Engineering Aide II	36,699	37,802	38,933	40,108	41,307	42,548	43,825
E3 Engineering Aide III	42,205	43,473	44,774	46,118	47,502	48,926	50,394
E4 Jr. Civil Engineer	48,536	49,990	51,488	53,035	54,626	56,263	57,951
E5 Civil Engineer	54,605	56,239	57,934	59,671	61,459	63,300	65,200
E6 Sr. Civil Engineer	57,905	59,642	61,432	63,276	65,175	67,124	69,138
E7 Assistant Town Engineer	68,108	70,149	72,252	74,418	76,654	78,953	81,322
Notes: Hourly rates are obtained by dividing the annual rates by 52.2 weeks and 40 hours per week. Overtime pay is calculated by multiplying 1.5 times these hourly rates.							

*Three-year contracts covering fiscal years 2011, 2012, 2013 are being negotiated at the time of warrant preparation.

APPENDIX V.

FY09 UNION EMPLOYEES*

FIRE DEPARTMENT	MIN	Step 1	Step 2	Step 3	MAX
Firefighter					
Annual	43,702	44,717	45,752	46,763	47,864
Hourly	19.93	20.40	20.87	21.33	21.83
Firefighter/EMT					
Annual	45,794	46,809	47,844	48,857	49,957
Hourly	20.89	21.35	21.82	22.28	22.79
Lieutenant					
Annual	49,930	51,089	52,272	53,427	54,685
Hourly	22.77	23.30	23.84	24.37	24.94
Lieutenant/EMT					
Annual	52,320	53,479	54,662	55,819	57,076
Hourly	23.86	24.39	24.93	25.46	26.03
Fire Captain					
Annual	57,045	58,369	59,721	61,040	62,478
Hourly	26.02	26.62	27.24	27.84	28.50
Fire Captain/EMT					
Annual	59,776	61,100	62,451	63,773	65,209
Hourly	27.27	27.87	28.49	29.09	29.74
Single Rated:					
Call Firefighter		\$250 annual stipend and Step 1 Firefighter hourly rate above			
Fire Prevention Officer		\$800 /year			
Fire Alarm Superintendent		\$800 /year			
Master Mechanic		\$800 /year			
Technology Coordinator		\$800 /year			
Fire Department Training Officer		\$800 /year			
Emergency Medical Tech. Coord.		\$800 /year			
Fire Alarm Foreman		\$800 /year			

*Three-year contract covering fiscal years 2010, 2011, 2012 is being negotiated at the time of warrant preparation.

APPENDIX V.

FY09 UNION EMPLOYEES CONT'D*

SUPERVISORY UNION							
Level/Position*	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7
SA-1	49,121	51,046	53,046	55,127	57,288	59,534	61,868
Supv. Of Buildings ¹							
SA-2	53,548	55,644	57,827	60,095	62,450	64,897	67,441
Town Clerk ²							
Conservation Coord.							
SA-3	58,364	60,650	63,029	65,499	68,066	70,735	73,508
Hwy. Operations Dir.							
C.O.A. Director							
SA-4	63,614	66,108	68,700	71,392	74,191	77,098	80,121
Health Director	66,560	68,557	70,614	72,734	74,914	77,163	80,188
Building Inspector							
Director of Assessing	67,094	69,106	71,179	73,314	75,514	77,779	80,828
Treasurer/Collector							
Pk. And Rec. Director							
Town Planner							
Technology Admin.	67,094	69,106	71,179	73,314	75,514	77,779	80,828
SA-5	69,341	72,060	74,884	77,818	80,871	84,041	87,335
Police Lieutenant							
Assistant Fire Chief							
Library Director							
SA-6	75,581	78,546	81,623	84,822	88,149	91,604	95,195
Town Engineer							
SA-7	82,404	85,633	88,989	92,480	96,104	99,872	103,786
* Note all positions in each level have same step compensation unless otherwise indicated.							
¹ This position also receives an annual stipend \$13,050 as Wiring Inspector							
² This position also receives an annual stipend of \$782 as Registrar of Voters							

*Three-year contract covering fiscal years 2010, 2011, 2012 is awaiting final ratification at the time of warrant preparation.

VOLUNTEER TO SERVE YOUR TOWN!

Following the conclusion of the Annual Town Meeting, the term of many people who currently serve on various boards and committees will expire. The Moderator and the Board of Selectmen will be looking for people to fill those vacancies or those which may occur in the future. If you would like to serve on a Town committee, complete the form below and send to: Board of Selectmen, 278 Old Sudbury Road, Sudbury, MA 01776. We will send you an application form to complete and mail back OR you may access the application form on the Town's website: www.sudbury.ma.us.

NAME: _____ PHONE: _____

ADDRESS: _____

EMAIL: _____

INDICATE INTERESTS BELOW:

- | | | |
|---|--|--|
| <input type="checkbox"/> Agriculture | <input type="checkbox"/> Disabilities Commiss. | <input type="checkbox"/> Memorial Day |
| <input type="checkbox"/> Board of Appeals | <input type="checkbox"/> Education | <input type="checkbox"/> Parks and Recreation |
| <input type="checkbox"/> Capital Planning | <input type="checkbox"/> Election Officers | <input type="checkbox"/> Ponds and Waterways |
| <input type="checkbox"/> CERT* | <input type="checkbox"/> Energy/Green Ribbon | <input type="checkbox"/> Sewer Assessment |
| <input type="checkbox"/> Community Preservation | <input type="checkbox"/> Finance | <input type="checkbox"/> Sudbury Day Festival |
| <input type="checkbox"/> Conservation | <input type="checkbox"/> Historic Districts | <input type="checkbox"/> Sudbury Housing Trust |
| <input type="checkbox"/> Council on Aging | <input type="checkbox"/> Historical Commission | <input type="checkbox"/> Town Report |
| <input type="checkbox"/> Cultural Council | <input type="checkbox"/> Library | <input type="checkbox"/> Veterans Advisory |
| <input type="checkbox"/> Design Review Board | <input type="checkbox"/> Medical Reserve Corps | <input type="checkbox"/> Youth Commission |

* Community Emergency Response Team

Refer to the Town's website to review the Mission Statement and/or additional information on any of these boards and committees.

SUDBURY SPRING CLEANUP DAY!

SATURDAY, APRIL 24, 2010

**In celebration of Sudbury Earth Week,
please join Sudbury residents in our
Annual Roadside Cleanup
and general beautification of
business districts, public areas and parks.**

ADOPT A STREET SIGN-UP FORM

For Annual Roadside Cleanup

Saturday, April 24, 2010

Please complete the following form and contact us by phone or email. If your preference is available, you will be assigned that area. If not, you will be contacted with an alternative location.

The Roadside Cleanup is organized by the Board of Selectmen as part of the Town's Earth Week activities. Plastic bags and safety signs to put on cars may be picked up at Town Hall from 9:00 a.m. to Noon on April 24. Bags may be left along roadsides for the Department of Public Works to pick up. **Your help is needed! Please join us.**

(PLEASE PRINT)

Name: _____

Address: _____

Phone: _____ Email: _____

Preferred street/area assignment: _____

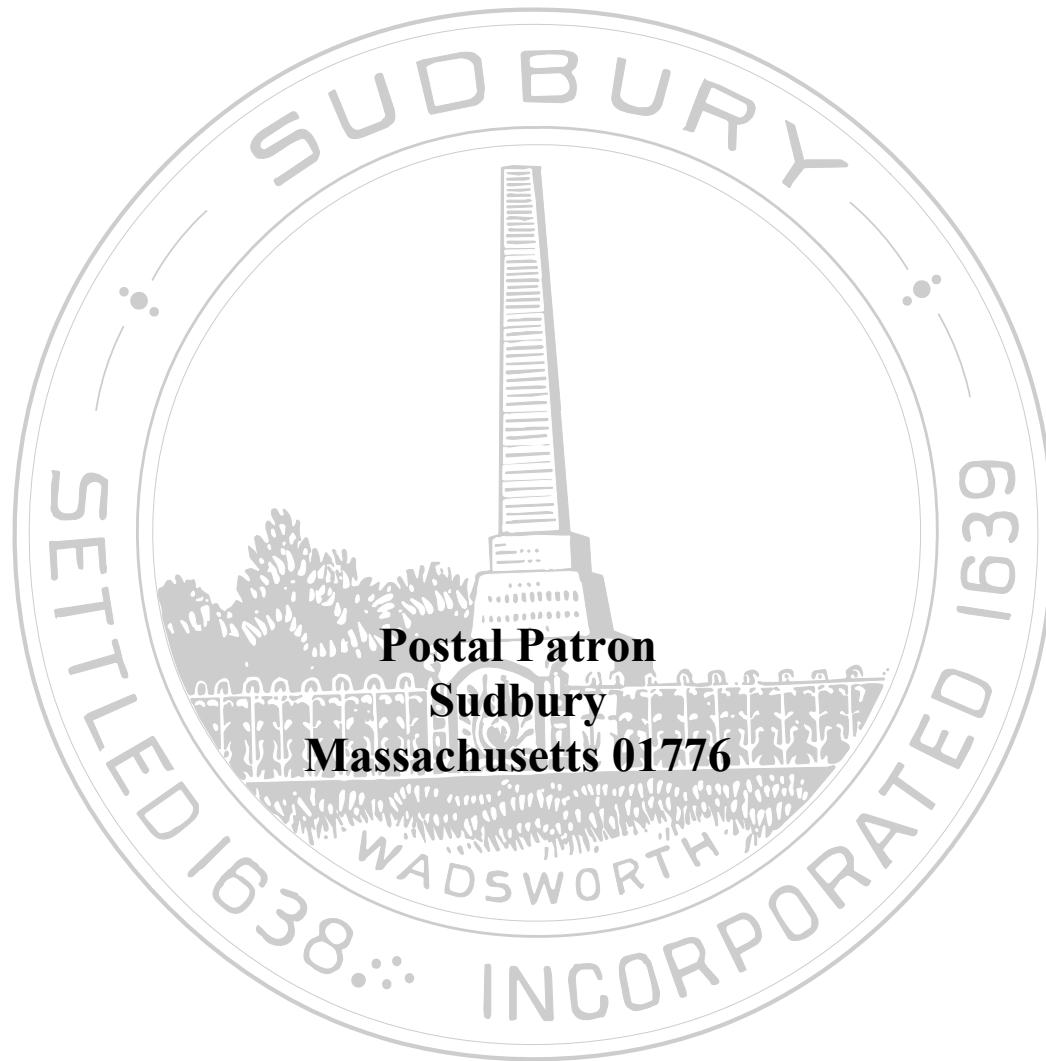
Please contact the Selectmen's Office, 278 Old Sudbury Road by April 16,
or email glaserd@sudbury.ma.us or call 978-639-3381.

NOTES

NOTES

**Board of Selectmen
Sudbury, MA 01776**

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