



**TOWN OF BELMONT**  
TOWN CLERK'S OFFICE  
455 CONCORD AVENUE  
BELMONT, MASSACHUSETTS 02478

ELLEN O'BRIEN CUSHMAN  
TOWN CLERK

TEL. (617) 993-2600  
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May 2, 2011

Town Meeting Members;

Attached you will find a packet of information that relates to the Article 20 and the financial articles for the Annual Town Meeting as well as the motions for the Special Town Meeting, both of which are scheduled to **resume May 9, 2011 at Belmont High School Auditorium at 7 p.m.**

- Article 20 – Stretch Energy Code:
  - Handout to accompany the main motion under Article 20 – Revised text of General Bylaw Amendment (Article 32 )
  - I: Original Warrant Article
  - J: Red-line document showing changes made by the Bylaw Review Committee.
  
- Motions:
  - Financial Articles of Annual Town Meeting
  - Article 11 (including Amendment offered by Library Trustees) 13,14,15
  - Special Town Meeting, May 9, 2011 at 7 pm
  
- Town of Belmont Expenditures – FY2012 Proposed Budgets
- Warrant Committee Report – Town of Belmont FY2012 Budget
- Belmont Public Schools – Fiscal Year 2012 Budget

Ellen O'Brien Cushman  
Town Clerk

**ARTICLE 20: Adoption of the Stretch Energy Code****Article 32****STRETCH ENERGY CODE****32.1 Definitions**

**International Energy Conservation Code (IECC) 2009** – The International Energy Conservation Code (IECC) is a building energy code created by the International Code Council. It is a model code adopted by many state and municipal governments in the United States for the establishment of minimum design and construction requirements for energy and is updated on a three year cycle. Since July 1, 2010, the baseline energy conservation requirements of the MA State Building Code defaulted to the latest published edition, the IECC 2009 with Massachusetts amendments as approved by the Board of Building Regulations and Standards.

**Stretch Energy Code** – Codified by the Board of Building Regulations and Standards as 780 CMR Appendix 115.AA of the 8<sup>th</sup> edition Massachusetts building code, the Stretch Energy Code is an appendix to the Massachusetts building code, based on further amendments to the International Energy Conservation Code (IECC) to improve the energy efficiency of buildings built to this code.

**32.2 Purpose**

The purpose of 780 CMR 115.AA is to provide a more energy efficient alternative to the base energy code applicable to the relevant sections of the building code for both new construction and existing buildings.

**32.3 Applicability**

The Stretch Energy Code applies to residential and commercial buildings. Buildings not included in this scope shall comply with 780 CMR 13, 34, 61, or 93, as applicable.

**32.4 Authority**

A municipality seeking to ensure that construction within its boundaries is designed and built above the energy efficiency requirements of 780 CMR may mandate adherence to this appendix.

780 CMR 120 AA may be adopted or rescinded by any municipality in the commonwealth in the manner prescribed by law.

**32.5 Incorporation and Enforcement**

The Stretch Energy Code, as codified by the Board of Building Regulations and Standards as 780 CMR Appendix 115.AA, including any future editions, amendments or modifications, is herein incorporated by reference into this Article.

The Stretch Energy Code is enforceable by the Inspector of Buildings.”

**ARTICLE 20 Adoption of the Stretch Energy Code**

*To see if the Town will vote to enact Chapter 32 of the Town of Belmont General Bylaws, entitled "Stretch Energy Code," for the purpose of regulating the design and construction of buildings for the effective use of energy, pursuant to Appendix 120 AA of the Massachusetts Building Code, 780 CMR, the "Stretch Energy Code", including amendments or modifications thereto, a copy of which is on file with the Town Clerk, or in any way act thereon.*

**Chapter 32  
STRETCH ENERGY CODE****32.1 Definitions****32.2 Purpose****32.3 Applicability****32.4 Authority****32.5 Stretch Code****32.1 Definitions**

**International Energy Conservation Code (IECC) 2009** - The International Energy Conservation Code (IECC) is a building code created by the International Code Council. It is a model code adopted by many state and municipal governments in the United States for the establishment of minimum design and construction requirements for energy efficiency. Commencing July 1, 2010, the baseline energy conservation requirements of the MA State Building Code will default to IECC 2009 and MA amendments.

**Stretch Energy Code** - Codified by the Board of Building Regulations and Standards as 780 CMR Appendix 115.AA, the Stretch Energy Code is the International Energy Conservation Code (IECC) 2009 with amendments contained herein.

**32.2 Purpose**

The purpose of 780 CMR 120.AA is to provide a more energy efficient alternative to the base energy code applicable to the relevant sections of the building code for both new construction and existing buildings.

**32-3 Applicability**

This code applies to residential and commercial buildings. Buildings not included in this scope shall comply with 780 CMR 13, 34, 61, or 93, as applicable.

**32-4 Authority**

A municipality seeking to ensure that construction within its boundaries is designed and built above the energy efficiency requirements of 780 CMR may mandate adherence to this appendix.

780 CMR 120 AA may be adopted or rescinded by any municipality in the commonwealth in the manner prescribed by law.

**32-5 Stretch Code**

The Stretch Code, as codified by the Board of Building Regulations and Standards as 780 CMR Appendix 120 AA, including any amendments or modifications, is herein incorporated by reference into the Town of Belmont General Bylaws, Chapter 32.

The Stretch Code is enforceable by the inspector of buildings.

Majority vote required for passage                      Yes \_\_\_\_\_ No \_\_\_\_\_

The Warrant Committee and the By-Law Review Committee will report orally on this Article.

ARTICLE 20: Adoption of the Stretch Energy Code

Article 32

STRETCH ENERGY CODE

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32.1 Definitions

International Energy Conservation Code (IECC) 2009 – The International Energy Conservation Code (IECC) is a building energy code created by the International Code Council. It is a model code adopted by many state and municipal governments in the United States for the establishment of minimum design and construction requirements for energy and is updated on a three year cycle. Since July 1, 2010, the baseline energy conservation requirements of the MA State Building Code defaulted to the latest published edition, the IECC 2009 with Massachusetts amendments as approved by the Board of Building Regulations and Standards.

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The purpose of 780 CMR 115,AA is to provide a more energy efficient alternative to the base energy code applicable to the relevant sections of the building code for both new construction and existing buildings.

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32.4 Authority

A municipality seeking to ensure that construction within its boundaries is designed and built above the energy efficiency requirements of 780 CMR may mandate adherence to this appendix.

780 CMR 120 AA may be adopted or rescinded by any municipality in the commonwealth in the manner prescribed by law.

32.5 Incorporation and Enforcement

The Stretch Energy Code, as codified by the Board of Building Regulations and Standards as 780 CMR Appendix 115,AA, including any future editions, amendments or modifications, is herein incorporated by reference into this Article.

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The Stretch Energy Code is enforceable by the Inspector of Buildings."

ANNUAL TOWN MEETING

MAY 9, 2011

Motions Under the Warrant Articles

ARTICLE 3

MOVED: That the sum of \$3,129,023.67 is to be transferred as follows in order to meet said expenses for the Town of Belmont which were appropriated under Article 6 of the Annual Town Meeting on April 25, 2011, and Articles 4, 5, 7, and 9 of the Annual Town Meeting on May 9 and May 11, 2011.

\$125,000 from fund balance in Abatement and Exemption Surplus Account to Assessors Services and to Insurance

\$2,000,000 from Unreserved Fund Balance (formerly referred to as Free Cash) to Retirement and Insurance

\$60,000 from Fund Balance in Parking Meters to Police Traffic Management

\$59,559.22 Premium on Sale of Bonds to offset Property Tax Debt Exclusion

\$167,464.45 from various leftover capital expenditures, as detailed in a document entitled "Completed Capital Projects" and mailed to each Town Meeting Member, to help offset capital purchases in FY12

\$67,000 from Belmont Municipal Light Department to fund assigned IT personnel

\$650,000 from Belmont Municipal Light Department to offset the tax rate

In addition, that the entire revenue derived from the sale of electricity to private customers, municipal departments, including the cost of street lighting and from jobbing during the twelve months beginning January 1, 2012, be allocated and appropriated for the operating expenses of the Municipal Light Department including out-of-state travel, all said appropriations and payments to be expended under the direction of the Municipal Light Board and that the Town Accountant is hereby authorized to make such transfers on the books of the Town.

*This motion requires a two-thirds vote.*

#### ARTICLE 4

- MOVED: That under General Government, the sum of \$185,586 having already been appropriated under special warrant articles, the sum of \$3,605,616 is appropriated, to be raised by General Tax. Said amount includes \$157,873 of water indirect costs that will be funded from water receipts and \$125,000 of sewer indirect costs that will be funded from sewer receipts.
- MOVED: That under Employee/Retiree Benefits, the sum of \$5,070,588 having already been appropriated under special warrant articles, the sum of \$1,893,210 is appropriated, to be raised by General Tax
- MOVED: That under Public Safety the sum of \$11,559,611 is appropriated to be raised by General Tax;
- MOVED: That under Belmont Public Schools the sum of \$41,575,783 is appropriated, to be raised by General Tax;
- MOVED: That under Minuteman Regional School the sum of \$888,119 is appropriated, to be raised by General Tax.
- MOVED: That under Public Services the sum of \$532,410, having already been appropriated under a special warrant article for Chapter 90, and the sum of \$7,585,485 having already been appropriated under a special article for Sewer Enterprise, and the sum of \$4,887,576 having already been appropriated under a special article for Water Enterprise, the sum of \$8,289,754 be appropriated, to be raised by General Tax; provided,
- MOVED: That under Human Services the sum of \$760,729 is appropriated, to be raised by General Tax.
- MOVED: That under Culture and Recreation the sum of \$2,555,194 is appropriated, to be raised by General Tax;
- MOVED: That under Debt and Interest on Debt the sum of \$5,576,522 be appropriated, to be raised by General Tax.
- MOVED: That under Capital Expenditures the sum of \$101,008 for additional Pavement Management appropriations, other sums having already been appropriated under warrant article #9

ARTICLE 5

MOVED: That there be appropriated and paid to the elected officers of the Town as salaries for the financial year commencing July 1, 2011, the amount set opposite the name of each as follows:

Town Moderator	\$200
Chairman of the Board of Selectmen	\$5,000
Selectman (2)	\$4,500 each
Town Clerk	\$74,591
Town Treasurer	\$89,145
Chairman of the Board of Assessors with CAE	\$3,030
Assessor (1) with CAE	\$2,424
Assessor (1)	\$2,196
 TOTAL	 \$185,586

and that the sum of \$185,586 be raised by General Tax; and that in consideration of the salaries determined as aforesaid or, in case of appointive officers as determined by the Selectmen, all fees which have heretofore been paid by statute to the Town Clerk, Treasurer, Tax Collector, and any other officers, shall be paid by them upon their receipt into the Town Treasury.

ARTICLE 6

MOVED: That there be, and hereby is, appropriated the sum of \$22,500 to provide non-contributory pensions for eligible employees of any and all of the Town Departments as provided in the applicable sections of Chapter 32 of the General Laws as may be determined from time to time by the Retirement Board, said sum to be raised by General Tax and expended under the direction of the Retirement Board.

ARTICLE 7

MOVED: That there be, and hereby is, appropriated the sum of \$5,048,088 to provide contributory pensions and expenses in connection therewith in accordance with applicable provisions of Chapter 32 of the General Laws, said sum to be raised by General Tax and expended under the direction of the Retirement Board.

ARTICLE 8

MOVED: That there be, and hereby is, appropriated the sum of \$532,410 for the repair, improvement and construction of highways within the Town, said sums to be offset by reimbursement from the Commonwealth as provided by Chapter 90 of the General Laws and acts in amendment thereof and in addition thereto, the same to be expended under the direction of the Board of Selectmen.

ARTICLE 9

MOVED: That the sum of \$2,087,760 be, and hereby is appropriated to lease/purchase of Public Safety Equipment, Site improvements, Public Works Equipment and Furnishings and Equipment for Town Facilities, and consulting services, to construct public ways, and for Building and Facility and Public Works Construction; and for Major Maintenance and Alterations (including design work) as follows:

**Building Facility & Public Works Construction**

White Field House & Burbank School – replacement/removal of exterior stairs	39,000
Schools building envelop project	250,000
Repoint brick walls @ Police Station	<u>60,000</u>
Subtotal	<b>349,000</b>

**Departmental Equipment**

High School Burner Replacement	100,000
Rebuilding 2 heating units in HS field house gymnasium	15,000
Network Switching Equipment (phase 2 of 3) High School	60,000
Police Network Switches replacement	19,500
Library Digital Microfilm reader - replacement of 15 yr old equip,	11,135
Highway - Snowfighter conversion - #33	40,750
Highway - Material Spreader/Truck Rehab - #32	25,000
Council on Aging - Belder Bus grant match	13,000
Highway - 2 - 10' Power Angle Snow Plows replacement	<u>16,600</u>
Subtotal	<b>300,985</b>

**Infrastructure & Construction**

Sidewalks	135,000
Pavement management	<u>                    </u>

	<u>1,132,000</u>
Subtotal	1,267,000
<b>Lease of Public Safety Equipment</b>	
Lease purchase - Public Safety Equipment year 1 of 5 *	<u>149,000</u>
Subtotal	149,000
<b>Site Improvements</b>	
Parks - Pequossette Tennis Courts Crack Seal & Resurface	<u>21,775</u>
Subtotal	21,775
<b>Total</b>	<u><u>2,087,760</u></u>

\* Lease purchase is for replacement of portable radios in Police & Fire departments, replacement of Self Contained Breathing Apparatus and fill station in the Fire department (SCBA), and a Rescue Ambulance (total value of leased equipment (\$596,000)

Said sums to be expended under the direction of the Board of Selectmen, Library Trustees, and the School Committee as appropriate, and that said sums be hereby raised as follows: \$1,987,760 by General Tax, and by transfer of \$100,000 from the Capital Endowment Fund; and that the Town Accountant be and hereby is authorized to make the transfers on the books of the Town.

Further that the amount of \$167,464.45 of prior year turnbacks from completed capital projects be reappropriated as follows:

Sidewalks	9,000.00
Cemetery – Riding lawnmower	13,000.00
Orphan project – Air duct cleaning in all schools	130,000.00
Orphan project – Replace main exterior entry door in Burbank & Butler Schools	15,464.45

#### ARTICLE 10

MOVED: That there be, and hereby is, appropriated the sum of \$4,887,576 from the accounts classified as “Water Enterprise Fund”, pursuant to Chapter 44, Section 53F½ of the General Laws for water service, said sum to be expended under the direction of the Board of Selectmen, said appropriation to be funded by a transfer from Retained Earnings of \$0 and \$5,045,449 from Water Revenues, less \$157,873 in water indirect costs being appropriated under Article 4.

MOVED: That there be, and hereby is, appropriated the sum of \$7,585,485 from the accounts classified as "Sewer and Stormwater Enterprise Fund", pursuant to Chapter 44, Section 53F½ of the General Laws for sewer and stormwater service, said sum to be expended under the direction of the Board of Selectmen, said appropriation to be funded by a transfer from Retained Earnings of \$0 and \$7,710,485 of sewer revenues, less \$125,000 in sewer indirect costs being appropriated under Article 4.

ARTICLE 12

MOVED: That there be, and hereby is, transferred the sum of \$150,000 from the sale of cemetery lots account to the Cemetery Perpetual Care Fund.

**TOWN OF BELMONT EXPENDITURES  
FY2012 PROPOSED BUDGETS**

MUNIS Org & Obj	Account Title	EXPENDED					FY12 AVAIL FUNDS BUD	FY12 TOWN PROPOSED		% Chg Level Service to FY11
		FY10	FY11 TOWN FINAL VOTE	FY11 TOWN EST EXPENSES	FY12 TOWN EST EXPENSES	FY12 TOWN PROPOSED				
<b>SUMMARY BY FUNCTION</b>										
1100	LEGISLATIVE SERVICE	11,563	11,920	11,920	12,135	12,135	12,135.00	1.8%		
1620	ELECTION & REGISTRATION	110,186	187,616	187,416	177,580	177,580.00	177,580.00	-5.3%		
1610	TOWN CLERK	159,627	130,436	130,730	145,665	149,665.00	149,665.00	14.7%		
1220	BOARD OF SELECTMEN	47,325	51,442	50,422	51,605	51,605.00	51,605.00	0.3%		
	VEW LEASE	7,500	7,500	7,500	7,500	7,500.00	7,500.00	0.0%		
1970	COMMUNITY RELATIONS	618	1,592	-	-	-	-	-		
1980	COMMISSIONS/COMMITTEES	21,670	21,924	21,383	21,895	21,895.00	21,895.00	-0.1%		
1230	GENERAL MANAGEMENT SERVICE	297,275	301,214	294,889	300,964	300,964.00	300,964.00	-0.1%		
1550	INFORMATION TECHNOLOGY	573,452	672,935	671,115	749,999	841,099.00	841,099.00	25.0%		
1520	HUMAN RESOURCES	244,526	249,430	246,280	250,929	250,929.00	250,929.00	0.6%		
1510	LEGAL SERVICES	237,327	240,000	223,000	240,000	240,000.00	240,000.00	0.0%		
1320	RESERVE FUND	400,000	400,000	400,000	400,000	400,000.00	400,000.00	0.0%		
1350	FINANCE & ACCOUNTING SERVICE	312,889	357,049	362,193	363,809	363,809.00	363,809.00	1.9%		
1410	ASSESSING SERVICES	360,518	371,930	371,798	391,319	391,319.00	391,319.00	5.2%		
1450	TREASURY MANAGEMENT & COLL	456,735	514,108	514,108	539,687	539,687.00	539,687.00	5.0%		
1470	PARKING CLERK	19,316	43,015	43,015	43,015	43,015.00	43,015.00	0.0%		
	<b>TOTAL GENERAL GOVERNMENT</b>	<b>3,260,526</b>	<b>3,562,111</b>	<b>3,535,769</b>	<b>3,696,102</b>	<b>3,791,202.00</b>	<b>3,791,202.00</b>	<b>6.4%</b>		
9110	RETIREMENT	4,354,685	4,567,332	4,567,332	5,070,588	5,070,588.00	5,070,588.00	11.0%		
9450	INSURANCE & RESERVE	1,658,547	1,819,593	1,790,500	2,022,381	1,893,210.00	1,893,210.00	4.0%		
	<b>TOTAL BENEFITS UNCLASSIFIED</b>	<b>6,013,233</b>	<b>6,386,925</b>	<b>6,357,832</b>	<b>7,092,969</b>	<b>6,963,798.00</b>	<b>6,963,798.00</b>	<b>9.0%</b>		
2110	POLICE ADMINISTRATION	344,847	376,526	376,884	410,774	410,774.00	410,774.00	9.1%		
2960	PUBLIC SAFETY COMMUNICATION	787,446	820,405	815,405	816,591	816,591.00	816,591.00	-0.5%		
2120	POLICE RECORDS	80,591	83,184	83,184	83,184	83,184.00	83,184.00	0.0%		
2130	POLICE PATROL SERVICES	3,509,200	3,769,018	3,765,206	3,896,256	3,918,915.00	3,918,915.00	4.0%		
2140	POLICE TRAFFIC MANAGEMENT	386,875	418,732	438,861	440,260	440,260.00	440,260.00	5.1%		
2150	POLICE DETECTION & INVESTIGAT	451,809	439,795	445,177	449,496	449,496.00	449,496.00	2.2%		
2160	POLICE COMMUNITY SERVICE	305,969	270,418	254,578	254,811	254,811.00	254,811.00	-5.8%		
2210	FIRE ADMINISTRATION	553,640	593,128	599,041	573,081	573,081.00	573,081.00	-3.4%		
2220	FIRE SUPPRESSION & CONTROL	4,124,980	4,321,862	4,326,125	4,411,269	4,422,069.00	4,422,069.00	2.3%		
2300	EMERGENCY MEDICAL AGENCY SERVICE	158,153	179,740	167,550	168,720	168,720.00	168,720.00	-6.1%		
2910	EMERGENCY MANAGE AGENCY (BI)	14,806	21,710	20,210	21,710	21,710.00	21,710.00	0.0%		
	<b>TOTAL PUBLIC SAFETY</b>	<b>10,718,318</b>	<b>11,294,518</b>	<b>11,292,221</b>	<b>11,526,152</b>	<b>11,559,611.00</b>	<b>11,559,611.00</b>	<b>2.3%</b>		
3000	PUBLIC SCHOOLS - OPERATING	39,197,659	39,702,570	39,702,570	40,565,083	41,575,783.00	41,575,783.00	4.7%		
3900	PUBLIC SCHOOL - LARGE MAINT PR	-	-	-	-	-	-	-		
	MINUTEMAN REGIONAL VOC. SCHK	806,365	751,311	751,311	850,000	888,119	888,119	18.2%		
	<b>TOTAL PUBLIC SCHOOLS</b>	<b>40,004,024</b>	<b>40,453,881</b>	<b>40,453,881</b>	<b>41,415,083</b>	<b>42,463,902.00</b>	<b>42,463,902.00</b>	<b>5.0%</b>		

General Fund Appropriations

TOWN OF BELMONT EXPENDITURES  
FY2012 PROPOSED BUDGETS

MUNIS Org & Obj	Account Title	FY10					FY11 TOWN		FY11 TOWN		FY12 TOWN		% Chg Level Service to FY11
		EXPENDED	FINAL VOTE	EST EXPENSES	FUNDS BUD	PROPOSED	FY11 TOWN	FY11 TOWN	FY12 TOWN	FY12 TOWN			
1800	COMM. DEVELOPMENT-ADMIN	250,375	259,035	257,998	270,415	270,415.00				270,415.00		4.4%	
1750	COMM. DEVELOPMENT- PLANNING	342,038	258,036	254,028	257,019	257,019.00				257,019.00		-0.4%	
4110	COMM. DEVELOPMENT-ENGINEERIN	130,946	150,645	150,545	145,753	145,753.00				145,753.00		-3.2%	
2410	COMM. DEVELOPMENT-INSPECTION	220,973	234,245	231,718	227,037	232,037.00				232,037.00		-0.9%	
4210	PUBLIC WORKS ADMINISTRATION	290,720	313,514	308,514	310,926	310,926.00				310,926.00		-0.8%	
4220	STREET MAINTENANCE	510,267	562,765	558,288	649,630	629,630.00				629,630.00		11.9%	
4230	SNOW REMOVAL	543,788	552,373	552,373	552,373	552,373.00				552,373.00		0.0%	
4250	CENTRAL FLEET MAINT-HWY FAC	452,367	539,301	517,781	523,956	552,366.00				552,366.00		2.4%	
4260	FORESTRY SERVICE	283,737	222,824	222,493	238,435	248,435.00				248,435.00		11.5%	
6510	DELTA MAINTENANCE	48,472	50,438	48,816	58,540	58,540.00				58,540.00		16.1%	
6500	PARKS & FACILITIES	643,458	733,646	716,813	681,415	673,698.00				673,698.00		-8.2%	
4330	SOLID WASTE/COLL. & DISPOSAL	2,309,730	2,515,641	2,512,866	2,519,615	2,349,615.00				2,349,615.00		-6.6%	
4910	CEMETERY MAINTENANCE	437,322	473,035	447,380	438,004	438,004.00				438,004.00		-7.4%	
4240	STREET LIGHTING	246,606	308,875	308,875	308,875	283,754.00				283,754.00		-8.1%	
1920	BUILDINGS	1,153,657	1,399,633	1,247,531	1,308,979	1,287,189.00				1,287,189.00		-8.0%	
	<b>TOTAL PUBLIC SERVICES</b>	<b>7,864,456</b>	<b>8,574,006</b>	<b>8,336,019</b>	<b>8,490,972</b>	<b>8,289,754.00</b>				<b>8,289,754.00</b>		<b>-3.3%</b>	
5100	HEALTH SERVICES	325,047	316,148	296,874	303,235	304,848.00				304,848.00		-3.6%	
2920	ANIMAL CONTROL	70,893	75,201	75,251	75,451	75,451.00				75,451.00		0.3%	
5420	YOUTH COMMISSION	-	-	-	-	-				-		-100.0%	
2440	SEALER OF WEIGHTS & MEASURES	5,220	5,430	2,000	-	-				-		0.3%	
5410	COUNCIL ON AGING	367,356	353,966	352,066	354,905	354,905.00				354,905.00		0.0%	
5430	VETERANS' SERVICES	22,920	25,525	25,525	25,525	25,525.00				25,525.00		0.0%	
	<b>TOTAL HUMAN SERVICES</b>	<b>791,437</b>	<b>776,270</b>	<b>751,716</b>	<b>759,116</b>	<b>760,729.00</b>				<b>760,729.00</b>		<b>-2.0%</b>	
6110	LIBRARY ADMINISTRATION	368,975	388,584	389,209	399,096	399,096.00				399,096.00		2.7%	
6120	LIBRARY PUBLIC SERVICES	1,075,161	1,137,624	1,136,275	1,198,825	1,216,025.00				1,216,025.00		6.9%	
6130	LIBRARY TECHNICAL SERVICES	240,177	265,747	265,322	262,773	262,773.00				262,773.00		-1.1%	
6310	RECREATION ADMINISTRATION	166,886	160,506	157,495	158,149	158,149.00				158,149.00		-1.5%	
6320	RECREATION PROGRAMS	479,595	486,216	478,358	519,151	519,151.00				519,151.00		6.8%	
	<b>TOTAL CULTURE &amp; RECREATION</b>	<b>2,330,793</b>	<b>2,438,677</b>	<b>2,426,659</b>	<b>2,537,994</b>	<b>2,555,194.00</b>				<b>2,555,194.00</b>		<b>4.8%</b>	
7100	MATURING DEBT	3,643,170	3,958,191	3,958,191	3,553,191	3,553,191.00				3,553,191.00		-10.2%	
7510	INTEREST ON MATURING DEBT	1,334,798	2,178,818	2,178,818	2,023,331	2,023,331.00				2,023,331.00		-7.1%	
	<b>TOTAL DEBT &amp; INTEREST</b>	<b>4,977,968</b>	<b>6,137,009</b>	<b>6,137,009</b>	<b>5,576,522</b>	<b>5,576,522.00</b>				<b>5,576,522.00</b>		<b>-9.1%</b>	

TOWN OF BELMONT EXPENDITURES  
FY2012 PROPOSED BUDGETS

Org & Obj	Account Title	FY10 EXPENDED	FY11 TOWN FINAL VOTE	FY11 TOWN EST EXPENSES	FY12 AVAIL FUNDS BUD	FY12 TOWN PROPOSED	% Chg Level Service to FY11
MUNIS							
9000	TRANSFER TO OTHER FUNDS	-	-	-	-	-	
	TRANSFER OUT	-	-	-	-	-	
	CAPITAL PROJ - DISCRETIONARY	681,098	955,793	955,793	955,760	1,224,232.45	28.1%
	CAPITAL PROJ - ROADS NON DISCR	1,077,275	1,104,207	1,104,207	1,132,000	1,132,000.00	2.5%
	TOTAL CAPITAL BUDGET	1,758,373	2,060,000	2,060,000	2,087,760	2,356,232.45	14.4%
	TOTAL OPERATING BUDGET	77,719,128	81,683,397	81,351,106	83,182,670	84,316,944.45	2.2%
	ABATEMENTS & EXEMPTIONS	800,000	800,000	800,000	800,000	800,000.00	0.0%
	TOTAL OVERLAY	800,000	800,000	800,000	800,000	800,000.00	0.0%
	TOTAL TOWN OPERATING BUDGE	78,519,128	82,483,397	82,151,106	83,982,670	85,116,944.45	3.2%
8000	CHERRY SHEET CHARGES	1,507,260	1,493,646	1,493,646	1,530,884	1,491,775.00	-0.1%
	TOTAL STATE CHARGES	1,507,260	1,493,646	1,493,646	1,530,884	1,491,775.00	-0.1%
	GRAND TOTALS	80,026,388	83,977,043	83,644,752	85,513,554	86,608,719.45	3.1%



# Warrant Committee Report Town of Belmont FY 2012 Budget

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May 2011

## 2010-2011 Warrant Committee Members

Elizabeth Allison (chair)  
Sami Baghdady  
Kimberly Becker  
M. Patricia Brusch  
Margaret M. Callanan  
Adam Dash  
Roy J. Epstein  
Michael D. Libenson  
Elizabeth Grob  
William M. Lynch (vice chair)  
Raffi Manjikian  
Mary McHugh  
Noreen Millane  
Robert Sarno  
Eric Smith (secretary)

Ex officio

Ralph Jones, Chair, Board of Selectmen  
Laurie Slap, School Committee

## Warrant Committee Report

Town Meeting, May 11, 2011

Tradition dictates that the Warrant Committee report to Town Meeting begin, "A principal function of the Warrant Committee, more fully described in Article 19 of the Town Bylaw, is to report to Town Meeting on all Warrant Articles that involve an appropriation of money." The Belmont Warrant Committee consists of fifteen residents appointed by the Moderator for staggered three-year terms, plus a representative of the Board of Selectmen and the School Committee, usually the Chairs."

If it did not, we would almost certainly begin, "FY2012 was the year that "I'm from the [state] government and I'm here to help you," turned out to be true. When FY2012 revenue was first estimated in November 2010, it appeared that the increase in revenue available for operating budgets after providing for pensions and health care costs would be on the order of 1%. Coupled with anticipated cost increases in the schools that would have meant painful programmatic cuts in educational offerings in Belmont schools and continued underinvestment in key capital maintenance and investment programs in Town departments.

But favorable developments intervened. In late April, the Legislature provided state aid and circuit breaker grants that were almost \$1.4 million more than anticipated. The Department of Public Works negotiated an improved trash collection contract and generally provided economies throughout its programs saving \$160K. The Belmont Light Department lowered its rates for savings of \$123K. Better than expected experience in our self-insured health plan plus renegotiation of one retiree medical plan lowered health care costs by \$270K. While there were also some negative developments, we are now able to propose a budget to Town Meeting (Table 1) of \$86,608,719.

Table 1: Highlights of FY2012 Budget

		FY2011	FY2012	% change
Total Budget		\$83,977,043	\$86,608,719	3.1%
Operating Budget	Schools	\$39,702,570	\$41,575,783	4.7%
	Town	\$29,420,968	\$30,073,932	2.2%
	Total	\$69,123,538	\$71,649,715	3.7%
Capital Budget		\$955,793	\$1,224,232	28.1%
Non Discretionary		\$14,853,505	\$14,959,004	0.7%

This budget provides an overall increase of 3.1% and with allocation of the new revenue plus cost savings provided to the school budget, a 4.7% increase in the

School operating budget. While this increase does not provide for all important programs, it is at least a path to a reasonable provision of services.

There is also an increase in capital spending, although the dollar amounts are small. Non-discretionary expenses are our obligations fixed in dollar terms, such as debt repayment and interest. This line showed a small decline, largely because of a decline in debt and interest payments. We have paid off the rink and MUNIS, the Town's information and accounting system, and reduced the cost of the Wellington bond.

## **II. Outlook for FY2013 and Beyond**

That is the good news. The bad news is that the items that allowed us to provide reasonable budgets are largely onetime items. We have not addressed the key issue in the Belmont budget: that municipal costs are growing at a rate that is not just higher than our revenues but higher than costs in comparable non-municipal sectors of the economy; e.g. inflation in the service sector now hovers around 1%.

This is largely a compensation issue, although the particulars differ from department to department. In the school budget, there are issues with cash compensation and retiree medical. Teacher salary increases begin with a "step" increase averaging 3.3% per year, to which are added, cost of living increases, "lane" increases for additional education and a variety of stipends. In the 2007 - 2010 contract, the sum of step and COLA increases alone provided annual increases of 7.8%.

Health care costs are a concern across all departments. Belmont's move to a self insured system has allowed it to lower its per policy increases to the 5%-6% range. However its plan design relative to plans offered by most private industry or private non-for-profit employers plus increased unemployment has also led to an increase in enrollments, particularly family enrollment. The Town's current cost per family is \$16,220. Retiree health care costs are of particular concern. The current state retirement plan allows teachers to retire at 55 with ten years of service; public safety employees can retire at 45 under some circumstances. In any case, we offer health insurance (individual and family) until the employee becomes Medicare eligible, and thereafter supplements Medicare benefits at a cost currently averaging \$6400 per year. This benefit, which has largely disappeared from the private sector creates very significant future liabilities of an unknown magnitude for the Town.

Finally pension and disability costs are a major issue. In FY2012, pension costs increased by over 12% to approximately \$5.1 million. Public safety retirees, including those retiring on disability accounted for 63% of those costs.

Obviously, these are complex issues, involving what are certainly "core" employees. They require help from the State; the current legislative initiatives to

allow towns to change plan design outside collective bargaining, supported by Representative Brownsberger, would be very useful. But local initiatives are underway as well. The School Committee is actively studying the structure of its collective bargaining agreements and the Police Chief and Fire Chief have engaged a consultant to examine the disability issue and provide alternative approaches.

### **III. Downside and Upside**

While we have tried to present a realistic budget, there are (at least) several major risks to these numbers. First, although all major departments adjusted their expense estimates in April to account for rising energy costs, an 8-10% increase or more would lead to serious unbudgeted expense pressures. Second, what the state gives, the state can take away. Although the improving Massachusetts economy makes the likelihood of midyear cuts in State aid unlikely, a major decline in the stock market reducing state revenues might, for example, produce such cuts.

Upside opportunities are fewer and smaller. There are several departments where fees may be higher than forecasted. If the economic situation improves, the assessors will be able to release reserves they are holding against unpaid taxes. Finally, the collective bargaining agreements covering the majority of town and school employees are still open. The terms of these settlements will be critical to the ability of the town to manage its costs.

### **IV. Organization of the Report**

As begun in last year's report, Warrant Committee continues a programmatic approach to analyzing the budget. Under this approach, we endeavor to identify the programs undertaken or provided by each Town department and then analyze the actual cost of those programs including cross-subsidies within the Town. For each department, we have provided a spending overview; programmatic analysis; expenses analysis; cuts and adds; long-term issues; and then our observations and recommendations. We continue to refine this analysis and hope that Town Meeting members find the format useful.

Presentation of the report is by department, following the order in which budgets are generally presented to Town Meeting. In cases where there was more useful information on department activities than could be accommodated within the printed report, additional detail will be posted on the Town website under the Warrant Committee heading.

# Review of Departmental Budgets

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## 1. GENERAL GOVERNMENT

The General Government subcommittee report covers: Accounting and Finance, Assessor, Human Resources, Information Technology, Selectman, Town Administrator, Town Clerk, and Town Treasurer.

### A. Accounting and Finance

#### Description of department/mission

The Accounting & Finance department is responsible for all the accounting issues for the town, including reporting, auditing, purchasing, budgeting, accounts payable. It is also responsible for internal control/auditing and external certification as required by state and federal authorities.

#### Spending overview

	Proposed Budget	Level Services
Operating budget	\$363,809	\$363,809
Operating expenses, building services*	\$6,856	\$6,856
Operating expenses, other		
Capital budget	0	0
Debt repayment	\$73,303	\$73,303
Pension	\$115,958	\$115,958
Retiree medical	\$21,367	\$21,367
Other expenses		
Total	\$581,293	\$581,293

#### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$161,742	3.2
2011	\$357,049	3.2
2012		
Proposed Budget	\$363,809	3.2
Level Services	\$363,809	3.2
% change: FY2011–2012		
Proposed Budget	1.9%	0.0%
Level services	1.9%	0.0%

Average annual growth 2002-2011	
This department	9.2%
All Belmont	3.9%

**Programmatic analysis**

a) Program and costs

Program	Budget \$	Budget %	FTEs	FTE%
Accounting	\$77,589	21.42%	.8	25%
Audit	\$130,238	35.96%	.8	25%
Budget	\$90,555	25%	.8	25%
Other	\$13,000	3.59%		0%
A/P	\$50,779	14.03%	.8	25%
	\$362,161	100%	3.2	100%

**Expense analysis**

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY 2011 Actual	Available Revenue	Level Services
Audit Town Records	\$50,200	\$56,200	\$56,200

This increase is due to bidding a new contract necessary to audit town records.

**Proposed Cuts and Adds:**

None noted

## Long term issues

. The Accounting and Finance department will continue to face the challenge of increased reporting requirements while maintaining the same staffing levels. Increased efficiencies through better use of technology can be a potential offset to these higher reporting and coordinating requirements.

## Observations and recommendations

Initiation of EFT payment procedures to increase efficiency of the accounts payable function can improve productivity.

Continued development of programmatic budgeting and performance measurement is critical.

The Accounting and Finance department will be charged with implementing the financial processes and procedures for the Community Preservation Act (CPA). This will be a challenging task given the present level of staffing.

## B. Assessor

### Description of department/mission

The Assessor is to list and value all real estate and personal property in the town. All values are based on "full and fair cash value" or 100% of the market value. The department is also charged with the administration of tax exemptions, excise, real estate and personal property exemptions as well as inspections and changes in value due to structural additions. The department operates with three full time and one part time employee, and an elected board making policy decisions.

### Spending overview

	Proposed Budget	Level Services
Operating budget	\$391,319	\$391,319
Operating exp.	\$9,869	\$9,869
Capital Budget	0	0
Debt repayment	0	0
Pension	\$62,259	\$62,259
Retiree medical	\$20,342	\$20,342
Total	\$483,789	\$483,789
Revenue offsets	\$0	

### Trends in Spending and Headcount

Fiscal Year	Operating	Headcount
-------------	-----------	-----------

	budget	(FTE)
2002	\$259,498	3.4
2011	\$371,930	3.4
2012		
Proposed Budget	\$391,319	3.8 (a)
Level Services	\$391,319	3.8
% change: FY2011–		
2012		
Proposed Budget	5.2%	11.8%
Level services	5.2%	11.8%
Average annual growth		
2002-2011		
This department	4.1%	0.0%
All Belmont	3.9%	

(a) Increase from 3.4 to 3.8 reflects Board of Assessor's time.

### Programmatic analysis

#### a) Program and costs

Program	% of total hours
Valuation and Reports	28%
Permits, Inspections & Sale Proc.	26%
Exemptions & Abatements	27%
Motor Vehicle. Excise	17%
Misc.	2%
Total	100%

### Expense analysis

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Actual	Available Revenue	Level Services
No line items have increased more than 5%.	-	-	-

### Proposed cuts and adds

None at this time.

## Long term issues

The Town of Belmont recently passed the Community Preservation Act (CPA). The Assessors' Office is working on incorporating this new revenue stream into the Town's accounting system. Those taking advantage of exemptions will continue to be tracked in order to provide insight into future budget assumptions.

## Observations and recommendations

The Overlay Account is managed by the Board of Assessors to cover exemptions and abatements as well as the senior work-out program. Each year is treated as a separate account. Verizon cases pending have also required the withholding in reserves of approximately \$200,000 for FY '09 and FY '10 collectively. It will be important moving forward to receive early in the budgetary process, an accurate estimate of potential monies to be released from the fund.

As with other Town departments, the use of technology to reduce costs and improve service should be explored.

## C. Human Resources

### Department Mission/Description of Services

The Human Resources Department provides personnel services including administering benefits for current employees, retirees, and survivors, for both Town and School. In addition, the Department handles employee and labor relations matters, including employee grievances, disciplinary issues, and contract negotiations. It implements pay and position classification revisions and assists other departments in recruiting staff.

### Spending Overview

	Proposed Budget	Level Services
Operating Budget	\$250,929	\$250,929
Capital Budget	\$0	\$0
Debt Repayment	\$27,388	\$27,388
Pension	\$13,908	\$13,908
Retiree Medical	\$8,056	\$8,056
Utility and Maintenance Costs	\$7,717	\$7,717

Total	\$307,998	\$307,998
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The operating budget continues to account for approximately 85 percent of total department spending, with the balance consisting of retiree benefits and building service costs

**Trends in Spending and Headcount:**

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$199,305	
2011	\$249,430	2.7
2012		
Proposed Budget	\$250,929	2.7
Level Services	\$250,929	2.7
% change: FY2011–2012		
Proposed Budget	0.6%	0.0%
Level services	0.6%	0.0%
Average annual growth 2002-2011		
This department	2.5%	
All Belmont	3.9%	

**Programmatic Analysis**

a) Programs and Costs

Program	FTE's	FTE %	Budget \$	Budget %
Benefits Administration	0.95	35%	\$82,295	33%
Employee/Labor Relations	0.40	15%	\$47,980	19%
Pay & Classification	0.05	2%	\$5,723	2%
Employment Regulation				
Compliance	0.60	22%	\$45,027	18%
Recruitment	0.20	7%	\$27,032	11%
Assistance	0.51	19%	\$40,675	17%
Total	2.71	100%	\$248,732	100%

Benefits administration continues to account for the largest share of both staff time (35%) and budget dollars (33%) for this department

### **Expense Analysis**

There are no budget items which increase by more than 5% and \$5000.

### **Proposed Cuts and Adds**

None.

### **Long Term Issues**

As stated in last year's report, there are two areas in which structural change might be considered. The first is regionalization of some service functions, particularly in the benefits administration area. Differences among town collective bargaining agreements would need to be considered in assessing the possible gains from such consolidation.

A much discussed possibility is the consolidation of Town and School Human Resources functions, an initiative that has been implemented in other towns in Eastern Massachusetts with mixed results. This proposal is not being actively considered at this time.

### **Observations and Recommendations**

The use of MUNIS, or other alternatives, could reduce the time spent on benefits administration for this department with a small staff. IT help would be required for its implementation,

Pay classifications, pay increases, pay rates and job descriptions should be reviewed for non-union employees. Currently, pay rates for these employees are based on the Position Classification study performed by DMG-MAXIMUS in 2000. These rates have been increased via cost of living adjustments during subsequent years. The last update to these pay scales was issued in July 2009.

The pay rates assigned to the position classifications are approved by Town Meeting, and only Town Meeting can change them.

Now that the new Enhanced Value health insurance plan has been in force for almost six months, the Board of Selectmen has voted to drop the old Enhanced plan. Given the significant financial impact of retiree health care costs, this area requires further study.

All eight of the Town's collective bargaining contracts are being renegotiated this year. As of this writing, three of these contracts have been settled; four are still in

negotiations; and, for one, impasse has been declared, and the State has been asked to mediate.

#### D. Information Technology

##### Description of department/mission

The IT Department provides strategic technology planning services to all Town departments. The Department's functions include: user support ((help desk, printers, laptops, PC replacement); enterprise software planning and maintenance, file server and communications maintenance, and administration and technology training.

##### Spending overview

	Proposed Budget	Level Services
Operating budget	\$636,999	\$636,999
Capital budget	\$204,100	\$113,000
Debt repayment	\$0	\$0
Pension	\$0	\$0
Retiree medical	\$0	\$0
Utility and maint. costs	NA	NA
Total spending	\$841,099	\$749,999

##### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	NA	NA
2011	\$559,935	5
2012		
Proposed Budget	\$636,999	5
Level Services	\$636,999	5
% change: FY2011– 2012		
Proposed Budget	13.8%	0.0%
Level services	13.8%	0.0%
Average annual growth 2002-2011		
This department	NA	
All Belmont	3.9%	

## Programmatic analysis

### a) Program and costs

Program	Budget \$	Budget %
Desktop Services	\$154,393	23%
ERP System Admin.	\$219,468	32%
GIS/DB Admin.	\$117,106	17%
File Server/Comms.	\$160,624	23%
Technology Training	\$34,245	5%

## Expense analysis

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Actual	FY2012 Alternative Budgets		
		Available Revenue	Level Services	Override
Professional services (network security)	\$0	\$50,000	\$50,000	NA
Software licenses	\$69,200	\$74,500	\$74,500	NA
Hardware supplies	\$22,000	\$32,000	\$32,000	

In addition, several one time projects have been added as described below.

### Proposed cuts and adds

A total of \$91,100 has been proposed for one time projects including an external study of the Town's fiber network, implementation of a new software platform to make the Town website more useful to residents, and improvements in security and reliability of Police Department communications.

### Long term issues

Possible synergies from combining four separate IT organizations (town, school, police, and library) into single office.

### Observations and recommendations

Department is investigating reducing number of town servers and software license fees by moving to cloud-based computing model. Financial savings and increase in staff efficiency could be substantial.

Town IT department is commended for maintaining level services within available funds budget.

## E. Town Administrator

### Description of department/mission

The Department's mission is to provide general Town management services; manage insurance and legal services; administer the Town's dealings with the VFW and American Legion; handle community relations; and support the Board of Selectmen, various Town Committees and Town Meeting.

### Spending overview

	Proposed Budget	Level Services
Operating budget	\$926,359	\$926,359
Capital budget	\$0	\$0
Debt repayment	\$600,000	\$600,000
Pension	\$20,161	\$20,161
Retiree medical	\$30,750	\$30,750
Utility and Maint. Costs	\$25,964	\$25,964
Total	\$1,603,234	\$1,603,234
Revenue offsets:		
License Fees	\$37,301	\$37,301

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$625,250	
2011	\$942,096	3.8
2012		
Proposed Budget	\$926,359	3.8
Level Services	\$926,359	3.8
% change: FY2011-- 2012		
Proposed Budget	-1.7%	-100.0%
Level services	-1.7%	0.0%
Average annual growth 2002-2012		

This department	4.7%
All Belmont	3.9%

**Programmatic analysis**

a) Program and costs

Program	Budget \$	Budget %
BOS Support	\$139,957	15%
VFW/Amer. Legion	\$7,500	1%
Legal Services	\$284,296	31%
TM, Committees Support	\$90,730	10%
Community Relations	\$44,844	5%
Insurance	\$343,539	38%
Total	\$910,866	100%

The largest amount of staff time is spent in BOS support.

**Expense analysis**

No items increased by more than 5% and \$5000.

**Proposed cuts and adds**

None.

**Long term issues**

Shifting powers to the Town Administrator should be explored to allow for more personnel oversight. The Town Administrator's ability to effect reforms is severely hampered by the Town's byzantine organizational chart, in which very few department heads report to the Town Administrator. Changing to a Town Manager form of government could also solve operational issues, thereby generating efficiencies.

**Observations and recommendations**

The pursuit of regionalization and consolidation of Town services should continue being explored. Consolidation of certain Town programs should also be explored.

Further automation, both through the Town website and otherwise, would create future efficiencies and increase public interaction with the Town.

Changing Town Counsel was an opportunity for cost savings, although no savings are currently forecast as a result of putting the legal services out to bid.

Management of the Beech Street Center was moved to the Council on Aging in 2011 from the Town Administrator's office. The effectiveness of this alternative arrangement should be monitored.

The VFW lease carries a financial (\$7500) cost and is a foregone opportunity for the Town. Exploration of alternate arrangements should continue.

Legal Services were put out to bid, as suggested in last year's Warrant Committee report in the hope of generating savings. The new Town Counsel chosen by the Board of Selectmen will not generate any change to the budget.

## **F. Town Clerk**

### **Department Mission/Description of Services**

The Town Clerk Department is responsible for three major programs. The Legislative program supports Belmont's Town Meeting and includes the issuance of the Warrant, recording of Town Meeting proceedings, and posting of Town Meeting votes locally and with the State. The Elections and Registrations program includes preparing for, conducting, and tallying the results of Town, State, and Federal elections. The Town Clerk program covers record-keeping and licensing activities, including vital records maintenance, issuing birth, death, and marriage certificates, business licensing, pet licensing, and maintaining official town records.

The department operates with 4 FTE's, including the elected Town Clerk, the Assistant Town Clerk, and two office staff (one full-time and one part-time). In addition, the Town Moderator and Election Registrars are included in the Department's FTE count (at 0.1 FTE each).

### **Spending Overview**

The proposed operating budget for the Town Clerk Department has decreased from its FY2011 level, primarily due to the reduction in the expected number of elections (from 4 to 3) and some adjustments to earlier cost estimates. Overall spending is expected to increase, however, due to increased pension costs.

<b>Proposed Budget</b>	<b>Level Services</b>
----------------------------	---------------------------

Operating Budget	\$327,189	\$323,189
Capital Budget	\$0	\$0
Debt Repayment	\$63,718	\$63,718
Pensions	\$73,540	\$73,540
Retiree Medical	\$0	\$0
Disability	\$0	\$0
Utility and Maintenance Costs	\$17,953	\$17,953
Total	\$482,400	\$478,400
Revenue Offsets	\$89,276	\$89,276

### Trends in Spending and Headcount:

The Town Clerk's FTE count has remained stable. Operating budgets fluctuate largely because of differences in the number of Town Meeting sessions, where transcription services are a major cost component, and, differences in the number of elections. Thus poll worker and voting equipment maintenance costs were major contributors to a 70% increase in the FY2011 budget.

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$244,201	
2011	\$329,972	4.0
2012		
Proposed Budget	\$327,189	4.0
Level Services	\$323,189	4.0
% change: FY2011–2012		
Proposed Budget	-0.8%	0.0%
Level services	-2.1%	0.0%
Average annual growth 2002-2011		
This department	3.4%	
All Belmont	3.9%	

### Programmatic Analysis

#### b) Programs and Costs

The Elections and Registrations program is expected to consume more than half the Department budget in FY2012, despite accounting for only 39% of FTE time. This is

due to the large number of non-staff costs incurred in conducting elections; these costs have been budgeted at \$95,785, with poll workers (\$40,000) and voting equipment maintenance (\$36,000) the largest components.

Program	FTE's	FTE %	Budget \$	Budget %
Legislative	0.44	11.0%	\$31,777	9.8%
Elections & Registrations	1.56	39.0%	\$174,870	54.1%
Town Clerk	2.00	50.0%	\$116,542	36.1%
Total	4.00	100.0%	\$323,189	100.0%

### Expense Analysis

The following FY2012 budget line items have increased by more than 5% from the FY2011 level.

Line Item	FY2011 Estimated	FY2012 Proposed Budget	FY2012 Level Services	Explanation
Part-Time Salaries	\$18,494	\$21,284	\$21,284	Step increase; additional hours during elections
Health Insurance	\$11,607	\$22,204	\$22,402	New staff member enrollment
Copier Lease	\$1,845	\$2,205	\$2,205	Addition of scanner
Postage	\$4,600	\$8,240	\$8,240	Increased postal rates & reprecincting notices
Printing/Mailing	\$6,000	\$7,070	\$7,070	Reprecincting notices
Codification Project	\$0	\$5,000	\$5,000	New project

### Proposed Cuts and Adds

The salary for the Town Clerk has been reduced from the amount in the Department's initial FY2012 submission. The budget described here reflects the position's FY2011 starting salary plus a 4% step-equivalent increase, which is consistent with the current practice for non-elected town managers.

The sum of \$4000 has been added to the budget to support implementation of a Metropolitan Communications Corporation (MCC) software platform, currently used by the Treasurer's Office, which will allow residents to complete pet licensing on line and to request records remotely.

## Long Term Issues

Last year's report noted that the Town Clerk's Office has been slow to automate many of its processes and records. State law requires the maintenance of many records in hard copy format, and thus limits the Department's ability to convert to a "paperless" environment. However the additional investment in the MCC platform and Town Meeting approval of an article allowing electronic dissemination of selected town documents combined with developments already underway will accelerate this process.

## Observations and Recommendations

The progress being made on automating Town Clerk functions is substantial, and future plans for automating records, streamlining certificate and license issuance, and utilizing the Department's website appear promising.

One of the activities historically performed by the Department, the determination of whether children who seek to enroll in the public schools are in fact Belmont residents, will not be continued in the future. The School Department has decided to assume this responsibility. The respective capabilities of the two departments to perform this function should be assessed throughout FY2012.

It has been suggested that reducing the number of voting sites from the current 8 would result in cost savings. The Town Clerk does not believe resulting in significant cost savings; this issue should be examined and resolved after the post 2010 Census redistricting is complete.

## G. Town Treasurer

### Description of department/mission

The Treasurer's Department manages all cash collections, borrowings, investing and disbursements, insuring the safety of all funds and adequate liquidity to pay obligations as due. In addition, the Treasurer is responsible for a wide variety of other financial functions including the administration of payrolls, management of real estate and other tax collections, preparation of quarterly reports for the IRS, liaison with debt rating agencies, and serving as the Parking Clerk.

### Spending overview

Proposed	Level
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	Budget	Services
Operating budget	\$582,702	\$582,702
Capital budget	\$0	\$0
Debt repayment	\$0	\$0
Pension	\$91,268	\$91,268
Retiree medical	\$28,202	\$28,202
Utility and maint. costs	NA	NA
Total spending	\$702,172	\$702,172
Revenue offset (parking fines)	\$130,000	\$130,000

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$450,264	
2011	\$557,123	7.3
2012		
Proposed Budget	\$582,702	7.3
Level Services	\$582,702	7.3
% change: FY2011–2012		
Proposed Budget	4.6%	0.0%
Level services	4.6%	0.0%
Average annual growth 2002-2011		
This department	2.4%	
All Belmont	3.9%	

### Programmatic analysis

#### a) Programs and costs

Program	Budget \$	Budget %
Treasury management	\$220,921	39%
Collection	\$273,080	48%
Parking	\$71,231	13%

### Expense analysis

Health insurance was the only item both to increase 5% from the previous fiscal year and to increase of more than \$5,000: from \$27,357 in FY 2011 to \$44,827 in FY2012.

**Proposed cuts and adds**

None.

**Long term issues**

Possible further staff savings from consolidating town payment windows so that only one location is required to accept all in-person payments.

Town parking lot spaces are priced below market, currently \$3/day. Privatization of lots may generate more revenue.

**Observations and recommendations**

Parking fine receipts have fallen approximately \$70,000 since FY2008.

Substantial majority of non-seasonal employees now use direct payroll deposit.

Treasurer’s office is commended for maintaining level services within available funds budget.

**2. CULTURE AND RECREATION**

Culture and Recreation includes the Health Department, Recreation Department, Council on Aging (COA) and the Library.

**A. Council on Aging**

**Description of department/mission**

The mission of the Council on Aging (COA) is to advocate for and serve the senior citizens of the town. The COA carries out its mission through the direct provision of services including transportation, social services, nutritional services, health and wellness as well as enrichment services. The COA accounts for approximately 1.4% of the town side budget.

**Spending overview**

	Proposed Budget	Level Services
Operating Budget	\$354,905	\$354,905
Operating Expenses	\$36,773	\$36,773

Capital Budget	\$12,700	\$12,700
Debt Repayment	\$195,000	\$195,000
Pension	\$34,707	\$34,707
Retiree Medical	\$29,196	\$29,196
Other Expenses	\$22,750	\$22,750
Total	\$684,687	\$684,687
Revenue Offsets		
Revolving fund	\$38,760	\$38,760
Grants	\$41,157	\$41,157
Total Offsets	\$79,917	\$79,917

COA overall spending is significantly different from its operating budget, because payments are due on the Beech Street Center debt.

The FY12 proposed and level service budgets are the same. There is a \$12,700 capital budget request for a 20% cost share grant for replacement of the Belderbus. The COA collected \$ 38,760 in receipts to cover “fee-for-service” expenses. Four grants supported COA activities totaling more than \$ 41,157 during the fiscal year.

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$346,778	
2011	\$353,966	6.9
2012		
Proposed Budget	\$354,905	6.9
Level Services	\$354,905	6.9
% change: FY2011–2012		
Proposed Budget	0.3%	0.0%
Level services	0.3%	0.0%
Average annual growth 2002-2011		
This department	0.2%	
All Belmont	3.9%	

Recent growth in operating budget and headcount are generally in-line with the town average.

Operating budget growth over the last ten years is below town average. Headcount has been constant but a closer look at overall program operations would be beneficial to discern how resources are used.

## Programmatic analysis

The COA offers services in eight programmatic areas. The COA has made progress in providing data for programmatic analysis, although the data is partial.

**Social services** are a core service offered by the COA. The nearly 1FTE devoted to this function serves on average 37.5 individuals per month. The services consist of consultations, evaluations, telephone inquiries and ongoing casework. Analysis of staff work is not a straightforward exercise and would require understanding of the subtleties of the work and the history of the department in previous years. A social work position has been consolidated and is now shared with the Health Department. In addition to the paid staff, there is a social work intern.

**Transportation** is the largest program budget of the COA, with roughly 38% of the budget and nearly 36% of the staff devoted to this program. More than 503 rides are given in a month with the daily average at 24.4 rides per day.

**The nutritional program** is administered by Springwell. It provided on average, 34 meals per day on site and 32 Meals on Wheels for the period where data was provided, start of the FY11 through present March 2011.

**Health wellness and enrichment, socialization, adult education and arts.** Roughly 30 users per day attend various programs in these areas. These services cover out of pocket costs; groups are organized using a fee for service approach in which the class instructor's offer classes at a discounted rate and the participant fees cover those modest costs.

**Volunteer programs.** 125 seniors or community volunteers provided time to the COA.

**Travel programs.** Outings are coordinated by the volunteer coordinator or volunteers and cover out of pocket costs..

**Beech Street rentals.** Rentals at the Beech Street Center has been added as a program function at the COA, with a budget of \$18,071.00 to cover marketing and coordinating rentals. The data provided indicates that with events to date and projections through the end of FY11 this endeavor will not generate revenues to cover identified expenses.

Beech Street Rental	Cost
6 Month expenses	\$9,035

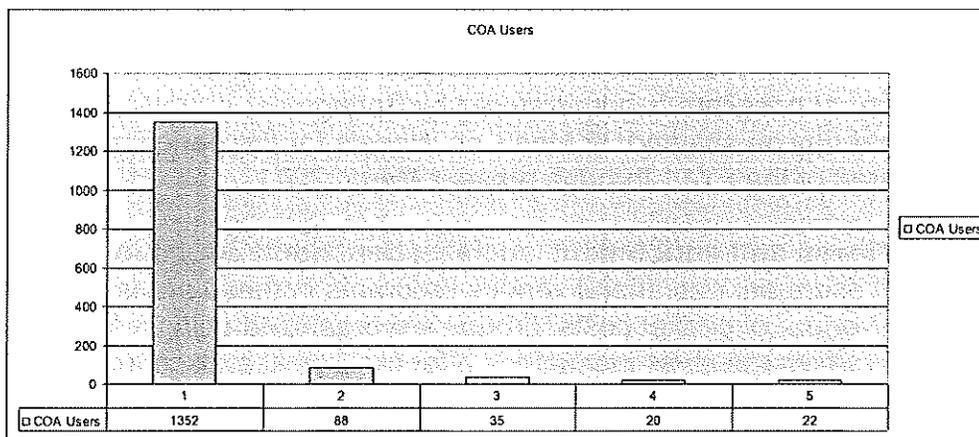
Rental revenue	\$1,585
Custodian service fee	\$2,250
Net revenue	(\$5,200)

### Expense analysis

With the exception of the new program area Beech Street Rentals (see the segment above), there were no programs that had increases above 5%.

### Long term and structural change issues

The number of persons using COA services and the frequency of use have been outstanding issues. The COA has started to keep track of information bearing on these issues, and the chart below begins to address them. The COA has approximately 1517 users that have been issued computerized cards.



**Number of Registered Users at the COA – Frequency of Use**

- 1352 of these checked in 1-50 times (Approx. 1 time per month)
- 88 of these checked in 51-100 times (Approx. 1 time per week)
- 35 of these checked in 101-150 times (Approx. 2 times per week)
- 20 of these checked in 151-200 times (Approx. 3 times per week)
- 22 of these checked in more than 200 times (Approx. everyday)

### Observations and recommendations

Some of the issues from the previous years remain, although data collection is improving. Despite the mission objectives, making the case with data is integral to solidify the effectiveness of the COA or for any Town department.

The cost to provide COA services needs to be evaluated in the context of the total cost to the Town. The extent to which services can be regionalized should be evaluated if the data indicates demand in Town is not sufficient to justify carrying the total cost. Alternatively, consolidating the Health Department, Recreation Department and COA under a single department head should be considered. Single managerial responsibility for "health and human services" functions within the Town may allow programs to focus on mission critical functions with overall managerial responsibilities uniformly applied under a single manager.

The COA should examine duplication of services offered by other town departments and local non-profits: library, computer lab, blood pressure, classes/courses, and transportation.

The issue of programs or services that receive subsidies without means testing has been raised annually. For the COA, participant cost sharing for meals, rides and certain additional service programs may put grants that cover some or all of those program costs in jeopardy. In the case of transportation, the COA may want to consider whether it would be more cost effective to forgo grant money and use a voucher system if the service could be provided on a regionalized basis

The cost of provided marketing and facility rental coordination should be offset by another department (Town Administrator) since this program is administered in an effort to avoid inconvenience rather than by design or mission focused.

The COA seeks to recover the direct costs of services only and does not seek to recover any operating costs of the center or COA administrative overhead costs.

## B. Health Department

### Description of department/mission

The primary goals of the Health Department are disease prevention and health promotion. The Health Department has four areas: public safety (animal control, emergency response and hazardous waste), inspections (food services, housing, swimming pools and day camps), social services (youth and family services and veterans services) and disease prevention (vaccination, anti-smoking and dental hygiene).

### Spending overview

	Proposed Budget	Level Services
Operating budget	\$405,824	\$404,211
Operating expenses	\$17,434	17,434
Capital budget	\$0	0
Debt repayment	\$0	0
Pension	\$84,024	84,024
Retiree medical	\$36,713	36,713
Survivor benefits	\$16,870	16,870

Total spending	\$560,865	559,252
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### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$300,322	
2011	\$422,304	4.85
2012		
Proposed Budget	\$405,824	4.85
Level Services	\$404,211	4.85
% change: FY2011–2012		
Proposed Budget	-3.9%	0.0%
Level services	-4.3%	0.0%
Average annual growth 2002-2011		
This department	3.9%	
All Belmont	3.9%	

### Programmatic analysis\*

#### a) Program and costs

Program	Budget \$	Budget %
Public Safety	\$94,049	23%
Inspections	\$94,049	23%
Social Services	\$74,148	18%
Disease Prevention	\$54,926	13%
Other	\$91,942	23%
Total	\$331,431	100%

\*Adds not incorporated unless material.

### Expense analysis

There are no items in this department's budget that increase by more than 5% from last year.

### Proposed cuts and adds

This department has a new director and a new assistant director which allowed for a savings in salaries. This, along with the two regionalized positions (see below), has allowed expenses to decrease.

### Long term issues

Scale continues to be an issue as this is a small department

### Observations and recommendations

Two items in this department were "regionalized" this year:

1. Sealer of weights and measures is now a shared position with Arlington
2. Council on Aging and Health share a social services provider, where in the past this was two positions.

Further regionalization and consolidation within the Town should be pursued.

### C. Library

#### Department Mission/Description of Services

The Belmont Public Library provides library services for the town consisting of circulation services (for material owned by Belmont and from other libraries in and out of network), adult/reference services (selecting and managing books, databases and other materials for the collections, addressing reference issues, initiating adult programs), young adult services (selecting materials for collections, assisting students in grades seven through high school, and initiating programs), children's services (same for up to grade six), and technical/processing services (handling acquisitions, repairs and maintaining holdings information).

#### Spending Overview

The Library's operating budget continues to account for approximately 85 percent of total spending.

	Proposed Budget	Level Services
Operating Budget	\$1,877,894	\$1,862,194
Capital Budget	\$0	\$0
Debt Repayment	\$0	\$0
Pension	\$257,889	\$257,889
Retiree Medical	\$54,200	\$54,200
Disability	Inc. Above	Inc. Above

Total	\$2,172,783	\$2,174,283
Revenue Offsets		
Fines	\$42,000	\$42,000
Lost Books	\$3,000	\$3,000
Copier Use	\$7,000	\$7,000
Total	\$,52,000	\$52,000

### Trends in Spending and Headcount

FTE counts have remained relatively constant during the past four years, generally between 23 and 24, and this trend continues in FY2012, with an estimated count of 23.36. These FTE's consist of 17 full-time staff, 4 permanent part-time staff who work 25 hours or more per week, 19 temporary part-time staff who work fewer than 20 hours per week, and 6 pages, who are temporary high school student employees.

The Library's operating budget has been more variable: since FY2008, annual growth has averaged 2.2 percent, however, year-to-year fluctuations have been as high as 6.4 percent and as low as -5.9 percent.

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$1,435,296	
2011	\$1,791,955	22.8
2012		
Proposed Budget	\$1,877,894	22.8
Level Services	\$1,862,194	22.8
% change: FY2011–2012		
Proposed Budget	4.8%	0.0%
Level services	3.9%	0.0%
Average annual growth 2002-2011		
This department	2.5%	
All Belmont	3.9%	

### Programmatic Analysis\*

#### a) Programs and Costs

Circulation Services accounts for the highest percentage of FTE's (29.6%) whereas the Adult Services program consumes the highest share of budget dollars (31.2%), with the difference due to the levels of staff working in each program. Young Adult Services is by far the smallest program with respect to both measures.

Program	FTE's	FTE %	Budget \$	Budget %
Administration	1.75	7.5%	\$274,245	14.7%
Adult Services	6.35	27.2%	\$580,644	31.2%
Young Adult Services	0.94	4.0%	\$63,566	3.4%
Children's Services	3.58	15.3%	\$282,418	15.2%
Circulation Services	6.92	29.6%	\$397,860	21.4%
Technical Services	3.82	16.4%	\$261,962	14.1%
Total	23.36	100.0%	\$1,860,694	100.0%

\*Adds not incorporated unless material.

b) Activity Indicators.

Key Library-Wide Activity Indicators		
Activity	FY2011 Estimate	FY2012 Estimate
Programming: # Attendees	9,000	9,050
Collection Development: # Items Acquired	13,000	14,000
Circulation: # Items Checked Out	545,100	546,000

**Expense Analysis\***

The following budget line items increased by more than 5%, and more than \$5,000, from the previous fiscal year.

Line Item	FY2011 Estimated	FY2012 Proposed Budget	FY2012 Level Services	Explanation
Health Insurance	\$156,674	\$177,584	\$177,584	Increased health insurance participation
New Acquisitions for	\$241,508	\$257,960	\$257,960	State requires 13.5 % of

Collection				budget to be spent on collection development. FY12 amount = 13.85%.
Computer Service	\$55,000	\$62,000	\$62,000	Replacement of 6-year-old server.
*Adds described separately below.				

**Proposed Cuts and Adds**

The proposed budget adds 14 additional Sunday openings and one additional hour to the 16 Sundays the Library is currently open.

**Long Term Issues**

While the Library operations involved relatively few personnel, they are in three unions (Librarians, Clerks and Custodial). This limits operational flexibility. Further, the Custodial union negotiates with the Board of Selectmen, not the Board of Library Trustees.

There is an ongoing question of how developments in technology will affect the provision of library services and the demand for library services.

**Observations and Recommendations**

The Library added 16 Sunday openings this year, and 13 more will be added in 2012. This is a long sought service enhancement.

Belmont is part of the Minuteman network. The Library borrowed almost 68,000 items through Minuteman in 2010 and loaned about 48,000.

**D. Recreation**

**Description of department/mission**

The Recreation Department's mission is to provide Belmont residents with healthy, enjoyable and affordable activities regardless of age, gender or physical ability. The department is operated by 3.9 FTE, approximately 128 seasonal employees, and volunteers within each program. The programs include Summer Pool Programs, School Year Programs, Summer Programs, Special Needs Program (SPOT), Skating Rink Programs and Spring Programs.

**Spending overview**

Proposed Budget	Level Services
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Operating Budget	\$677,300	\$677,300
Other Program costs (DPW, School Custodial, etc)	\$184,469	\$184,469
<b>Subtotal - Rec Department and Program Costs</b>	<b>\$861,769</b>	<b>\$861,769</b>

<i>Operating Expenses – building services **</i>	\$56,111	\$56,111
Office - 10% Homer	\$6,856	\$6,856
Capital Budget	\$0	\$0
Debt Repayment	\$0	\$0
Pension*	\$80,537	\$80,537
Disability	\$0	\$0
Retiree Medical	\$8,137	\$8,137
<b>Subtotal –</b>	<b>\$151,641</b>	<b>\$151,641</b>
<b>Total Expenses</b>	<b>\$1,013,410</b>	<b>\$1,013,410</b>

Revenue Offsets		
Fees	\$683,247	\$683,247

<b>Net Income/ Loss</b>	<b>\$178,522</b>	<b>\$178,522</b>
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\* This pension expense will be net of the reimbursement to the Town from the MA Teacher's retirement.

\*\* This expense is not updated but is carried forward from the 2011 Warrant Committee report, labeled as "building services".

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2010	\$642,586	16.06
2011	\$646,722	16.87
2012		
Proposed Budget	\$677,200	14.68
Level Services	\$677,200	16.87
% change: FY2011– 2012		
Proposed Budget	4.7%	-13.0%
Level services	4.7%	0.0%

Note: FTE includes full time, part time and seasonal

### Programmatic analysis

Program	Recreation Department Budget \$ (Level Service)	Recreation Department Budget + other Program Costs (Level Service)	Recreation Department Budget %
Summer Pool	\$136,355	\$205,924	20%
Summer Sports	\$139,570	\$139,570	21%
School Year	\$170,198	\$170,947	25%
Skating Rink	\$89,824	\$203,975	13%
Spring	\$68,206	\$68,206	10%
Special Needs	\$72,313	\$72,313	11%
Total	\$676,466	\$860,935	100%

### Expense analysis

#### Proposed cuts and adds

None.

#### Long term issues

. To avoid operating losses Belmont will need to increase program volume, provide additional value so fees can be increased, and/ or reduce controllable expenses. In Belmont, the schools also run recreation programs, fragmenting the offerings and the efficiency of total town recreation program administration.

The recreation offerings depend on the functioning of facilities that require significant investment to maintain. The department budget and program financials do not provide for capital improvement of the non-school facilities (pool and skating rink). However, the long term viability of these recreation programs requires addressing the need for capital improvements.

#### Observations and recommendations

The Level Service Budget and FY2011-FY2112 budget increase of approximately \$30K represents a change in policy by the School Department to recover incremental custodial fees required to support recreation programs. This is essentially a budget shift but not an increased expense to the town.

Consideration should be given to centralizing the administration of recreation programs across the town to one set of offerings, leveraging a common administrative department. This would increase the volumes and revenue supported by the fixed and expenses and offer a rationalized set of programs.

The departmental restructuring suggested last year (consolidating a number of small departments into a single department) should be considered to reduce overhead expense.

### **3. PUBLIC SAFETY**

Public Safety consists largely of two departments: the Police Department and the Fire Department. Overall, the Police and Fire Departments both represent areas of core services for the Town of Belmont. By their nature, both Departments require a minimum level of operating scale in order to perform effectively. For example, a minimum number of firefighters are required to staff each shift so that fifteen firefighters can be first responders to a fire or other emergency in less than four minutes.

Both Departments are staffed with highly trained and dedicated professionals. The challenge for a town of the size of Belmont is that our population is below the level that supports optimal staffing efficiency in some areas. This means that there are likely opportunities to gain scale economies if services could be combined with similar departments from nearby communities.

If Belmont seeks to maintain the high quality of our Public Safety departments and yet do so with greater efficiency, there is limited opportunity to save significant taxpayer dollars simply by cutting staffing or expense lines. As we enter the FY2012 budget cycle, regionalization of certain programs – such as Public Safety Communications, Fire Suppression, and Emergency Medical Services – will need to be seriously considered for implementation

#### **A. Fire Department**

##### **Description of department/mission**

The Belmont Fire Department (BFD) has four functional programs: Fire Suppression, Fire Prevention, Emergency Medical Services and Service Calls. The department's primary mission is Fire Suppression. Fire Prevention has a direct impact on the primary mission. The BFD also provides Rescue Services, the majority Emergency Medical calls, and responds to Service Calls.

Although there are four functional programs in the BFD, the budget is divided into three components: Administration, Fire Suppression and Emergency Medical Services (EMS). Fire Prevention is included in the Administration component of the budget.

##### **Spending overview**

Proposed	Level
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	Budget	Services
Operating Budget	\$5,153,070	\$5,153,070
Operating Expenses	\$101,000	\$101,000
Capital Budget	\$114,600	\$114,600
Debt Repayment	\$958,375	\$958,375
Pension	\$1,608,965	\$1,608,965
Disability	\$421,923	\$421,923
Retiree Medical	\$542,298	\$542,298
Total	\$8,900,231	\$8,900,231
Revenue Offsets	\$379,775	\$379,775

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$3,746,983	56
2011	\$5,094,730	55.49
2012		
Proposed Budget	\$5163870	55.49
Level Services	\$5,153,070	55.49
% change: FY2011–2012		
Proposed Budget	1.4%	0.0%
Level services	1.1%	0.0%
Average annual growth 2002-2012		
This department	3.23.5%	
All Belmont	3.9%	

### Programmatic analysis\*

	Budget \$	Budget %	FTE's
Fire Suppression	\$1,133,675	22%	5.49**
Fire Prevention	\$566,838	11%	
Rescue Services	\$2,421,943	47%	50***
Service Calls	\$1,030,614	20%	
Total	\$5,153,070	100%	55.5

\*Adds not incorporated unless material.

\*\*5.49 FTE's are allocated under Fire Administration

\*\*\*50 FTE's are allocated Fire Suppression/Rescue Services

## Activity Indicators\*

	<u>Calls</u>
Fire Incidents	164
Rescue Calls	1774
Hazardous Conditions	
200	
Service Calls	581
Good Intent Calls	304
<u>Alarm-Related Calls</u>	461
Total	3484
Permits Issued	656
Inspections Completed	146

## Expense analysis\*

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Actual	FY2012 Alternative Budgets		
		Available Revenue	Level Services	Override
FT Wages	2,871,026	2,889,653	2,889,653	\$
OT	\$331,122	\$382,879	\$382,879	\$
Occup Health Mgmt	\$2,500	\$10,000	\$10,000	\$
Medical Bills	\$15,000	\$21,000	\$21,000	\$

\* Adds are described separately below

## Proposed cuts and adds

The proposed budget includes an increase of \$10,800 from the initial available funds budget to cover increased fuel costs and computer maintenance.

## Long term issues

Regionalization – Although the BFD supports sharing resources with surrounding communities (mutual aid) and regionalization, little progress has been made to date beyond shared Fire and Police communications. Representative Brownsberger, however, has identified possible grant funding from the Metropolitan Area Planning Council (MAPC) for Belmont and Watertown to study regional EMS and dispatch. Both communities are in the process of submitting the grant application.

With a town of less than 25,000 people and the service delivery requirement of having a minimum number of staff in order to respond to a potential fire 24/7, Belmont is simply subscale. Real savings will only be realized through regionalization of Fire Suppression and EMS, not just dispatch. Resolving the longstanding question of regionalization of the BFD will require strong leadership from the Board of Selectmen, the Fire and Police chiefs and neighboring towns.

Fire Prevention – Stringent building codes, inspections, smoke detectors and Fire Prevention have drastically reduced the number of actual fires. The BFD is staffed to be fully prepared to address fire and other emergencies 24 hours a day. The challenge is to maintain a force to adequately respond to a major fire, despite the low frequency. This calls for regionalization.

### **Observations and recommendations**

Ambulance Rate Structure – The Board of Selectmen (BOS) voted to increase the ambulance rate structure. The initial estimated increase in revenue for FY12 is \$ 300,000.

EMS – The BFD operates Basic Life Support (BLS) Ambulance services and contracts for Advanced Life Support (ALS) services with a private vendor. The BFD has repeatedly suggested that adding ALS would improve service, resulting in a net financial gain to the town. The issue has been analyzed in the past, but a disagreement remains whether the increased fees from ALS will be covered by the increases stipends, training, and possible additional equipment required. A decision should be made.

Injured on Duty/Sick Leave – Over the last several years, Injured on Duty and Sick Leave is averaging overall around 5% in the BFD, which is significantly higher than other town departments. It also increases the use of overtime (OT), the least efficient and most expensive staffing model. The Fire Chief and the Police Chief will be hiring an outside contractor to assist them in managing injured on duty and sick leave issues. We applaud that effort.

Staffing – The BFD has 55.49 Full-Time Equivalents (FTEs). 5.49 FTEs are assigned to Administration and Fire Prevention and 50 FTEs are assigned to Fire Suppression and EMS. There is no specific allocation of the Fire Suppression and EMS staffing this year, even though such an allocation has been included in the BFD budget historically. Addition of this allocation would allow more meaningful program budgeting.

Retiree Health and Pension Costs – The BFD retiree health and pension costs respectively are 37% and 32% of the town-side department's overall costs.

## B. Police

### Description of department/mission

The Police Department is comprised of seven different Divisions: Administration, Patrol, Detective, Traffic, Records, Community Services and Joint Public Safety Communications. Each division provides a different function within the department to complete the mission of the Department, which is to best serve the community.

### Spending overview

	<b>Proposed Budget</b>	<b>Level Services</b>
Operating Budget	\$6,374,031	\$6,351,372
Operating Expenses	\$57,288	\$57,288
Capital Budget	\$24,100	\$24,100
Debt Repayment	\$0	\$0
Pension	\$1,993,012	\$1,993,012
Disability	\$248,039	\$248,039
Retiree Medical	\$438,417	\$438,417
Total	\$9,112,228	\$9,112,228
Revenue Offsets (fines)	\$301,686	\$301,686

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$4,317,952	52
2011	\$6,178,078	46*
2012		
Proposed Budget	\$6,374,031	46*
Level Services	\$6,351,372	46*
% change: FY2011– 2012		
Proposed Budget	3.2%	!Zero Divide
Level services	2.8%	0%
Average annual growth 2002-2011		
This department	4.1%	
All Belmont	3.9%	

\*Headcount in this section only includes sworn officers.

### Programmatic analysis

Budget \$	Budget %	FTE's
-----------	----------	-------

Administration	\$410,774	6.5%	3
Patrol	\$3,896,256	61.3%	35
Detective	\$449,496	7.0%	5
Traffic	\$440,260	7.0%	12
Records	\$83,184	1.3%	2
Community Service	\$254,811	4%	3
Joint Public Communication	\$816,591	12.9%	10
Total	\$6,351,372	100%	70**
Sworn officers			46

\*Adds not incorporated unless material.

### Activity Indicators

	Highlights of Calls for <u>Service</u>
Medical	1,094
Alarms	836
Accidents	664
Domestic	328
911	250
Theft	227
Break	217
Vandalism	185

The BPD made 17,328 total calls for service in 2010.

### Expense analysis

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Actual	FY2012 Alternative Budgets		
		Available Revenue	Level Services	Override
Benefits	\$717,112	\$754,805	\$754,805	
Personnel Overtime	\$268,333	\$336,757	\$336,757	
Capital – Cruiser	\$80,000	\$120,000	\$80,000	
Part-time Employees	\$215,000	\$231,653	\$231,653	

## **Proposed cuts and adds**

Two items were added to this budget from new revenues: additional monies were added in anticipation of rising fuel costs and “mug shot capture” system to allow better visual identification of suspects. This Level Service budget calls for replacement of three police cruisers but a third cruiser was not restored.

## **Long term issues**

The Police Department has joined together with the Fire Department and has chosen to hire an outside consulting firm to help review and monitor the impact of “injured on duty” (IOD). IOD negatively impacts department staffing and overtime and translates into increased pension and disability costs for the Town.

## **Observations and recommendations**

Programmatic Analysis –Data points for the police department are clear and tracked in detail. Data statistics are kept on more than 245 types of crimes as promulgated by the Federal Bureau of Investigation and the Commonwealth of Massachusetts guidelines for cities and towns. There has been a modest increase in non-violent crimes that the department finds consistent with an economic downturn. The department is operated efficiently.

Administration – The Administration program costs should be spread across the remaining six programs: Patrol, Detective, Traffic, Records, Community Service and Joint Public Communication.

Regionalization – The Police Department is part of a regional organization NEMLEC, the North Eastern Massachusetts Law Enforcement Council, composed of a consortium of 53 police and sheriff departments in Middlesex and Essex Counties. Member agencies operate pursuant to an interagency mutual aid and assistance agreement.

The Department is also a member of an 8-member Regional Drug Task Force that works collaboratively to combat drug activity. In addition, the BPD partnered with the Arlington and Cambridge Police Departments, along with 24 other private and public agencies to combat Domestic Violence, especially high-risk cases forming the CAB HART ( Cambridge/Arlington/Belmont – High Risk Assessment) Team. Some federal and state agencies have viewed this as a model program.

The department should continue to explore regionalization opportunities, especially as it relates to regionalization of Fire Suppression and EMS.

Part Time Positions – Consideration should be given to modify staffing of part-time ticket clerks to eliminate the benefit and pension financial exposure to the town for these

positions, regardless of the number of employees actually accepting these benefits at this time.

## 4. BUILDING SERVICES

### Description of department/mission

Building Services is responsible for maintenance, cleaning, and repair of the following Town buildings including the Police Station, Town Hall, Homer Bldg, Old BMLD Bldg, the Fire Stations, the Town Yard, the Benton Branch Library (but not the Main Library) and the Beech Street Center.

Building Services also assists with oversight of Town capital projects.

### Spending Overview

	Proposed Budget	Level Services
Operating budget	\$1,137,189	\$1,108,979
Capital budget	\$200,000	\$200,000
Debt repayment	\$0	\$0
Pension	\$27,086	\$27,086
Retiree medical	\$14,780	\$14,780
Utility and maint. costs	NA	NA
 Total spending	 \$1,439,148	 \$1,439,148
 Revenue Offsets Beech St. Center		

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2001	\$400,226	
2011	\$1,137,189	6.6
2012		
Proposed Budget	\$1,137,189	6.6
Level Services	\$1,108,979	6.6
% change: FY2011–		

2012		
Proposed Budget	0.0%	0.0%
Level services	-2.5%	0.0%
Average annual growth 2001-2011		
This department	11.0%	
All Belmont	3.7%	

### Programmatic analysis

As suggested by its name, Building Services has one major programmatic activity: the maintenance and repair of the town's buildings and building systems. Its other major activity, assistance and troubleshooting on building projects accounts for less than 10% of staff time; any out of pocket expenses are born by the building funds of the respective projects.

### Expense analysis

The following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Actual	FY2012 Alternative Budgets		
		jProposed	Level Services	Override
Telephone	\$35,000	\$45,000	\$45,000	NA

### Proposed cuts and adds

A sum of \$19,692 to support increase in fuel prices, and \$10,200 to allow the installation of a new and more efficient boiler for the Homer Building have been added to the initial level service budget.

### Long term issues

The Town Meeting vote to allow consolidation of town and the school departments has resolved the major long term issue.

## Observations and recommendations

FY2012 will be a year of considerable transition as the consolidated building services plan is developed.

## 5. COMMUNITY DEVELOPMENT

### Department Mission/Description of Services

The Community Development Department is responsible for three functions. Its Planning division provides professional planning services, project related services, and staffing of Town committees, and public information services. The Engineering Services division designs, reviews, implements and provides permanent record keeping of infrastructure improvement programs, including major road reconstruction and sanitary sewer and storm drain repairs. The Inspection Services division reviews permit applications and issues building, zoning and other land use permits; investigates and follows up on building code, zoning code and general by-law violations; conducts inspections required for various certificates; and reviews and issues gas and plumbing permits. The Town Engineers serves as the head administrator of the department.

### Spending Overview

	Proposed Budget	Level Services
Operating budget	\$905,224	\$900,224
Capital budget	\$0	
Debt repayment	\$0	
Pension	\$66,206	\$66,206
Retiree medical	\$8,054	\$8,054
Utility and Maint. Costs	NA	NA
Total	\$974,484	\$974,484

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2001	\$663,332	
2011	\$901,961	8.97

2012		
Proposed Budget	\$905,224	8.97
Level Services	\$900,224	8.97
% change: FY2011–2012		
Proposed Budget	0.4%	0.0%
Level services	-0.2%	0.0%
Average annual growth 2001-2011		
This department	3.1%	
All Belmont	%	N/A

### Programmatic Analysis\*

#### b) Programs and Costs

Planning accounts for the largest share of staff time (33%), and Administration accounts for the largest share of budget dollars (\$270,415) for this department. Plumbing and gas inspection services are shared with the Town of Watertown.

<u>Program</u>	<u>Budget \$</u>	<u>Budget %</u>
Administration	\$270,415	30%
Planning	\$257,019	29%
Engineering Services	\$145,753	16%
Inspection Services	\$227,037	25%
Total	\$900,224	100%

\*Adds not incorporated unless material.

Administration, Engineering, and Inspections are staffed with 6.9 FTEs.

Planning is made up of 3 FTE's: a Planning and Economic Development Manager, Senior Planner, and Administrative Assistant. Planning reports to the Town Administrator, not the Community Development head.

### Expense Analysis

There are no budget line items which increase by more than 5% from FY2011's Estimated Expenses.

## **Proposed Cuts and Adds**

A sum of \$5000 for the purchase of "toughbook laptops" which will allow inspectors to work in the field thus improving productivity.

## **Long term issues**

Adequate engineering oversight of public infrastructure projects has been difficult with current staffing levels. With projects, e.g., street repaving, water lines, sewer lines, supposed to last for many decades, it does not seem wise to neglect close supervision of contractors.

The Economic Development Manager reports to the Town Administrator rather than to the head of Community Development, which makes the department more difficult to manage. This chain of command should be explored.

## **Observations and Recommendations**

The costs of permits and the fees for planning, zoning and other applications should be explored to ensure they are in line with surrounding, similar municipalities and to ensure they are covering the actual costs associated with processing and advertising, as well as for possible peer reviews.

Grants for planning should be explored and applied for.

The philosophical question as to whether the Town should regionalize its planning function, or hire consultants for individual projects, zoning amendments and long-range plans is worthy of discussion. More emphasis on bringing additional economic development to the Town should be explored.

The department is exploring entering into contracts which would link the amount of the payment to the quality of the work provided to improve the overall quality of public projects.

Purchase of a document imaging system for historical Town engineering, permitting and other documents would enable the documents to be more available to the public and to potential developers. While staff would be required to scan and organize the documents, it would be a discrete, temporary job. Community Preservation Act funds could be explored for this purpose.

While the department processes 78% of building permit applications within 5 days and 83% in 10 days, extending such dates slightly would free up the inspectors to conduct more enforcement. Increased enforcement would lead to greater safety, more compliance and increased revenue from fines.

The department is commended for maintaining level services in FY2012 within available funds budget and with decreased budget from FY2011.

## 6. PUBLIC WORKS

### Description of department/mission

The Department of Public Works (DPW) provides a wide variety of key Town services including street and sidewalk maintenance; snow removal, vehicle fleet maintenance, forestry, grounds and delta maintenance, solid waste collection and disposal, street lighting, parks and playing fields maintenance, cemetery maintenance, water and sewer maintenance and construction. It is the sole department in Belmont whose activities touch every resident, every day.

### Spending overview

	Proposed Budget	Level Services
Operating budget	\$6,318,156	\$6,280,509
Capital budget	\$13,500	\$13,500
Debt repayment—water	\$421,358	\$421,358
Debt repayment—sewer	\$859,287	\$859,287
Debt repayment—other		
Pension	\$938,614	\$938,614
Retiree medical	\$288,831	\$288,831
Utility and maint. costs	\$37,509	\$37,509
Total spending	\$8,877,255	\$8,839,608
Revenue offsets (permits)	\$55,000	\$55,000

Excluding debt repayment for water and sewer which are capitalized into the rates for water and sewer, the operating budget accounts for 83% of total spending on this function.

### Trends in Spending and Headcount

Fiscal Year	Operating budget	Headcount (FTE)
2002	\$5,275,022	
2011	6,259,589	51
2012		
Proposed Budget	\$6,318,156	50.6
Level Services	\$6,280,509	50.6

% change: FY2011– 2012		
Proposed Budget	0.9%	-0.8%
Level services	0.3%	-0.8%
Average annual growth 2002-2011		
This department	1.9%	
All Belmont	4.7%	

Expense growth in this department has been significantly below the town average over the long term.

### Programmatic analysis\*

#### a) Programs and costs

Program	Budget \$	Budget %
Cemetery Maintenance	\$438,004	4.3%
Central Fleet Maint - Highway Facilities	\$523,956	5.2%
Delta & Grounds Maintenance	\$58,540	0.6%
Forestry Service	\$238,435	2.4%
Parks & Facilities	\$681,415	6.7%
Snow Removal	\$552,373	5.5%
Solid Waste Collection & Disposal	\$2,519,615	24.9%
Street Lighting	\$308,875	3.1%
Street Maintenance	\$649,630	6.4%
Water Distribution	\$1,936,772	19.1%
Water Main Replacement	\$0	0.0%
Sewer Maintenance	\$1,819,568	18.0%
Stormwater Maintenance	\$394,225	3.9%

Solid waste collection has been contracted out; thus staff time is largely spent on water, sewer, and street, park, and facilities maintenance.

\*Adds not incorporated unless material.

### Expense analysis

The only expense item to increase by more than 5% is the allocation for tree planting.

### Proposed cuts and adds

Sidewalk repair was funded from the capital budget. A sum of \$10,000 was added to support tree planting, \$6655 for vehicle maintenance and \$21,755 to cover anticipated fuel cost increases.

## Long term issues

Lack of funding for adequate maintenance/replacement of many town facilities continues to take a toll on the quality of town services. Examples include roads, sidewalks, trees, and tennis courts. The Underwood pool and the Skip Viglirolo Skating Rink are past their useful lives.

## Observations and recommendations

A street opening coordinator was hired, with the position funded by fees. This will hopefully improve the condition of streets when work is completed.

The town should review whether fees charged for town services are too low when the services compete directly with private tradesmen. Of particular concern are fees for services that are currently set at zero. One example is a service call to rod out tree roots in a homeowner's sewer line.

Another potential fee opportunity is residential yard waste pick-up. This activity costs the town more than \$300,000 annually and competes with private landscapers. It is worth investigating whether a charge should be assessed to help defray this expense.

Recycling is approximately \$40/ton cheaper than regular trash disposal. An increased education campaign should be considered to encourage more recycling.

The department is commended for maintaining level services within the available funds budget.

## 7. MINUTEMAN

### Description of department/mission

Minuteman is a career and technical high school that provide carrer education to students from Belmont and 15 other member towns. Minuteman also offers a variety of separately-funded middle school, summer, and community education programs.

The mission of Minuteman is to serve a diverse student body with multiple learning styles and develop the academic, vocational and technical skills necessary to become productive members of a global community.

### Spending overview

FY2012 Proposed      % change

	FY2011		FY 2011
Minuteman	\$16,258,679	\$16,435,472	1.1%
Belmont Assessment	\$751,311	\$880,134	17.1%

### Belmont assessment

For FY 2012, despite just a 1.1% increase in the Minuteman budget, Belmont's assessment is projected to increase by \$128,823, or 17.1%. This increase is attributable to two primary factors. More than half of the increase (\$72,684, or 9.7% of the 17.1%) is the result of an underassessment, or windfall, that Belmont enjoyed in FY 2011. That underassessment was the result of the State not finalizing the required minimum contributions until after Belmont and the other Minuteman towns had approved the Minuteman budget and assessment at their respective town meetings. The remainder of the projected FY 2012 assessment to Belmont is driven by an increase in Belmont's FY 2011 enrollment from 33 to 41.

### Programmatic analysis

Minuteman's planning and budgeting process does not provide programmatic data comparable to Town data.

### Expense analysis

The Minuteman administration lowered operating expenses over the past few years.

Consequently, Minuteman's per-pupil expenditures have gone from being among the highest in the State to now being close to the State average for regional career and technical high schools.

Excluding those line items that simply represent a change in budget classification, the following budget line items increased by more than 5% from the previous fiscal year and also had increases greater than \$5,000.

Item	FY2011 Budget	Proposed Budget	Level Services
Health (Active Employees)	1,460,756	1,547,101	1,547,101
Health (Retirees)	604,646	725,400	725,400
Medicare	151,070	165,000	165,000
Transportation	1,208,080	1,272,662	1,272,662
Heating	120,000	180,000	180,000
Electric	195,000	400,000	400,000
ESCO Lease	275,000	411,273	411,273
Debt Service	0	20,000	20,000

Health insurance costs for current employees and retirees were originally anticipated to increase by 10% based on the initial quotes from the insurance carrier. Since the FY 2012 budget was prepared, these cost increases have actually been limited to only 1.6%. The increase in Medicare expenses is the result of a continued decline in senior staff and their replacement with younger employees. The increase in transportation costs reflects a fixed escalation in the second year of a three-year bus contract, plus a fuel escalation charge due to a projected increase in fuel prices above a base index in the contract. The increase in heating and electric costs is largely attributable to an under-budgeting of FY 2011 expenses.

### **Proposed cuts and adds**

Minuteman is not proposing any increases to its programs in FY 2012.

### **Long term issues**

Minuteman continues to focus on managing a number of issues all of which revolve around the theme of providing a robust career and technical education program in the most cost-efficient manner possible. Many of the specific issues that Minuteman is addressing are interrelated. These issues include:

Right sizing. In addition to trying to improve efficiencies through cost reductions, Minuteman is also making a concerted effort to increase enrollment. Total enrollment, which was as high as 926 students in 1996, declined to less than 700 by 2008. By 2010, enrollment had recovered to 754. This increase in enrollment has been driven by a 63% increase in the size of the FY 2011 freshmen class (from 113 to 184) and a 50% increase (from 80 to 120) in FY 2011 post-graduate enrollment. While some of this increase has come from member towns, a significant portion has come from non-member towns.

Building Renovation. Minuteman has long-term capital equipment and facility needs, as confirmed by the Massachusetts School Building Authority (MSBA). Before proceeding with a building renovation, Minuteman is undertaking three analyses including an enrollment study in order to project future enrollment from both member and non-member towns. This study is currently underway and is expected to be available for review shortly.

Changes in Regional Agreement. A Regional Agreement Task Force (RATF) was formed in January, 2010 to examine the Regional Agreement and its impact on member and non-member enrollment and on the current allocation of capital and operating costs among member towns, and to consider potential options for changing the current formulas.

Program Mix. Undertaking assessments of the mix of the menu of career and technical programs offered to Minuteman students is an on-going activity. The need for this

assessment is made particularly acute as decisions are potentially being made regarding a new facility.

Financial Controls. Minuteman has made great strides over the past few years in improving its internal financial controls. However, continued improvements in this area are still required.

### **Observations and recommendations**

Continued, careful monitoring of the Minuteman administration's progress towards improving operating efficiencies and administrative controls; increasing enrollments; potentially admitting new towns to the consortium; revisiting the mix of career and technical programs; considering changes to the Regional Agreement; and contemplating plans for a new/renovated facility is required.

## **8. EDUCATION**

### **Description of Department/Mission**

The School Department, the largest of the town's departments is responsible for K-12 education of all Belmont children and for pre-kindergarten services to children with special needs. In addition to its core classroom education, it also provides Belmont students with a wide array of physical, social, cultural, and service opportunities. It aims to prepare student for further academics, citizenship, employment and lifelong learning.

### **Spending Overview**

The School Department originally presented three operating budgets for Fiscal Year 2012: an Available Funds budget of \$40.6 million, a Level Services budget of \$42.7 million and a Mission Critical budget of \$43.5 million. The Available Funds Budget reflected anticipated FY2012 revenues, the Level Services Budget included amounts considered necessary to provide the same services as in FY2011, and the Mission Critical Budget contained additional items seen as critical to sustain current systems, structures, and programs.

Because of increases in State aid and circuit breaker reimbursement, as well as savings achieved by the entire Town in health insurance and electricity costs, a new budget was developed in late April that restores many of the cuts contained in the Available Funds Budget. This is the budget that will be presented to Town Meeting in May.

The increases reflected in the final budget include some \$1,002,800 in additional State aid, a \$150,000 increase in projected town revenues, and \$82,900 in projected cost savings to the town that are being allocated to the schools, less a decrease in the assessor's overlay surplus of \$225,000. The resulting total of \$1,010,700 has been added to the school's operating budget. In addition, state circuit breaker funding is now projected to rise by \$400,000, and a corresponding amount has been moved from the general funds budget to the grants budget; also, the School Department expects to achieve its own cost savings in the amount of \$182,200. While these amounts have not been added to the operating budget, they do free up already budgeted funds for reallocation. In total, these changes have yielded \$1,592,900 that is being used to restore programs that had previously been cut.

With this new funding, the FY2012 operating budget will account for almost 86.7% of the total education budget, up from 84.9% in FY2011. Expenditures that support education but are outside the school's operating budget include repayment of debt, certain town services (provided largely by General Government, Public Safety, and Public Works), retirement costs for non-teacher employees, the Minuteman assessment, and federal stimulus grants. Two of these categories, debt repayment and federal grants, are expected to decrease in FY2012. The Town also receives revenue, primarily from Chapter 70 state aid, school construction reimbursement, and athletic and student activity fees. Total revenue offsets are expected to be \$6.32 million in FY2012, slightly down from this past year's \$6.34 million.

	FY2011 Budget	FY2012 Budgets		
		Initial Available Funds	Level Services	Proposed
Operating Budget *	\$39,702,570	\$40,574,854	\$42,652,566	\$41,575,783
Temporary stimulus grants allocated to operating budget	\$832,134	\$154,679	\$154,679	\$154,679
Operating Expenses, Other Town Depts.				
General Government	\$455,659	\$462,072	\$462,072	\$462,072
Public Safety	\$107,810	\$113,386	\$113,386	\$113,386
Public Works	\$258,360	\$252,321	\$252,321	\$252,321
Operating Budget, Minuteman and Charter	\$751,311	\$888,119	\$888,119	\$888,119
Pension and other employee benefits	\$716,375	\$716,375	\$716,375	\$716,375
Disability	Inc. above	Inc. above	Inc. above	Inc. above
Capital Budget	\$617,381	\$609,000	\$609,000	\$609,000
Debt Repayment (capital & interest)	\$3,337,450	\$3,194,788	\$3,194,788	\$3,194,788
<b>Total</b>	<b>\$46,779,050</b>	<b>\$46,965,594</b>	<b>\$49,043,306</b>	<b>\$47,966,523</b>
Operating Budget as % Total Costs	84.9%	86.4%	87.0%	86.7%
Revenue Offsets				
Chapter 70	\$5,541,573	\$4,744,000	\$4,744,000	\$5,571,323
School Construction	\$382,498	\$382,498	\$382,498	\$382,498
Charter School Assessment Reimb.	\$10,551	\$0	\$0	\$0
Medicaid Reimbursement	\$0	\$0	\$0	\$0
Athletic and Student fees **	\$402,822	\$342,850	\$369,850	\$369,850

Total \$6,337,444 \$5,469,348 \$5,496,348 \$6,323,671  
 \* Includes post-employment medical expenses of \$1,533,162 for FY11 and \$1,643,079 for FY12  
 \*\* FY11 amount includes \$42,281 in donations.

### Trends in Spending and Headcount

During the past four years, average growth in the school operating budget has generally outpaced the growth in student enrollment, as well as budget growth for other town departments. Using the final proposed FY2012 budget, over the last decade the operating budget has grown at a compounded annual rate of 4.25%, which is above the overall town rate of 3.52%. (The latter rate is for the entire Town, the compounded annual growth rate for the town ex school operating budgets has been 2.70 %.)

#### Growth in Enrollment and Operating Budget: FY2008 – FY2012

Fiscal Year	Enrollment	% Incr.	Operating Budget	% Incr.
2008 Actual Exp.	3,831	-----	\$37,205,025	-----
2009 Actual Exp.	3,945	3.0%	\$38,470,916	3.4%
2010 Actual Exp.	4,060	2.9%	\$37,824,011	-1.7%
2011 Budget	4,016	-1.1%	\$39,702,570	5.0%
2012 Proposed Budget	4,034	0.4%	\$41,575,783	4.7%

Note: The FY10 and FY11 numbers do not include federal stimulus funds.

	Fiscal Year	Annual Growth Since 2002 Operating Budget	Annual Growth
Education	2002	\$27,411,644	-----
	2012	\$41,575,783	4.25%
All Belmont	2002	\$61,284,641	-----
	2012	\$86,608,719	3.52%

### Programmatic Analysis

The Warrant Committee has sought to have all budgets, including the school budget, presented on a programmatic basis so that it will be easier to understand how much (including underlying support costs) is being spent on each program within the budget. For FY2011, the School Department identified ten program components that make up the school's budget. This presentation was conceptual, however, and the operating

budget was not allocated among the programs. In this year's submission, the Department has organized its budget into 38 programmatic, administrative, and support categories. This program allocation is presented for the FY2011 Budget and the final FY2012 Proposed Budget in the table that follows.

Program/Budget Category	FY2011 Budget			FY2012 Proposed Budget			
	FTE's	FTE %	Budget \$	FTE's	FTE %	Budget \$	
<b>Regular Instruction</b>							
English	23.75	5.8%	\$ 1,541,999	24.40	6.0%	\$ 1,640,459	3.9%
Reading	8.50	2.1%	\$ 616,838	10.20	2.5%	\$ 741,363	1.8%
Elementary	56.00	13.7%	\$ 4,004,496	65.26	16.0%	\$ 4,415,319	10.6%
Fine Arts	1.30	0.3%	\$ 120,124	1.30	0.3%	\$ 133,543	0.3%
Art	10.10	2.5%	\$ 715,875	9.49	2.3%	\$ 730,882	1.8%
Music	8.90	2.2%	\$ 713,312	10.00	2.4%	\$ 772,502	1.9%
Theater Arts	-	-	-	-	-	-	-
Kindergarten	10.50	2.6%	\$ 706,097	10.50	2.6%	\$ 695,090	1.7%
Math	24.55	6.0%	\$ 1,713,164	25.60	6.3%	\$ 1,789,224	4.3%
Physical Education	7.60	1.9%	\$ 571,187	7.55	1.8%	\$ 551,200	1.3%
Science	26.45	6.5%	\$ 1,819,065	24.20	5.9%	\$ 1,760,788	4.2%
Health Education	2.00	0.5%	\$ 112,628	2.20	0.5%	\$ 132,424	0.3%
Technology Education	0.85	0.2%	\$ 54,367	0.80	0.2%	\$ 64,821	0.2%
Social Studies	24.35	6.0%	\$ 1,670,168	25.60	6.3%	\$ 1,758,631	4.2%
Foreign Language	16.80	4.1%	\$ 1,193,537	17.45	4.3%	\$ 1,211,141	2.9%
<b>Subtotal</b>	<b>221.65</b>	<b>54.4%</b>	<b>\$ 15,552,857</b>	<b>234.55</b>	<b>57.5%</b>	<b>\$ 16,397,384</b>	<b>39.4%</b>
<b>Special Instruction</b>							
English Language Learners	5.61	1.4%	\$ 222,363	3.95	1.0%	\$ 184,441	0.4%
Pre-Kindergarten	13.09	3.2%	\$ 566,539	14.26	3.5%	\$ 633,397	1.5%
Special Education	73.57	18.0%	\$ 7,871,508	63.82	15.6%	\$ 8,408,462	20.2%
<b>Subtotal</b>	<b>92.27</b>	<b>22.6%</b>	<b>\$ 8,660,410</b>	<b>82.03</b>	<b>20.1%</b>	<b>\$ 9,226,299</b>	<b>22.2%</b>
<b>Student &amp; Instructional Services</b>							
Athletics	0.90	0.2%	\$ 230,775	1.00	0.2%	\$ 249,801	0.6%
Student Activities	0.20	0.0%	\$ 24,193	0.25	0.1%	\$ 38,128	0.1%
Guidance	11.60	2.8%	\$ 801,089	10.60	2.6%	\$ 756,047	1.8%
Psychological Services	2.73	0.7%	\$ 218,891	3.73	0.9%	\$ 276,722	0.7%
Health Services	7.20	1.8%	\$ 473,692	7.50	1.8%	\$ 506,058	1.2%
Library	2.92	0.7%	\$ 189,022	3.03	0.7%	\$ 199,977	0.5%
Technology & AV	9.28	2.3%	\$ 873,379	9.50	2.3%	\$ 1,017,131	2.4%
Curriculum Development	1.00	0.2%	\$ 103,172	0.80	0.2%	\$ 89,550	0.2%
Staff Development	1.00	0.2%	\$ 217,034	0.80	0.2%	\$ 201,912	0.5%
Substitutes	-	0.0%	\$ 320,000	-	0.0%	\$ 370,000	0.9%
Transportation (Reg. Ed.)	-	0.0%	\$ 148,630	-	0.0%	\$ 71,610	0.2%
<b>Subtotal</b>	<b>36.83</b>	<b>9.0%</b>	<b>\$ 3,599,877</b>	<b>37.21</b>	<b>9.1%</b>	<b>\$ 3,776,935</b>	<b>9.1%</b>

Program/Budget Category	FY2011 Budget				FY2012 Proposed Budget			
	FTE's	FTE %	Budget \$	Budget %	FTE's	FTE %	Budget \$	Budget %
<b>Operations</b>								
Buildings & Grounds	5.00	1.2%	\$ 686,676	1.7%	5.00	1.2%	\$ 695,161	1.7%
Custodial Services	14.00	3.4%	\$ 1,006,376	2.5%	14.00	3.4%	\$ 1,040,635	2.5%
Utilities	-	0.0%	\$ 1,409,851	3.6%	-	0.0%	\$ 1,536,031	3.7%
<b>Subtotal</b>	<b>19.00</b>	<b>4.7%</b>	<b>\$ 3,102,903</b>	<b>7.8%</b>	<b>19.00</b>	<b>4.7%</b>	<b>\$ 3,271,826</b>	<b>7.9%</b>
<b>Leadership &amp; Administration</b>								
Building Administration	29.77	7.3%	\$ 1,909,717	4.8%	29.02	7.1%	\$ 1,903,767	4.6%
Central Administration	8.10	2.0%	\$ 752,446	1.9%	6.40	1.6%	\$ 741,112	1.8%
Legal Services	-	0.0%	\$ 105,000	0.3%	-	0.0%	\$ 105,000	0.3%
School Committee	-	0.0%	\$ 19,600	0.0%	-	0.0%	\$ 19,600	0.0%
<b>Subtotal</b>	<b>37.87</b>	<b>9.3%</b>	<b>\$ 2,786,763</b>	<b>7.0%</b>	<b>35.42</b>	<b>9.6%</b>	<b>\$ 2,769,479</b>	<b>6.7%</b>
<b>Allowances &amp; Benefits</b>								
Contractual Allowances	-	0.0%	\$ 208,593	0.5%	-	0.0%	\$ 208,593	0.5%
Fringe Benefits	-	0.0%	\$ 5,791,167	14.6%	-	0.0%	\$ 5,925,266	14.3%
<b>Subtotal</b>	<b>-</b>	<b>0.0%</b>	<b>\$ 5,999,760</b>	<b>15.1%</b>	<b>-</b>	<b>0.0%</b>	<b>\$ 6,133,859</b>	<b>14.8%</b>
<b>Grand Total</b>	<b>407.62</b>	<b>100.0%</b>	<b>\$ 39,702,570</b>	<b>100.0%</b>	<b>408.21</b>	<b>100.0%</b>	<b>\$ 41,575,783</b>	<b>100.0%</b>

## Expense Analysis

To identify significant budget increases contained in the FY2012 budget, we employed thresholds of both 5% and \$5,000. Our review identified 63 line items that have either increased by at least these amounts or are greater than \$5,000 after having received no funding in FY2011. The line items listed below represent the largest such increases, ranging from a high of \$579,452 for Private Special Education Placement Tuitions to a low of \$51,224 for High School Music Teacher Salaries.

Line Item	FY2011 Budget	FY2012 Budget	Increase	Percent Increase
Special Education - Private Tuitions	\$1,500,096	\$2,079,548	\$579,452	54.5%
Fringe Benefits - Retiree Health Insurance	\$1,533,162	\$1,639,726	\$106,564	12.6%
Special Education – MA Tuitions	\$249,836	\$344,460	\$94,624	53.7%
Special Education - Transportation	\$711,400	\$807,000	\$95,600	13.4%
Middle School Psychologist	\$0	\$94,388	\$94,388	NA
Winn Brook Elementary Teacher Salaries	\$1,079,733	\$1,162,240	\$82,507	7.6%
Wellington Elementary Teacher Salaries	\$1,013,557	\$1,089,240	\$75,683	7.5%
Butler Elementary Teachers Salaries	\$933,992	\$1,001,642	\$67,650	7.2%
Wellington Utilities - Natural Gas *	\$0	\$59,213	\$59,213	NA
High School English Teacher Salaries	\$705,690	\$763,801	\$58,111	8.2%
Athletics High School Coaching Stipends	\$93,947	\$148,169	\$54,222	57.7%
High School Music Teacher Salaries	\$142,050	\$193,274	\$51,224	36.1%

\* New costs due to new building using gas instead of electricity.

## Proposed Cuts and Adds

Although all three of the original FY2012 budgets provided increases in funding over the FY2011 level, they were significantly different, with the Level Services Budget approximately \$2 million higher than the Available Funds Budget, and the Mission Critical Budget nearly \$3 million higher. In order to accommodate the projected available funds, the School Department reduced services in a number of programs. Among the more significant cuts were the elimination of art and music from the elementary schools, 5<sup>th</sup> and 6<sup>th</sup> grade foreign languages from the middle school, and 4<sup>th</sup> and 5<sup>th</sup> year foreign languages and social studies electives from the high school. In addition, reductions were made in reading specialist support at the elementary and middle schools and in high school science lab experience and instructional time.

With the availability of new revenues and cost savings, the Department has been able to restore a significant portion of these cuts, as well as add additional resources based on current priorities for FY2012. In total, the budget now includes some \$1.506 million in new spending, \$1.162 million of this to restore previously cut line items (out of the

original \$2.017 million in cuts) and \$344,000 to support new spending priorities. The table below details the original available funds cuts and the subsequent restorations and additions contained in the proposed budget.

**Available Funds Budget Cuts and Restorations**

Program / Line Item	Original Budget Cuts		Items Restored or Added		Remaining Cuts	
	FTEs	\$	FTEs	\$	FTEs	\$
<b>Line Items Cut from Level Service Budget</b>						
<b>Foreign Language Programs</b>						
Middle School – Teachers	2.00	\$90,000	1.80	\$81,000	0.20	\$9,000
Middle School – Supplies		\$1,500		\$0		\$1,500
High School – Teachers	3.40	\$153,000	3.00	\$135,000	0.40	\$18,000
High School - Supplies; Textbooks		\$4,000		\$0		\$4,000
<b>Social Studies Program</b>						
Middle School – Teachers	0.75	\$33,750	0.50	\$22,500	0.25	\$11,250
High School – Teachers	3.60	\$162,000	3.00	\$135,000	0.60	\$27,000
<b>Music Programs</b>						
Elementary Schools – Teachers	2.82	\$126,900	2.82	\$126,900	0.00	\$0
Elementary Schools - Equipment; Supplies		\$5,750		\$4,142		\$1,608
Middle School – Teachers	0.40	\$18,000	0.40	\$18,000	0.00	\$0
Middle School - Equipment ; Details		\$7,080		\$5,100		\$1,980
High School - Equip.; Supplies; Travel; Details		\$33,350		\$0		\$33,350
<b>Art Programs</b>						
Elementary Schools – Teachers	2.49	\$112,050	2.49	\$112,050	0.00	\$0
Elementary Schools – Supplies		\$10,450		\$7,527		\$2,923
Middle School – Teachers	0.40	\$18,000	0.40	\$18,000	0.00	\$0
Middle School – Equipment		\$4,680		\$3,371		\$1,309
High School – Equipment		\$2,770		\$0		\$2,770
<b>Reading Program</b>						
Elementary Schools – Teachers	1.00	\$45,000	1.00	\$45,000	0.00	\$0
Middle School – Teachers	1.20	\$54,000	1.20	\$54,000	0.00	\$0
<b>Transportation (Regular Education)</b>						
Regular School Bus Transportation		\$90,000		\$0		\$90,000
<b>Athletics</b>						
High School – Coaching Stipends		\$88,395		\$0		\$88,395
Athletic Director Dues/Conferences		\$1,100		\$0		\$1,100
<b>Physical Education Program</b>						
Elementary Schools – Teachers	1.85	\$83,250	1.85	\$83,250	0.00	\$0
All Schools – Supplies		\$2,550		\$950		\$1,600
<b>Library Services</b>						
High School – Librarian	1.00	\$45,000	1.00	\$45,000		\$0
<b>Theater Arts</b>						
Middle School – Supplies		\$250		\$0		\$250
High School - Equipment Repair		\$6,200		\$0		\$6,200
<b>Science Program</b>						
Middle School – Teachers	0.75	\$33,750	0.50	\$22,500	0.25	\$11,250
High School – Teachers	3.00	\$135,000	2.00	\$90,000	1.00	\$45,000
<b>Guidance</b>						

Elementary Schools – Counselors	1.50	\$67,500	1.50	\$67,500	0.00	\$0
Elementary Schools – Supplies		\$150		\$150		\$0
<b>Kindergarten Program</b>						
Elementary Schools – Teacher	1.00	\$45,000	1.00	\$45,000	0.00	\$0
Elementary Schools - Books; Supplies		\$6,500		\$0		\$6,500
<b>Health Services</b>						
Elementary Schools – Nurses	0.40	\$25,899	0.40	\$18,000	0.00	\$7,899
<b>English Language Learners</b>						
Middle School – Tutor	0.75	\$16,875	0.00	\$0	0.75	\$16,875
<b>Special Education</b>						
All Schools - Teacher Aides	9.00	\$202,500	0.00	\$0	9.00	\$202,500
<b>Fringe Benefits</b>						
Employee Health Insurance		\$162,252		\$0		\$162,252
<b>Utilities</b>						
Elementary School – Electricity Costs		\$69,272		\$0		\$69,272
<b>English Program</b>						
Middle School – Teachers	0.25	\$11,250	0.25	\$11,250	0.00	\$0
Middle School - Textbooks; Supplies		\$5,450		\$0		\$5,450
High School – Textbooks; Supplies		\$2,300		\$0		\$2,300
<b>Building Administration</b>						
Elementary Schools - Lunch Aide	0.33	\$2,808	0.00	\$0	0.33	\$2,808
Elementary Schools - Clerical Support	0.50	\$11,250	0.00	\$0	0.50	\$11,250
<b>Math Program</b>						
Middle School – Teacher	0.25	\$11,250	0.25	\$11,250	0.00	\$0
<b>Elementary School Programs</b>						
Butler Supplies		\$2,475		\$0		\$2,475
Wellington Supplies		\$6,850		\$0		\$6,850
<b>Fine Arts</b>						
Supplies		\$80		\$0		\$80
Fine Arts Dues/Conferences		(\$476)		\$0		(\$476)
Software		\$790		\$0		\$790
<b>Subtotal - Restored Budget Items</b>	<b>38.64</b>	<b>\$2,017,750</b>	<b>25.86</b>	<b>\$1,162,440</b>	<b>12.78</b>	<b>\$855,310</b>
<b>New Line Items Added to Budget</b>						
<b>Elementary Schools</b>						
Classroom Teachers	---	---	2.00	\$90,000	---	---
Reading Teachers	---	---	0.50	\$22,500	---	---
<b>Middle School</b>						
English Teachers	---	---	0.75	\$33,750	---	---
Math Teachers	---	---	1.75	\$78,750	---	---
Reading Teacher	---	---	0.80	\$36,000	---	---
<b>District Wide</b>						
Technology	---	---	---	\$83,058	---	---
<b>Subtotal - Additional Items</b>	<b>---</b>	<b>---</b>	<b>5.30</b>	<b>\$344,058</b>	<b>---</b>	<b>---</b>

These restorations and additions do not include some \$855,000 of the cuts from the original Level Services Budget. In order to restore additional services, this Committee would encourage the School Department to look for further savings in certain line items that were retained in the original Available Funds Budget. The most prominent of these are salary increases. The new budget includes some \$725,000 for step and lane

increases (consistent with the old collective bargaining agreements), as well as \$169,000 in allowances for additional increases that might be negotiated in this year's collective bargaining negotiations or granted as merit raises. In addition, the budget includes \$163,000 in coaching stipends (up from \$94,000 in FY2011) and \$65,000 in professional membership dues and conference attendance fees.

The Warrant Committee recognizes that approximately \$851,000 of the salary increases and allowances are subject to collective bargaining; however wage freezes have been negotiated in other educational institutions, allowing more funds to be devoted to services critical to maintaining classroom instruction.

### **Long Term Issues**

Despite the additional revenues that have become available for FY2012, there remains a significant gap between Belmont's revenue growth, which is now expected to be 3.4% in FY2012, and the 4.7% increase contained in the School Department's proposed budget. This gap continues a trend that has developed during the last several years and is likely to continue to impact education financing in the foreseeable future. Given current revenue forecasts, this rate of budget growth is unlikely to be sustainable in future years without overrides.

There are two principal cost drivers underlying the increases in the School Department's budgets – personnel costs, including both salaries and fringe benefits, and Special Education costs. In addition, an exacerbating factor this year is the loss of some \$525,000 in federal stimulus money (the ARRA IDEA Grant), although this loss will be largely offset by an expected \$400,000 increase in circuit breaker funding from the State.

Personnel Costs - Salaries: Because public education is a labor-intensive undertaking, personnel costs, consisting of salaries, other direct compensation, and fringe benefits, are the largest single budget component. In the FY2011 budget, salary costs alone accounted for 62.8% of the General Fund school budget; in the FY2012 budget approximately 62.0%.

Because they are such a large budgetary component, increases in salary levels have a substantial impact on overall budget growth. This is particularly true of those employees in Bargaining Unit A, who represent approximately 70% of total School Department personnel and include teachers, guidance counselors, and other professional staff. Under existing "step and lane" arrangements, these employees receive annual step increases averaging 4.2% for the first 14 years of their employment and lane increases averaging from 1.7% to 5.6%, for either earning a Masters or Doctorate degree or reaching certain benchmarks for graduate school credit hours. In addition, long-term employees can receive longevity increases upon reaching 15, 20, and 25 years of service. These measures are built into collective bargaining

agreements and result in annual increases which are not always reflective of general economic conditions.

If we adjust for variations in FTE counts, these provisions will produce a 3.3% increase in salary costs for Unit A employees in the FY2012 budget, exclusive of the impact of any lane increases or agreed-upon cost of living increase. (That this increase is less than the average step raise cited above is because 21% of these employees have already attained step 14.) In the last collective bargaining agreement, with a term of 2007-2010, these employees received 3.5% annual cost-of-living adjustments; when added to step rate increases, these adjustments resulted in total annual increases of approximately 7.8%.

The cumulative effect of these salary increases is potential budget growth that will be unsustainable in the long term. Addressing these issues is a difficult task, but one that is critical to correcting the likely imbalance between future costs and revenues.

Special Education Costs: Costs for the Special Education program also constitute a significant percentage of the overall School Department General Fund budget -- 19.8% in the FY2011 budget, and increasing to 20.2% next year. Moreover, costs for this program have been increasing significantly for a number of years; in particular, costs associated with out-of-district placements have been growing at an average rate of 10.9% from FY2004 through FY2011. Overall program growth for next year is estimated at 6.8%.

Interestingly, these long-term cost increases have occurred during a period when student enrollment in the Special Education program has decreased, from 480 in FY2004 to 398 in FY2011 (with a peak of 535 in FY2007). As discussed further below, School Department officials point to increases in the severity of student disabilities and need for services, in State-mandated program requirements, and in the costs for individual service components as the primary program cost drivers.

Three program components account for most of the FY2012 increase in Special Education program costs.

- **Salary Costs:** Employee salaries represented 38% of the FY2011 budget. The dynamics that drive these costs higher each year have already been discussed. Within the Special Education program, these costs are projected to increase in FY2012 by between 3.2% and 3.7%.
- **Out-of-District Tuitions:** The largest component the Special Education program budget are the tuition costs associated with out-of-district placements, accounting for approximately 45% of FY2011 program costs. As noted earlier, this component, together with transportation and contracted services, has been a major driver of

increased program costs since FY2004. It is also experiencing the largest increase in the FY2012 budget, at 9.64%.

As noted earlier, School Department officials have attributed these cost increases not to higher placement numbers, but, at least in part, to increases in the severity of their disabilities and need for services. This statement appears to be supported by the data reported annually to the state Department of Elementary and Secondary Education regarding student educational environments and disability types.

Although this Committee does not have historical placement counts, total students reported to the state as being in those educational environment categories consistent with out-of-district placement (Substantially Separate, Public Day, Private Day, and Private Residential) have decreased by 9, or 8.2% during the past five years. At the same time, the data suggest that disability severity has tended to increase during this period. For example, the numbers of students having specific learning disabilities, which are unlikely to require out-of-district placement, have decreased by 133, or 60%, since FY2007; conversely, students diagnosed with autism have increased during the same period by 20, or 67%.

- **Transportation:** The third significant contributor to the increased Special Education budget is transportation. Closely related to out-of-district placements, this item accounted for approximately 9% of the total program budget in FY2011, and is expected to grow 13.4% next year.

Although transportation costs have been a component of the 10.9% annual increase since 2004, they have exhibited considerable fluctuation in recent years. In FY2010, actual costs totaled \$747,000, which was \$147,000 higher than had been budgeted; however, in the current fiscal year they are expected to decrease to \$700,000. Since the School Department is not predicting increased out-of-district placements in the coming year, the basis for the \$107,000 increase included in the FY2012 budget is unclear.

Maintenance: An additional factor that is likely contributing to higher School Department costs is deferred maintenance. Putting off maintenance to preserve operating programs tends to increase costs and results in additional pressure in subsequent years' budgets. The Capital Budget Committee was recently asked to fund \$133,000 of air duct cleaning, which should be part of a regular maintenance program. Consolidation of building services for the town and schools should help address this issue.

### **Observations and Recommendations**

Cost Growth Rates: Salaries, benefits, and special education represent large parts of the budget, in terms of both absolute amounts and percentages. Continued growth at

current rates for employee salaries (2.5% average for all department employees, without cost-of-living or merit increases) and non-salary Special Education costs (14.3%) could produce 3.5% annual growth in the School Department's future budgets even if all other budget components, including workforce size, fringe benefits, and all other non-personnel costs, were held constant.

Salary Structure Changes: In an earlier section, we urged the Department to try to negotiate a wage freeze to relieve budgetary pressure in FY2012. In order to contain cost increases over the long term, the Committee believes the Department needs to address the underlying employee salary structure, including step and lane increases, that produces these increases even during economic downturns, when the cost of living is relatively stable and the ability of Belmont taxpayers to support the schools is more limited. We support the School Committee's current initiative to revisit the salary structures contained in its collective bargaining agreements.

To illustrate the impact of the current salary schemes, if the number of steps for Unit A employees were seven, rather than the current fourteen, the resulting salary increases due next year would be approximately \$310,000, instead of the current estimate of \$644,000. Reducing the size of individual step increases from the current 4.2% could have a similarly beneficial impact on the budget. We recognize that these are very difficult issues to address in collective bargaining negotiations, but future growth in tax revenues is not likely to support these increases, and the alternatives of frequent lay offs and reduced educational programs are clearly not preferable options.

Staffing Strategies: The new School Department budget calls for total staffing of 408, down from the 417 contained in the Level Services Budget. At the same time, a review of the Department's specific program restorations indicates the addition of five new teaching positions. While this is a relatively small number, the restorations do change the staffing mix to include more Unit A employees, who receive what is currently the most generous compensation package. In strategizing how best to meet the educational needs of Belmont's student, we would encourage the Department to consider alternate service delivery models.

Special Education LABBB Program: Belmont has an established a collaborative program with nearby towns (the LABBB program) in order to provide services more efficiently to students who require out-of-district placements. The theory here is that, because LABBB program components are under the control of the participating School District Superintendents, program costs such as employee salaries can be better controlled.

In practice, it is unclear whether this cost-containment objective is being achieved. A review of per-student out-of-district tuition costs during FY2010, as well as current estimates for FY2011, does not suggest that LABBB costs are lower on any consistent basis. In FY2010, such placements did cost \$33,539 on average, compared to \$35,420

for private tuitions and \$71,110 for MA tuitions. However, during the current year, average LABBB placement costs are projected to be the highest: \$54,189 vs. \$32,611 for private tuitions and \$27,760 for MA tuitions. Based on this admittedly small sample, all three types of tuition costs seem to vary widely from year to year, and the cost-control benefits of LABBB are questionable. The Committee recommends that a more detailed evaluation of the relative costs and the benefits of this program be conducted.

Quarterly Reports: The School Department has not been producing year-to-date reports of actual against projected expenditures at regular intervals during the fiscal year. In order to provide better monitoring of the school budget and avoid surprises later in the fiscal year, the Committee requests that the Department provide quarterly reports of actual versus projected expenditures by line item or other appropriate grouping of items, and that it include revolving account and grant expenditures in these reports.

Revolving Accounts: The Schools are funded in part through revolving accounts where fees, tuitions, gate receipts, and other amounts paid on account of specific programs are placed to be used to fund those programs. The School Department has not historically accounted for the use of these funds over the course of the year but instead has applied the revolving accounts against past expenditures. In order to present a clearer picture of where the School budget stands during the fiscal year, and to show more clearly that the revolving account funds are being spent on the supported programs, the Committee recommends that the School Department account for revolving account outlays as programmatic expenditures over the course of the fiscal year.

Fees: The School Department has recently increased fees to shift costs from the school budget to the students' families. In FY2011, the School Department increased fees for athletics and student activities, among other things. High school sports now require a per student per season fee of \$450 for the first season, \$300 for the second, and \$150 for the third, while middle school basketball charges \$280. There is a middle school activities fee of \$150 and a high school activity fee of \$100. In FY2012, fees will increase for pre-Kindergarten (by 10%) and non-mandated busing (from \$520 to \$575 per student and the removal of a family cap). There is a serious question whether this source of revenue can be pushed further without unduly limiting access to programs.

Special Education: Special Education is now accounted for as one program (Program 22). In order to better track the cost driver items, the Committee recommends that tuitions, transportation and contracted services be treated as a separate program.

Belmont Public Schools  
Fiscal Year 2012 Budget

Town Meeting Member Materials

for Annual Town Meeting, commencing May 9, 2011

To the Citizens of Belmont and Town Meeting Members,

Our community expects the Belmont Public School system to be one of continued excellence, one which continues to be one of the top performing districts in Massachusetts and provides a high level of outcomes for all our students. Our school system is considered to be a prime asset, one which reflects the priorities of our citizens and meets the high expectations we have in ensuring we are preparing our students to gain the 21<sup>st</sup> century skills they need to thrive.

Our citizens also expect our school system to be highly efficient and we continue to operate with per pupil costs below the state average, while maintaining program quality that is well above and emulated by our peer districts. We continue to look for both cost savings and resource efficiencies. We rely on, and are enormously grateful for, support from the Foundation for Belmont Education, PTA and PTO groups, the many other Booster and 'Friends of' organizations as well as countless volunteer hours and wish-list donations to sustain our programs.

Last week the Belmont Public Schools conducted its second Community Dialogue – a way for the community to discuss and articulate priorities and expectations we have for our students. Our first such event, held in October of 2009, was the framework for an 18-month improvement plan crafted by Dr. Entwistle and the Leadership Council which assessed the needs of our students, identified goals to meet these needs and implemented an improvement strategy designed to align our available resources to meet these goals. The results of this second dialogue will inform subsequent improvement plans, identify targets and help guide the building of the FY13 budget.

The FY 12 budget of \$41,575,783 based on current available revenue is one that is credible, is aligned with the needs of the students and supports the programs, systems and structures needed to sustain Belmont Public Schools. While falling short of being able to fully achieve the level services that are currently provided in our schools it does equitably distribute the available resources throughout the system.

We are grateful for the deep commitment to education that our town leaders demonstrate, especially in continued difficult fiscal circumstances. We thank you, the citizens of Belmont, for your continuing support for our schools and our community. We look forward to working with other town bodies to improve the budget process and welcome questions, comments or suggestions.

Laurie Graham, Chair

Belmont School Committee

# BELMONT PUBLIC SCHOOLS



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## FISCAL YEAR 2012 LEADERSHIP COUNCIL'S RECOMMENDED BUDGET JULY 1, 2011 – JUNE 30, 2012

PRESENTED TO BELMONT SCHOOL COMMITTEE ON APRIL 29, 2011 – DRAFT 2

### Table of Contents and Descriptions:

1. FY12 Budget Adjustments (2 pages) – The first page was received at the joint Board of Selectmen and School Committee meeting on April 25, 2011. This page shows expected FY12 additional revenue and costs savings. The second page reformats the data on the first page to identify new revenue for the School Department and costs savings within School Department budget line items; this data is used to arrive at the revised available revenue in this Draft 2 budget of \$41,575,783.
2. Potential Restorations, phases 1-6 – This document was developed by the Leadership Council (which is made up of the School Department Central Office Administrators, building Principals and Curriculum Directors). It delineates what items will now be included in the Draft 2 budget after approximately \$2 Million was targeted for reduction, based on the original FY12 available revenue total of \$40,565,083. Items from phases 1-3 have been included in the Draft 2 budget.
3. Budget Summary by program (2 pages) – This document lists the totals for each program area operated by the School Department. For each program area the full-time equivalency (FTE) and costs in dollars are reported for FY10 Actual expenditures, FY11 Available Funds Budget, FY12 Level Service Budget (defined as the staff and costs necessary to provide this year's services next year), FY12 "Mission-Critical" Budget (which combines the FY12 Level Service Budget and adds items that are essential to the School Department in executing its mission in affecting positive educational outcomes for all students), FY12 Available Funds Budget (totaling \$41,575,783 in Draft 2). This Summary also includes the change from the FY11 Available Funds Budget to the FY12 Available Funds Budget, in terms of FTEs, dollars and percent change in dollars. The Draft 2 Budget Summary includes the restorations made and various other adjustments that have occurred during the budget development process which began in October, 2010.
4. FY12 Enrollment Projection (2 pages) – The actual enrollment based on a count from April 1, 2011 is included. This count is used as the basis for developing a projection for FY12. Grades K-11 in the current year were rolled forward to grades 1-12 for next year. Kindergarten enrollment was projected based on what is known at this time by the elementary Principals. Current enrollment for students participating in LABBB Collaborative programs on-site were rolled forward to FY12.

# Budget adjustments, Dec 2010 - April 2011

## Potential adjustments to available revenue

Revenue side	Dec-10	Apr-11	Change
Overlay Surplus	\$ 350.0	\$ 125.0	\$ (225.0)
State aid	\$ 6,797.0	\$ 7,799.8	\$ 1,002.8
Circuit breaker	\$ 546.8	\$ 946.8	\$ 400.0
<b>Subtotals</b>	<b>\$ 7,693.8</b>	<b>\$ 8,871.6</b>	<b>\$ 1,177.8</b>

## Cost side

Minuteman	\$ 850.0	\$ 888.1	\$ (38.1)
Overlay	\$ 800.0	\$ 800.0	\$ -
State charges	\$ 1,531.0	\$ 1,492.0	\$ 39.0
<b>Subtotals</b>	<b>\$ 3,181.0</b>	<b>\$ 3,180.1</b>	<b>\$ 0.9</b>

Net change in available revenue \$ 1,178.7

## Potential adjustments to line item costs

	Total	School	Town
Health insurance (6% to 5%)	\$ (91.2)	\$ (55.2)	\$ (36.0)
Revised Medicare choice	\$ (180.2)	\$ (87.0)	\$ (93.2)
BLD rates	\$ (122.8)	\$ (40.0)	\$ (82.8)
Reduction in solid waste	\$ (170.0)	NA	\$ (170.0)
<b>Totals</b>	<b>\$ (564.2)</b>	<b>\$ (182.2)</b>	<b>\$ (382.0)</b>

Note: There is also a shift of \$50K for sidewalks from operating budget to capital budget, but this does not increase total town revenue.

Received at BOS meeting 4/25/11

# BELMONT PUBLIC SCHOOLS

# FY12 BUDGET

FY12 BUDGET ADJUSTMENTS DEC, 2010 - APR, 2011

	<b>INCREASE IN REVENUES</b>	
A	OVERLAY SURPLUS	(225,000)
B	STATE AID	1,002,800
C	CIRCUIT BREAKER	400,000
D (A+B+C)	<b>SUBTOTAL NEW REVENUE</b>	<b>1,177,800</b>
E	AMBULANCE REVENUE	150,000
F	STATE CHARGES LESS MINUTE MAN	900
G	TOWN SAVINGS (HI, MEDICARE, BMLD)	382,000
H (D+E+F+G)	<b>TOTAL NEW REVENUE + SAVINGS</b>	<b>1,710,700</b>
I	LESS: REVENUE/SAVINGS AVAIL FOR TOWN	300,000
J (H-I)	<b>SUBTOTAL: NEW REVENUE FOR SCHOOL DEPT.</b>	<b>1,410,700</b>
	<b>COST SAVINGS WITHIN SCHOOL DEPT LINE ITEMS</b>	
K	HEALTH INSURANCE	55,200
L	REVISED MEDICARE CHOICE	87,000
M	BMLD RATE DECREASE	40,000
N (K+L+M)	<b>TOTAL COST SAVINGS TO SCHOOL DEPT</b>	<b>182,200</b>
O (J+N)	<b>TOTAL NEW REVENUE + COST SAVINGS</b>	<b>1,592,900</b>
P	AVAILABLE REVENUE DRAFT 1 2/4/11	40,565,083
Q (=J)	ADD: NEW REVENUE FOR SCHOOL DEPT.	1,410,700
R (=C)	LESS: CIRCUIT BREAKER*	(400,000)
P+Q	<b>AVAILABLE REVENUE DRAFT 2 4/28/11</b>	<b>41,575,783</b>

\*CIRCUIT BREAKER FUNDS ARE NOT GENERAL FUND REVENUE; INSTEAD, SPED OUT OF DISTRICT TUTION COSTS WILL BE REDUCED FROM THE GENERAL FUND AND CHARGED TO CIRCUIT BREAKER FUNDS.



**FY12 BUDGET**

**DRAFT 2**

**4/28/2011**

**SUMMARY BY PROGRAM**

LABELLED AS LEVEL SERVICE IN 1/11/11

	Actual FY10		Avail. Funds FY11	Budget FY10		Actual FY10	Avail. Funds FY11	TRADITIONAL LEVEL SERVICE		FY12 LEVEL SERVICE BUDGET + MISSION-CRITICAL INVESTMENTS		FY12 AVAILABLE FUNDS		CHANGE: FY11 AVAILABLE FUNDS VS FY12 AVAILABLE FUNDS	
	FTE	\$		FTE	\$			FTE	\$	FTE	\$	FTE	\$	FTE	\$
<b>INSTRUCTION</b>															
1 REGULAR INSTRUCTION	22.95	1,318,818	1,541,999	1,472,286	1,318,818	1,318,818	1,541,999	23.65	1,613,509	24.65	1,666,778	24.40	1,640,459	0.65	98,460
2 ENGLISH	8.90	690,784	616,838	687,924	690,784	690,784	616,838	8.90	883,813	9.30	705,121	10.20	741,363	1.70	124,525
3 READING	50.00	3,629,999	4,004,486	3,464,335	3,629,999	3,629,999	4,004,486	64.26	4,387,913	65.26	4,484,182	65.26	4,415,319	9.26	410,823
3A-D ELEMENTARY	1.80	131,062	133,643	131,062	133,643	133,643	133,643	1.30	133,937	1.30	133,937	1.30	133,543	-	13,419
4 FINE ARTS	9.70	675,112	715,875	675,112	696,579	696,579	715,875	9.49	738,332	9.49	738,332	9.49	730,882	(0.61)	15,007
5 ART	8.90	682,402	713,312	682,402	680,817	680,817	713,312	10.00	808,992	10.00	808,992	10.00	772,502	1.10	59,190
6 MUSIC									6,450		6,450				
7 THEATER ARTS															
8 KINDERGARTEN	11.85	741,066	706,087	645,514	741,066	741,066	706,087	10.50	701,590	10.50	701,590	10.50	695,090	-	(11,007)
9 MATH	23.85	1,798,120	1,713,164	1,798,120	1,663,128	1,663,128	1,713,164	23.85	1,710,474	25.65	1,806,358	25.60	1,789,224	1.05	76,060
10 PHYSICAL EDUCATION	7.40	544,622	553,360	544,622	553,360	553,360	553,360	7.55	552,800	7.55	552,800	7.55	551,200	(0.05)	(19,987)
11 SCIENCE	26.05	1,814,533	1,713,709	1,814,533	1,713,709	1,713,709	1,819,065	27.45	1,913,038	28.45	1,997,038	24.20	1,760,788	(2.25)	(58,277)
12 HEALTHED	1.90	95,882	121,676	95,882	121,676	121,676	121,676	2.20	132,424	2.20	132,424	2.20	132,424	0.20	19,796
13 TECH ED	1.85	110,864	112,494	110,864	112,494	112,494	112,494	0.80	64,821	1.80	118,090	0.80	64,821	(0.05)	10,454
14 SOCIAL STUDIES	21.75	1,496,099	1,494,075	1,496,099	1,494,075	1,494,075	1,670,168	24.85	1,754,573	25.85	1,838,573	25.60	1,758,631	1.25	88,463
15 FOREIGN LANGUAGE	16.40	1,171,131	1,193,537	1,171,131	1,193,537	1,193,537	1,193,537	16.65	1,178,371	18.05	1,293,679	17.45	1,211,141	0.65	17,604
<b>SUBTOTAL</b>	<b>213.30</b>	<b>14,789,886</b>	<b>15,552,857</b>	<b>14,789,886</b>	<b>14,738,543</b>	<b>14,738,543</b>	<b>15,552,857</b>	<b>231.45</b>	<b>16,381,035</b>	<b>240.05</b>	<b>16,984,342</b>	<b>234.55</b>	<b>16,397,384</b>	<b>12.90</b>	<b>844,527</b>
<b>SPECIAL INSTRUCTION</b>															
20 ENGLISH LANG. LEARNERS	3.55	80,158	222,363	135,612	80,158	80,158	222,363	4.70	201,316	4.70	201,316	3.95	184,441	(1.66)	(37,922)
21 PRE-KINDERGARTEN	13.04	550,064	566,539	560,780	550,064	550,064	566,539	14.26	633,397	14.26	633,397	14.26	633,397	1.17	66,858
22 SPECIAL EDUCATION	74.36	7,300,536	7,871,508	7,124,563	7,300,536	7,300,536	7,871,508	72.52	9,067,085	72.52	9,067,086	63.82	8,408,462	(9.75)	536,954
<b>SUBTOTAL</b>	<b>90.95</b>	<b>7,820,955</b>	<b>8,660,410</b>	<b>7,820,955</b>	<b>7,930,758</b>	<b>7,930,758</b>	<b>8,660,410</b>	<b>91.48</b>	<b>9,901,798</b>	<b>91.48</b>	<b>9,901,796</b>	<b>82.03</b>	<b>8,226,299</b>	<b>(10.24)</b>	<b>565,889</b>
<b>STUDENT &amp; INSTRUCTIONAL SERVICES</b>															
30 ATHLETICS	1.30	261,767	230,775	298,987	261,767	261,767	230,775	1.00	339,296	1.00	339,296	1.00	249,801	0.10	19,026
31 STUDENT ACTIVITIES	0.25	46,670	24,193	20,297	46,670	46,670	24,193	0.25	38,128	0.25	38,128	0.25	38,128	0.05	13,935
33 GUIDANCE	11.40	770,368	801,089	770,368	748,459	748,459	801,089	10.60	756,047	11.60	809,316	10.60	756,047	(1.00)	(45,042)
34 PSYCHOLOGICAL SERVICES	2.73	215,182	218,891	215,182	218,246	218,246	218,891	2.73	223,453	2.73	223,453	3.73	276,722	1.00	57,831
35 HEALTH SERVICES	6.70	431,236	473,692	431,236	434,111	434,111	473,692	7.50	506,058	7.50	506,058	7.50	506,058	0.30	32,366
36 LIBRARY	6.92	313,911	189,022	313,911	323,617	323,617	189,022	3.03	199,977	3.03	199,977	3.03	199,977	0.11	10,955
37 TECHNOLOGY & AV	9.28	875,802	873,379	875,802	818,538	818,538	873,379	9.50	934,073	9.50	1,009,073	9.50	1,017,131	0.22	143,752
38 CURRICULUM DEVELOPMENT	1.00	108,472	96,047	108,472	96,047	96,047	103,172	1.00	102,166	1.00	112,266	0.80	89,550	(0.20)	(13,623)
39 STAFF DEVELOPMENT	1.00	230,821	225,618	230,821	225,618	225,618	217,034	1.00	214,528	1.00	223,766	0.80	201,912	(0.20)	(15,123)
40 SUBSTITUTES	-	260,000	322,658	260,000	322,658	322,658	320,000	-	370,000	-	370,000	-	370,000	-	50,000
52 TRANSPORTATION (REG ED)	-	65,310	117,754	65,310	117,754	117,754	148,650	-	161,610	-	161,610	-	71,610	-	(77,020)
<b>SUBTOTAL</b>	<b>40.58</b>	<b>3,590,386</b>	<b>3,614,778</b>	<b>3,590,386</b>	<b>3,614,778</b>	<b>3,614,778</b>	<b>3,599,877</b>	<b>36.61</b>	<b>3,845,335</b>	<b>37.61</b>	<b>3,992,942</b>	<b>37.21</b>	<b>3,776,935</b>	<b>0.38</b>	<b>177,058</b>



BELMONT PUBLIC SCHOOLS  
ACTUAL ENROLLMENT 4/1/2011

	Pre	K	1	2	3	4	TOTALS: 4/1/2011
BURBANK		19	20	23	24	23	
		20	21	22	24	22	
		19	21	21	23	22	
		58	62	66	71	67	324
BUTLER		17	23	22	23	25	
		18	22	22	22	22	
		19	22	22	23	24	
		16	17				
		70	84	66	68	71	359
LABBB	15						15
WELLINGTON		22	23	23	21	25	
		21	22	24	20	26	
		22	22	24	22	25	
		21	22	24	21		
		86	89	95	84	76	430
LABBB	9						9
WINN BROOK	14	21	22	22	25	22	
	13	20	22	20	25	23	
	14	21	22	20	24	22	
	14	22	22	23	25	22	
	12						
		84	88	85	99	89	445
	67						67
							512
	<u>Pre</u>	<u>K</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	
	67	298	323	312	322	303	1625
LABBB	24						24
							1649
<u>CHENERY MIDDLE</u>							
	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>			
	318	301	302	282			1203
LABBB	25						25
							1228
<u>HIGH SCHOOL</u>							
	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>			
	282	255	277	283			1097
LABBB	32						32
							1129

TOTAL ELEMENTARY	1649
TOTAL SECONDARY	2357
TOTAL ENROLLMENT	4006

TOTALS: LABBB	OOD*	PRE	ELEM	CMS	BHS
81	17	67	1649	1228	1129

OOD\* - OUT OF DISTRICT - ON SITE BELMONT STUDENTS:

Elem.	LABBB	7	CMS	LABBB	5	HS	LABBB:	5
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BELMONT PUBLIC SCHOOLS  
FY12 PROJECTED ENROLLMENT

FY12 BUDGET  
DRAFT 2

4/29/2011

	Pre	K	1	2	3	4	FY12 PROJECTED	TOTALS: 4/1/2011	CHANGE																														
BURBANK		17	19	20	23	24																																	
		17	20	21	22	24																																	
		18	19	21	21	23																																	
		52	58	62	66	71	309	324	-15																														
AVE	17.3	19.3	20.7	22.0	23.7																																		
BUTLER		20	17	23	22	23																																	
		20	18	22	22	22																																	
		20	19	22	22	23																																	
		60	70	84	66	68	348	359	-11																														
LABBB 15							15	15	0																														
AVE	20.0	17.5	21.0	22.0	22.7																																		
WELLINGTON		23	22	23	23	21																																	
		23	21	22	24	20																																	
		22	22	22	24	22																																	
		22	21	22	24	21																																	
		112	86	89	95	84	466	430	36																														
LABBB 9							9	9	0																														
AVE	22.4	21.5	22.3	23.8	21.0																																		
WINN BROOK	14	14	21	22	22	25																																	
	13	21	20	22	20	25																																	
	14	22	21	22	20	24																																	
	14	21	22	22	23	25																																	
	12																																						
	67	78	84	88	85	99	434	445	-11																														
							67	67	0																														
							501	512	-11																														
AVE	13.4	19.5	21.0	22.0	21.3	24.8																																	
	<u>Pre</u>	<u>K</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>																																	
LABBB 24	67	302	298	323	312	322	1624	1625	-1																														
							24	24	0																														
							1648	1649	-1																														
<u>CHENERY MIDDLE</u>																																							
	<u>5</u>	<u>6</u>	<u>7</u>	<u>8</u>																																			
LABBB 25	303	318	301	302			1224	1203	21																														
							25	25	0																														
							1249	1228	21																														
<u>HIGH SCHOOL</u>																																							
	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>																																			
LABBB 30	282	282	255	277			1096	1097	-1																														
							30	32	-2																														
							1126	1129	-3																														
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">TOTAL ELEMENTARY</td> <td style="width: 10%;">1648</td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;"></td> <td style="width: 10%;">ELEM</td> <td style="width: 10%;">1648</td> <td style="width: 10%;">1649</td> <td style="width: 10%;">-1</td> </tr> <tr> <td>TOTAL SECONDARY</td> <td>2375</td> <td></td> <td></td> <td></td> <td></td> <td>CMS</td> <td>1249</td> <td>1228</td> <td>21</td> </tr> <tr> <td>TOTAL ENROLLMENT</td> <td>4023</td> <td></td> <td></td> <td></td> <td></td> <td>BHS</td> <td>1126</td> <td>1129</td> <td>-3</td> </tr> </table>										TOTAL ELEMENTARY	1648					ELEM	1648	1649	-1	TOTAL SECONDARY	2375					CMS	1249	1228	21	TOTAL ENROLLMENT	4023					BHS	1126	1129	-3
TOTAL ELEMENTARY	1648					ELEM	1648	1649	-1																														
TOTAL SECONDARY	2375					CMS	1249	1228	21																														
TOTAL ENROLLMENT	4023					BHS	1126	1129	-3																														
TOTALS: LABBB	79	OOD*	18	PRE	67		4023	4006	17																														
OOD* - OUT OF DISTRICT - ON SITE BELMONT STUDENTS:																																							
Elem.	LABBB	7	CMS	LABBB	5	HS	LABBB:	5																															

ADVANCED ALL COUNTS ONE GRADE, USED K ENROLLMENT, AS KNOWN BY ELEMENTARY PRINCIPALS AS OF 4/26/11.  
ASSUMES NO CHANGE FOR LABBB, PK, OR OOD

**ARTICLE 11: Authorization of Expenditure from Revolving Funds**

MOVED: That the Town reauthorize and establish the following revolving accounts for certain town departments pursuant to Massachusetts General Laws chapter 44, section 53E½ for the fiscal year beginning July 1, 2011, as follows:

Revolving Account	Spending Authority	Revenue Source	Allowed Expenses	Expenditure Limits
Teen/Youth Events	Recreation Commission	Event fees	Teen/youth center events	\$5,000
Senior Programs	Council on Aging	Course and program fees	Program costs, including trip expenses	\$50,000
Art Gallery	Belmont Cultural Council	Proceeds from art sales	Gallery exhibit and event expenses	\$15,000
Rock Meadow Maintenance	Conservation Commission	Rental fees from garden plots	Restoration and maintenance of Rock Meadow Conservation Area	\$10,000
Copying/Lost Books	Board of Library Trustees	Lost book fees; printing and copying fees	Replacement of lost books; paper, ink, printer/copier maintenance and replacement	\$10,000
Ambulance	Fire Chief	Ambulance fees and revenue	Expenses related to the ambulance service	\$300,000 effective March 1, 2012

**Article 11 – Amendment by Board of Library Trustees**

Moved: To amend the expenditure limits for the Copying/Lost Books revolving account under the Spending Authority of the Board of Library Trustees by changing the Expenditure Limit to \$15,000 from \$10,000.

**ARTICLE 13: Butler School Boiler Replacement**

MOVED: That that this article be dismissed.

**ARTICLE 14: Pipeline Assistance Loan Program**

MOVED: That there be, and hereby is, appropriated the sum of \$3,477,000 for the purpose of performing water main rehabilitation, including, without limitation, replacement or sliplining of unlined water mains, water main cleaning and lining, identification and replacement of water service connections constructed of lead or other services in poor condition, looping of dead-end water mains, water valve and hydrant installation or replacement, water storage tank rehabilitation, and engineering, planning, design and construction services associated with any of the foregoing ("the project"); that to meet this appropriation the Treasurer, with the approval of the Board of Selectmen, is authorized to borrow up to \$3,477,000 and issue bonds or notes therefor under Chapter 44 of the General Laws or any other enabling authority; that the Treasurer, with the approval of the Board of Selectmen, is authorized to borrow all or a portion of said amount from the Massachusetts Water Resources Authority ("MWRA") pursuant to its Local Water System Assistance Program, and in connection therewith to enter into a loan agreement and/or financial assistance agreement with the MWRA and otherwise to contract with the MWRA with respect to such loan and for any federal or state aid available for the project or for the financing thereof; and that the Board of Selectmen is authorized to expend all funds for the project and to take any other action necessary to carry out the project.

## MWRA I/I Local Financial Assistance Program

### Article 15

#### **Article: Authorization to Participate in the MWRA I/I Local Financial Assistance Program**

To see if the Town will vote to appropriate a sum of money to allow the Office of Community Development to participate in the Massachusetts Water Resources Authority's Infiltration/Inflow Local Financial Assistance Program for the purpose of designing and constructing improvements to the sanitary sewer and storm drain system to mitigate the impacts of infiltration/inflow in the sanitary sewer system; said sum to be raised by borrowing under the program, or in any way act thereon.

This article is proposed by the Office of Community Development and seeks Town Meeting authorization to borrow funds at a 0% rate of interest from the Massachusetts Water Resources Authority in connection with their Infiltration/Inflow Local Financial Assistance Program. Funds for repayment of the loan would be raised through sewer user fees.

The Warrant Committee and the Capital Budget Committee will report orally on this Article.

#### **Proposed Motion Under Article 15**

*MOVED:* That there be, and hereby is, appropriated the sum of \$559,405.55 for the design and construction of improvements to the sanitary sewer and storm drain system to mitigate the impacts of infiltration/inflow in the sanitary sewer system (the "project") related to the Massachusetts Water Resources Authority Infiltration/Inflow Local Financial Assistance Program; that to meet this appropriation the Treasurer, with the approval of the Board of Selectmen, is authorized to borrow up to \$559,405.55 and issue bonds or notes therefor under Chapter 44 of the General Laws or any other enabling authority; that the Treasurer, with the approval of the Board of Selectmen, is authorized to borrow all or a portion of said amount from the Massachusetts Water Resources Authority ("MWRA"), and in connection therewith to enter into a loan agreement and/or financial assistance agreement with the MWRA and otherwise to contract with the MWRA with respect to such loan and for any federal or state aid available for the project or for the financing thereof; and that the Board of Selectmen is authorized to expend all funds for the project and to take any other action necessary to carry out the project.

**TOWN OF BELMONT  
SPECIAL TOWN MEETING  
May 9, 2011**

**Motions Under the Warrant Articles**

**ARTICLE 1**

MOVED: That Article 1 be laid on the table.

*This motion requires a two-thirds vote.*

**ARTICLE 2**

MOVED: That there be, and hereby is, appropriated the sum of \$361,945 to Department 4230, Snow Removal, the same to be raised by transfer from Unreserved Fund Balance known as "Free Cash".

**ARTICLE 3**

MOVED: That the sum of \$167,464.45 be transferred from the following leftover capital expenditures as voted under Article 2 of the November 17, 2003 Special Town Meeting:

2004 Design High School \$2,403.07;

under Article 10 of the June 18, 2007 Annual Town Meeting:

2008 Highway Yard Building Ventilation \$7,906.57  
2008 Data Integration \$2,966.48;

under Article 10 of the April 28, 2008 Annual Town Meeting:

2009 Generator-Homer Electrical Back up \$11,420.50  
2009 Fire Radio Station Phase 2 \$929.72;

under Article 9 of the June 1, 2009 Annual Town Meeting:

2010 Library Walkways and Sidewalks \$1,967.00  
2010 Highway Dump Truck 37K GVW \$9.49  
2010 Elementary School Security System \$84,586.93  
2010 High School Driveway Repaving \$26,132.49;

and under Article 9 of the May 25, 2010 Annual Town Meeting:

2011 Feasibility Study for High School Science Labs	\$20,000.00
2011 High School Translucent Panels	\$8,787.24
2011 Network Switching Equipment	\$353.80
2011 Replace Riding Lawnmower	\$1.16;

Said sum to be transferred for the purpose of meeting the capital expenses for the Town of Belmont for the fiscal year 2012 which are appropriated under Article 9 of the April 25, 2011 Annual Town Meeting; and that the Town Accountant is hereby authorized to make such transfers on the books of the Town.

**MOTION TO DISSOLVE**

MOVED:

That this Special Town Meeting be dissolved.