BELMONT MASSACHUSETTS 02478

19 MOORE STREET

DEPARTMENT OF PUBLIC WORKS

REQUEST FOR PROPOSAL

CONSULTING SERVICES
RECREATION STRATEGIC PLAN

The Town of Belmont Department of Public Works, Recreation Division, acting through its Town Administrator, is seeking proposals from qualified consultants for "Consulting Services for Recreation Strategic Plan" Request for Proposal (RFP) as outlined in these specifications.

Separately sealed Price and Non-Price Proposals, in accordance with Massachusetts General Law c. 30B s. 6 will be required and must be delivered to the Department of Public Works Administration Office, Homer Building 1st Floor, 19 Moore Street, Belmont, MA 02478 on Friday September 18, 2015 by 2:00 p.m. Separately sealed Price and Non-Price Proposals must be plainly marked on the outside **"Proposal for RFP #13-21Consulting Services Recreation Strategic Plan (Price Proposal)"**, and **"Proposal for RFP #13-21, Consulting Services Recreation Strategic Plan" (Non-Price Proposal)"** with the name and address of the Proposer. One (1) original and five (5) copies of the Non-Price Proposal will be required. Only one (1) copy of the Price Proposal is required. The Proposer agrees that its proposal shall remain firm and may not be withdrawn for forty-five (45) days after the opening of the proposals on Monday November 2, 2015 by 2:00 p.m.

The Contract will be awarded to a responsive and responsible proposer capable of performing the services contemplated and meets the minimum criteria as set forth in the specifications in accordance with Massachusetts General Law c. 30B s.6.

The Town of Belmont reserves the right to waive any minor informality and to accept or reject, in part or in whole, any and all proposals or to take whatever action may be deemed to be in the best interest of the Town of Belmont.

For information and specifications pertaining to this Request For Proposal, please contact Jay Marcotte, MPA, Director of Public Works. Belmont is an equal opportunity employer and supports Women and Minority owned Business Enterprises.

Jay Marcotte, MPA
19 Moore Street
Belmont, MA 02478
jmarcotte@belmont-ma.gov

BELMONT MASSACHUSETTS 02478

19 MOORE STREET
DEPARTMENT OF PUBLIC WORKS

REQUEST FOR PROPOSAL

CONSULTING SERVICES
RECREATION STRATEGIC PLAN
GENERAL INSTRUCTIONS TO BIDDERS

A. Invitation to Submit Proposal

Bidders may obtain a copy of the proposal forms, specifications, and other contract documents at the Department of Public Works Administration Office, Homer Building 1st Floor 19 Moore Street, Belmont, MA 02478. The term "bidder" herein shall refer to each entity submitting proposal forms in accordance with the Contract Documents.

Sealed proposals for RFP #13-21, Consulting Services Recreation Strategic Plan will be received by the Town of Belmont, Department of Public Works, Administration Office, Homer Building 1st Floor, by Friday September 18, 2015 no later than 2:00 P.M. Each bidder must submit separate price and non-price proposals.

The proposals shall be in sealed envelopes bearing on the outside the name and address of the bidder, and the inscription **"Proposal for Consulting Services Recreation Strategic Plan (Price Proposal)**, and **"Proposal for Consulting Services Recreation Strategic Plan" (Non-Price Proposal)**, respectively. Bidders are required to make their proposals on the Proposal Forms that are part of these documents and each said Proposal Form shall carry the signature of the bidder. Bidders are required to submit one (1) original and five (5) copies of their Non-Price Proposal. Only one (1) copy of the Price Proposal is required in a separate sealed envelope. The Town of Belmont is anticipating that the total cost of this proposal will be between $30,000 - $40,000 based upon comparable reports recently completed in similar communities.

B. Bidders Examination of Documents

Each bidder shall satisfy him/herself, by personal examination of the location of the contemplated services, and by any other preferred means, as to the requirements of the contemplated services to enable him/her to prepare the proposal intelligently. The bidder shall be familiar with all the Contract Documents before submitting the proposal, in order that no misunderstanding shall exist in regard to the nature and character of the contemplated services to be performed. No allowance will be made for any claim that the proposal is based upon incomplete information as to the nature and character of the area or the contemplated se

C. Submission of Proposal

Each bidder shall submit the proposal upon the blank forms provided by the Town. The bidders shall specify prices in both words and figures and shall also fully describe the service being proposed. All words and figures shall be written in ink. In case of a discrepancy between the words and the figures, the written words shall govern.

All proposals shall be signed correctly, in ink, in the following manner:

- If the proposal is made by an individual, that individual's signature, name, and address shall be given.

- If the proposal is made by a partnership or corporation, it shall be signed by a duly authorized person, who shall give his/her name and title as well as the name and address of the partnership or corporation.

- If the proposal is made by a partnership, the signatures, names, and addresses of the individual members shall be given.

- If the proposal is made by a corporation, the name and the State under the laws of which said corporation is chartered and the signatures, names, titles, and business addresses of President, Treasurer, and Managers shall be given.

D. Review of Bidders and Contract Execution

Proposals that are incomplete or obscure may be rejected, and proposals that contain erasures, alterations, or other irregularities of any kind, or in which errors occur, may be rejected as informal or improper, all as provided for pursuant to M.G.L. c. 30B s. 6

Any or all proposals will be rejected if there is a reason for the Town to believe that there is collusion among the bidders. Any proposal so rejected will disqualify those bidders from consideration in future proposals for the same work and those bidders may be disqualified from bidding on future work.

All proposals will be reviewed in accordance with M.G.L. c. 30B s. 6 by the Chief Procurement Officer and final selection will be based on an evaluation and analysis, by the RFP evaluation committee, of the information and materials required under this RFP. The contract will be awarded to a proposer who meets the minimum evaluation criteria, submits the required documents, has the demonstrated experience and resources to fulfill the contract and best meets the comparative evaluation criteria. The price proposal will be considered as part of the overall evaluation of the proposers.

A bidder may withdraw his/her proposal provided the request is in writing and in the hands of the Department of Public Works **before the deadline by which proposals must be submitted.** Such proposals will be returned unread. The Town of Belmont is an Opportunity Employer and supports Women and Minority Owned Business Enterprises.
The Town of Belmont reserves the right to accept or reject any or all proposals if it is deemed to be in its best interest.

Any questions regarding these specifications or this bid document in general shall be directed in writing **no later than the close of business on Thursday, September 10, 2015 at 2:00 p.m.** to Jay Marcotte, MPA. 19 Moore Street, Homer Building 1st Floor, Department of Public Works Administration FAX 617-993-2681 email: jmarcotte@belmont-ma.gov

The following data will be considered minimum and failure to submit said data will be cause for rejection:

1. Signed "Certificate of Non-Collusion" as a statement that the bid was developed and submitted in good faith without collusion or fraud, in accordance with Massachusetts General Law c.30B, s.10.
2. Signed "Statement of Tax Compliance" in accordance with Massachusetts General Law c.62, s.49A(b).
3. One original and five copies of the Non-Price Proposal, in accordance with these specifications, in a sealed package.
4. One copy of the Price Proposal in a sealed envelope.

Non Price Proposal: You must submit, in a sealed envelope, appropriately marked, your response to all of these specifications. References from any other municipality you have serviced in a similar capacity. Qualifications of the person/persons that will be responsible for fulfilling these duties.

Price Proposal: You must submit, in a sealed envelope, appropriately marked, your cost, plus expenses, for the services outlined in these specifications.

REQUEST FOR PROPOSALS
CONSULTING SERVICES – RECREATION STRATEGIC PLAN

I. Introduction:

The Town of Belmont seeks the services of a consultant to assist it in developing a 5 year recreation strategic plan including the components of programming, utilization and management of recreation assets. This is the first strategic plan that Belmont Recreation has undertaken. Over the years, there have been numerous changes in the way municipal recreation departments operate. Belmont has also experienced demographic changes in the community.

The strategic plan will assist the Town, School and Recreation Department (a division of the Department of Public Works) as they navigate these and other changes. It will honor the traditional services that have made the Recreation Department successful and create the framework for an agile, responsive, creative organization that continues to meet community expectations as they evolve.

II. Background:

The Belmont Recreation Department is a division within the Department of Public Works. The Department is funded through the Town of Belmont's general fund and historically has used revenue (fees) to help off-set costs. The Recreation Department works with the Belmont Public Schools on the use of their athletic facilities, playing fields, an indoor pool, an ice rink and the High School Field House throughout the year. In addition the Recreation Department also utilizes several Town-owned playgrounds and a seasonal outdoor pool for programming. The Recreation Department offers a wide variety of programs and activities.

- There are two (2) pools. One (1) indoor and one (1) outdoor pool, with a variety of aquatic activities throughout the year.
- High School Field House is used for a variety of indoor winter (basketball, volleyball, etc.) and other seasonal activities (camps, after school, etc.)
- Ice Rink is used from October to the end of March. Skating lessons are offered for all ages, skate rentals, youth hockey and High School Hockey games and practices take place at the rink.
- Beech Street Center is the Town's Senior and Adult center offering a variety of senior and adults programs and classes; this facility is used for some Recreation Programs.
- Special needs program, aka S.P.O.R.T. (Special Programs for Organized Recreation Time) is a year round program that provides activities for individuals with special needs. Participants of all ages and levels are welcome to enroll. Funding for this program is provided by the Towns of Belmont and Watertown, as well as user fees and private donations. Dedicated volunteers enable the S.P.O.R.T. program to offer many outstanding programs at nominal fees
- The Town has 6 parks, 5 with baseball and soccer fields (including one turf field) and 24 tennis courts (22 in usable condition)
- The Recreation Department historically has offered around 70 programs throughout the year and relies on use of school facilities for most of its indoor programming.
- Due to limited funding for most of the recreational parks and fields, the town has several relationships with youth organizations that make donations of maintenance, upkeep and upgrades of some of the fields (Youth soccer, Youth Baseball, etc.)

The Board of Selectmen, the Town Administrator and the Director of Public Works have agreed that the Recreation Department is an area of development opportunity for the Town and support the strategic plan.

Below are a link to the Town of Belmont Recreation Department and a link to the FY16 approved budget

www.belmont-ma.gov/recreation
www.belmont-ma.gov/town-administration/files/fy16-section-iii-public-services

In a recent Financial Task Force plan, a report was created identifying revenue opportunities that can be captured within the Recreation Department. This report can be found at www.belmont-ma.gov/financial-task-force. An executive summary and the recreation revenue opportunities report are attached.

III. Project Scope:

The Town of Belmont is seeking an experienced, professional consultant and facilitator to engage stakeholders, collect, organize and analyze data, and make recommendations as part of a 5 year recreation strategic plan:

- Process Timelines
    - Development of a strategic planning process timeline and milestones in collaboration with a steering committee composed of Town and School Administration along with members of the Recreation Commission.
    - Facilitate staff participation in the process.
    - Assist in identification of appropriate stakeholder groups and recommend methods for engaging those groups.
    - Facilitate public meetings and/or focus groups to gather data from Recreation users and non-users.

- Develop 5 year strategic plan. Listed below are tasks which should be addressed in the recreation strategic plan:

1. Review, analyze, respond and make recommendations regarding all of the issues and recommendations in the "Recreation Revenue Opportunities Subcommittee Report dated May 20, 2015" (see link above).

2. Review and re-define the Department's Mission, Vision and basic service delivery philosophies based on the information and analysis compiled.
3. Identify best practices for recreation management, utilization and delivery of programming. Develop a set of guiding principles around which goals and work plans can be developed.

4. Assist in the evaluation of costs (operating, maintenance, debt service, etc.) of each recreation facility and match revenue sources to facilities. Compile all appropriate data for the analysis, such as recreation program utilization information, and survey

stakeholders on customer satisfaction of programs currently offered and desired services not currently offered.

5. Identify the strengths and potential areas of improvement of the Department and programs currently offered. Develop recommendations to address areas of improvement and identify if the solutions are within or beyond the Recreation Department's direct control.

6. Provide recommendations on best management practices in coordinating, managing and funding capital improvements to recreational assets which receive significant financial support from private interests groups that use Town recreational facilities.

7. Inventory current utilization of town and school recreation assets and identify opportunities for additional usage; inventory total usage of private facilities used for recreation programing by the Town of Belmont and vice versa for the public facilities used for programming by private groups. Make recommendations for improving these collaborations as well as to identify opportunities for additional usages.

8. In addition to addressing all of the issues and recommendations in the "Recreation Revenue Opportunities Subcommittee Report dated May 20, 2015", at a minimum develop strategic goals, objectives and recommendations for the coming 5 years that include the above items and the following:
    - Improvements to services, programming, partnerships, and facilities, including an analysis of expenditures and revenues.
    - Identify opportunities for programs and services currently not provided, including estimated expenditures and revenue opportunities.
    - Identify efficiencies that can be realized in the development and delivery of recreation programming.
    - Validate that recreation programs costs are fully supported by program fees.
    - Identify Town and School recreation facilities, audit usage and users and identify availability for possible rentals to outside users to ensure that Town and School recreation facilities are maximizing revenue potential based on the marketplace. Identify other opportunities not currently utilized.
    - Analyze the opportunities and implementation challenges of creating a combined facility and field management function for Town and School recreation facilities. This includes a detailed management, financial, staffing, monitoring and implementation analysis, including an analysis of the advantages and disadvantages of a combined model and revenue opportunities.
    - Recommend whether the Recreation Department expenditures and revenue activity should be contained within the Town's general fund budget or contained in another fund, such as an Enterprise or Revolving Fund. The same analysis should be used to make recommendations for facilities rentals.

- After review of the current staffing, make recommendations for staffing and organizational, leadership and management changes to support the strategic plan.
- Continuing education opportunities for staff or groups of staff based on the planning process.
- Any other recommendations that support the goal of the analysis.

- Present Draft Strategic Plan
  - Attend meetings to present the draft report to the Board of Selectmen, the School Committee and the Recreation Commission by February 2016. Revise plan based on comments.
  - Present final Strategic Plan.
  - Submit the final copy of the Strategic plan in an electronic editable Microsoft Office Word format and provide 15 bound copies of the final report.

III. Requirements:

Expressions of interest from qualified firms and individuals are welcomed and must include the following:

- A cover letter describing the consultant's qualifications and past experience. If a firm, please include the name and a bio of the person(s) who will be doing the work and the management structure of your organization that will support the work to provide this Strategic Plan.
- A work plan that contains methodology, timeline, and deliverables for the project as described in Project Scope Section.
- References including contact information for at least five municipal recreation departments for which the consultant has provided similar strategic planning services within the past 7-10 years.
- Provide at least one (1) completed report that closely addresses the Scope of Services requested by the Town of Belmont.

IV. Selection Criteria:

Proposals will be reviewed and evaluated by the Town Administrator (or assigned designee), the Director of Public Works, staff members of the Recreation Department and others. Criteria for evaluation are shown on pages 9-11:

The Evaluation Team may request one or more consultants to attend a meeting, make a brief presentation, and answer questions regarding their proposals. The Town of Belmont reserves the right to reject any and all proposals. The Town of Belmont reserves the right to cancel the award of the contract at any time prior to the execution of the contract by both parties.

For information and questions pertaining to this project, please contact Jay Marcotte, MPA, Director of Public Works, 617-993-2680 or at jmarcotte@belmont-ma.gov

BELMONT MASSACHUSETTS 02478

REQUEST FOR PROPOSALS
CONSULTING SERVICES – RECREATION STRATEGIC PLAN
EVALUATIVE CRITERIA

The following evaluative criteria will apply to this Request for Proposals:

Unacceptable: A proposal will be considered unacceptable if this ENTIRE document, with all of the attached forms completed and properly signed, is not submitted in accordance with the General Instructions To Bidders, and MGL c.30B.

Criteria #1, Relevant Experience:

Highly Advantageous: A proposal will be considered highly advantageous if you can show proof that the firm and key person for this project has at least seven (7) years of experience with a project similar in scope to these specifications.

Advantageous: A proposal will be considered advantageous if you can show proof that the firm and key person for this project has at least four (4) years of experience with a project similar in scope to these specifications.

Not Advantageous: A proposal will be considered not advantageous if you can only show proof that the firm and key person for this project has fewer than four (4) years of experience with a project similar in scope to these specifications.

Criteria #2, Professional Qualifications:

Highly Advantageous: A proposal will be considered highly advantageous if you can show proof that the firm and key person for this project has a demonstrated record of achievement in the areas of comprehensive strategic planning in local government or related organizations. Demonstrates detailed knowledge, skills, and experience in conducting strategic planning for municipal recreation departments. Has completed a five (5) or more strategic plans for local government or related organization.

Advantageous: A proposal will be considered advantageous if you can show proof that the firm and key person for this project has some record of achievement in the areas of comprehensive strategic planning for local government or related organizations. Demonstrates some knowledge, skills, and experience in conducting strategic planning for municipal recreation departments. Has completed three to four (3-4) strategic plans for a local government or related organization.

Not Advantageous: A proposal will be considered not advantageous if the firm and key person for this project can only show proof that he/she has little record of achievement in the areas of

comprehensive strategic planning in municipal recreation departments and has little knowledge, skills, and experience in conducting strategic planning for municipal recreation departments. Has completed fewer than three (3) strategic plans for a local government or related organization.

.

Criteria #3, Familiarity of current Municipal Recreation Conditions:

Highly Advantageous: A proposal will be considered highly advantageous if the firm and key person for this project can demonstrate a strong knowledge base of the current municipal recreation conditions in the region that is clearly defined and demonstrated in the proposal.

Advantageous: A proposal will be considered advantageous if the firm and key person for this project can demonstrate some knowledge of the current municipal recreation conditions in the region that is demonstrated in the proposal.

Not Advantageous: A proposal will be considered not advantageous if the firm and key person for this project is unable to demonstrate knowledge of the current municipal recreation conditions as demonstrated in the proposal.

Criteria #4, Proposal Presentation

Highly Advantageous: If the firm as a result of their interview, proposal presentation to the selection committee, demonstrates a strong understanding of all the items contained in Section III, Scope of Service, and has a holistic approach to achieving the goals required within the strategic plan.

Advantageous: If the firm as a result of their interview and proposal presentation to the selection committee, demonstrates some understanding of most of the items contained in Section III, Scope of Service, and has a planned approach in achieving some of the goals required within the strategic plan.

Not Advantageous: If the firm as a result of their interview and proposal presentation to the selection committee, cannot demonstrate an understanding of the items contained in Section III, Scope of Service, and does not have a planned approach in achieving the goals that are required within the strategic plan.

A bidder may withdraw a proposal provided the request is in writing and in the hands of the Department of Public Works Office or the persons specified below before the time of opening bids. Such proposal will be returned unread.

The Town of Belmont reserves the right to reject any or all proposals, in part or in whole, if it is deemed to be in the best interest of the Town of Belmont.

Any questions about any of these documents should be directed to, **Jay Marcotte, MPA, Director of Public Works, 617-993-2680 or at jmarcotte@belmont-ma.gov.**

BELMONT MASSACHUSETTS 02478

19 MOORE STREET

REQUEST FOR PROPOSAL

CONSULTING SERVICES
RECREATION STRATEGIC PLAN

PRICE PROPOSAL
BID FORM

_____, doing business at
Name of Firm or Individual

_____
Street Address City/Town

_____
State Zip Code

_____
Telephone number Contact Person

Total Bid Price:

_____

Total price shall be a lump sum and shall be all-inclusive including travel, printing, telephone and any other outside expense.

_____ _____
Signature Date

INSURANCE REQUIREMENTS

WORKMEN'S COMPENSATION: As required by the laws of The Commonwealth of Massachusetts.

GENERAL LIABILITY: Bodily Injury and Property Damage Liability. $500,000.00 each occurrence and $500,000.00 aggregate, combined single limit or $500,000.00/$500,000.00 with a $500,000.00 aggregate.
AUTOMOBILES & TRUCKS: Including hired and non-owned vehicles. Bodily injury liability $500,000.00 each person and $500,000.00 each accident.

PROPERTY DAMAGE LIABILITY: $100,000.00.

BELMONT MASSACHUSETTS 02478

CERTIFICATIONS

IN WITNESS WHEROF, the undersigned certifies, under the pains and penalties of perjury that:

1. It is in compliance with all of the provisions, and shall remain in compliance with the provisions for the life of any Contract resulting from this solicitation. That the bidder is qualified to perform any such Contract and possess, or shall obtain, all requisite licenses and permits to complete performance; shall maintain all unemployment, workers' compensation, professional and personal liability insurance policies sufficient to cover its performance under any such Contract; and shall comply with relevant prevailing wage rates and unemployment laws.
2. To the best of its knowledge and belief has paid all local taxes, tax titles, utilities, motor vehicle excise taxes, water and sewer bills to the Town of Belmont as required by law.
3. To the best of its knowledge and belief has filed all State tax returns and paid all State taxes required by law, and has complied with reporting of employees and contractors, and withholding and remitting of child support (MGL c.62C, s.49A).
4. Pursuant to MGL c.30B s.10 (or c.30 s.39M), this bid or proposal has been made in good faith and without collusion or fraud with any other person. As used in this paragraph, "person" shall mean any natural person, business, partnership, corporation, union, committee, club or other organization, entity or group of individuals.

_____ _____

Signature of Person Signing Bid or Proposal BY: Corporate Officer (Type/Print)

_____ _____

Corporate Name (Full Business Name) BY: Corporate Officer (Sign)

_____ _____

Social Security or Federal Tax ID# State of Incorporation/City of Business (DBA) Registration

Approval of a contract, or other agreement, will not be granted unless the applicant signs this certification form. You're Social Security number or Federal Tax Identification number will be furnished to the Massachusetts Department of Revenue (DOR) to determine whether you have met tax filing or tax payment obligations. The Town of Belmont is required to furnish a list to the DOR at the end of its fiscal year, showing the vendors, to whom more than $5,000 is paid during the twelve months, ending June 30. Providers who fail to correct their non-filing or delinquency will not have a contract or other agreement issued or extended. This request is made under the authority of Massachusetts General Laws, c.62C, s.49A

Executive Summary of the

FINANCIAL TASK FORCE

January 30, 2015

Office of the Board of Selectmen
Belmont Town Hall
455 Concord Avenue
Belmont, MA 02478

TOWN OF BELMONT FINANCIAL TASK FORCE

EXECUTIVE SUMMARY REPORT – JANUARY, 2015

Purpose of the Financial Task Force:

The Board of Selectman (BOS) established a Financial Task Force (FTF) in December 2013 with the purpose of developing a multi-year financial and capital plan. This plan is intended to allow policy makers and residents to understand current and future expenditure and revenue issues as well as the impact they will have on the ability of the Town to provide quality municipal and educational services and capital improvements.

Membership of the Task Force:

The Task Force was comprised of 13 members, including Town and School officials, elected officials, representatives from various committees, and residents. Some members were selected by the Chairs of their respective Boards or Committees.

- Board of Selectmen - Mark Paolillo
- School Committee - Laurie Graham & Laurie Slap
- Warrant Committee - Anne Helgen
- Capital Budget Committee - Anne Marie Mahoney
- Planning Board - Charles Clark
- Board of Assessors - Charles Laverty III
- Town Administrator - David Kale
- Town Treasurer - Floyd Carman
- Superintendent of Schools – Dr. Thomas Kingston (Thru 6/30/2014) & John Phelan
- School Finance Director - Anthony DiCologero
- Residents - Paul Lisanke & James Williams (Thru 1/15/2015)

In addition, four residents were selected to serve as a focus group to provide feedback and alternative perspectives during the process. These individuals were: Angelo Firenze, Andrew Levin, James Tzouvelis and Justin Amico.

The Task Force was supported by other town and school staff/consultants such as Assistant Town Administrator Phyllis Marshall, Town Accountant Chitra Subramanian, Director of Assessment Daniel Dargon, School and Town Human Resource Directors Mary Pederson and Diane Crimmins, and consultant James Conry.

Working Group Structure:

As part of the process, the Task Force reviewed a variety of programmatic topics for both the Town and Schools and formed Working Groups in each area:

- Group A - Education
- Group B - Revenue Opportunities
- Group C - Capital Projects
- Group D - Town Government (Programmatic Requirements and Opportunities for Structural Changes)
- Group E - Financial Projections

Some of these working groups will continue to meet in the future to provide recommendations to the Board of Selectman and the School Committee.

GROUP A: Education

Eight "Modeling Groups" were formed by the Schools to comprise the overall School Working Group. Participation within modeling groups involved School Committee members, Warrant Committee members, Town officials, School Department faculty and staff, and community members. The modeling groups reviewed financial and programmatic topics related to providing quality education and provided information to the Task Force in the development of the overall plan. The eight modeling groups reviewed the following topic areas; Salary and Compensation, Special Education, Enrollments, Operations and Maintenance, Instructional Modeling and Innovation, Revenue Sources, Student Services and Instructional Technology. A copy of each modeling group report is attached to this report.

GROUP B: Revenue Opportunities

This Group investigated opportunities for the Town to maximize non-property tax revenues. It also analyzed existing fee structures for revenues which fund the budget and will continue to do so in order to make future recommendations for changes, as well as conduct ongoing validation of our current fees in relation to other municipalities.

GROUP C: Capital Projects

The Capital Projects Group reviewed the status of current and future projects, analyzed debt service costs on major capital projects and the impact on the property tax levy, and prioritized major projects. In addition, the Capital Group reviewed allocations for pavement management, non-debt exclusion projects and other pay-as-you-go projects.

GROUP D: Town Government (Programmatic Requirements and Opportunities for Structural Changes)

This Group explored a variety of issues regarding service delivery for Town services. Examples of some of the areas that were discussed included: regionalization, consolidation, alternative service delivery models, establishing enterprise funds for certain activities, staff planning, and review of services that are not currently provided.

GROUP E. Financial Projections

This Group developed a working model to allow financial projections to be made based on data collected and recommendations made by working groups. The model created can be updated annually and used in the future to incorporate revisions in response to various budget assumptions and variables.

Key Findings and Recommendations:

The goals of the Task Force were:

- to produce a multi-year financial plan which would illustrate the ability of the Town to provide quality municipal and educational services and capital improvements based on the data and recommendations of the working groups
- provide an opportunity to investigate potential revenue sources and service delivery models
- analyze capital project funding needs and impacts
- collect data on revenue and expenditure historical trends, and project future estimates based on trends and various assumptions.

The following is a summary of Key Findings and Recommendations.

GROUP A: Education

Findings

As the new fiscal year began in July 2014 the Leadership Council of the Belmont Public Schools used the Modeling Group summaries to inform the work for the 2014-2015 school year. This will be the foundation for the next Strategic Plan process beginning in the spring of 2015. These eight modeling group reports have been and will be used as guiding documents for the school district.

The Leadership Council reviewed and analyzed the Modeling Reports in August 2014 over a three-day retreat. Each report was summarized by a small team and presented to the entire group. In the aggregate, the Leadership Council concluded that there were more needs than would be feasible to "ask for" in any single budget year and that a multi-year approach was required.

At the completion of the August review, there was a clear consensus that two of the modeling group reports and challenges were a priority: *Enrollment* and *Student Life (Social Emotional Learning).* The Leadership Council considered these two areas "pressure points" on the district that needed to be addressed immediately.

With that said, the Leadership Council attempted to keep the suggestions within an "acceptable" parameter, and to suggest a three (3) year plan to address the school department needs. These projections would only maintain our existing programs and supports for students.

Recommendations

1. Belmont Public Schools Projected Staffing Needs

Enrollment needs look different at each of the three levels (elementary, middle school, secondary). At the elementary level, the need to add a strand (another full class) at each grade level over time, with corresponding Unified Arts support, is essential. At the middle school level, the allocation of a grade five teacher will reduce class size in that grade only; a guidance position will address the ineffective 430:1 student:counselor ratio; and last but most importantly, two Unified Arts teachers, over two years, will begin to address the issue of middle school students not receiving direct instruction and sitting in large study halls each period. At Belmont High School, three teacher positions will be allocated to address the increasing number of students who are not engaged in learning during the school day. The number of unengaged students ranges from 96 to over 800 during certain days and mods (periods) during the week. The number of students not engaged in meaningful learning experiences during the school day is a wasteful and disturbing practice that needs to be addressed immediately.

The three-year staffing chart below also reflects the addition of two English Language Learner teachers. These positions are mandated by the state due to our increasing enrollment of this sub group within our overall student population.

Level	***Year One (SY 15/16)***	***Year Two (SY 16/17)***	***Year Three (SY 17/18)***
Elementary	1.0 Grade 4 Teacher (Wellington) * 1.0 Kindergarten Teacher * 1.0 Grade One Teacher *	1.0 Grade 2 Teacher*	1.0 Grade 3 Teacher*
Middle	1.0 Grade 5 Teacher * 1.0 Unified Arts Teacher(s) *	1.0 Unified Arts * 1.0 Guidance Counselor * #	
High	3.0 FTE's for Reduction of non-engaged/non-scheduled students *	1.0 FTE - Reduction of non-engaged/non-scheduled students * 1.0 Guidance Counselor *#	1.0 FTE - Reduction of non-engaged/non-scheduled students *
DW	2.0 English Language Learner Teachers*		1.0 Technology * 1.0 Instructional Technology Spec.* 1.0 SEL Staff Person *
Total FTE	**10.0**	**5.0**	**5.0**
	(*) Indicates Enrollment need (#) Indicates SEL need		

2. Aligning Budget Expenditures in Key Areas of FY15 Shortfall

Additionally, working with the Director of Finance and the Director of Student Services, areas were identified in the budget that were not fully funded and would need an increased allocation projection. These budget line items make up the majority of the current FY15 shortfall and thus need to be fully funded in FY16.

The areas are:

- **Special Services Contracted Service** budget line has steadily increased over the last several years. These are mandated services provided to our students with financial obligations that will need to be paid. This shortfall has reached approximately $425,000.
- **Out of District Students** budget line allocated funds on the assumption that the Belmont Public Schools would have 81 students to serve in the 2014/15 school year. By June of 2014 and continuing into the second fiscal quarter of this year (2014/15) that number has risen to 95. Over the past eight years the number of OOD students has fluctuated between these two counts (4 years in the 80's and 4 years in the 90's). The FY15 tuition shortfall is projected to be approximately $384,000. This amount will increase by approximately $276,000 in FY16 since LABBB (collaborative) credits used in FY15 to balance this line item will not be available in FY16. In past years, various federal and state grants and entitlement funds have been utilized to offset tuition cost increases, but these funds have either declined or been eliminated by funding agencies.
- **Special Education Transportation** budget line increased correspondingly to the increase in our aggregate enrollment and that of the increase in OOD students. The increase in this item in FY16 will be approximately $200,000.
- **Temporary Wages** -There are expenditures that exist in the public school budget each year that involve tutors, staff overtime, and stipends that cover work with special education students, summer early childhood programs, and summer programming that have not been budgeted sufficiently. Given the shortfall in this line for FY15 the recommended allocation to cover this line item in FY16 is $127,000.

3. Space Needs Due to Increased Enrollment

With the increase in enrollment the need for increased classroom space is inevitable. There has been a Space Task Force commissioned and an architectural firm hired to project the needs of the Belmont Schools, as it relates to increased enrollment and corresponding classroom space. There is a concern that at the elementary level, the system will need to increase by at least one additional strand (one more grade level class for each grade level K-4) to provide the capacity and ensure appropriate class sizes, based on School Committee class size guidelines. This would result in the need for modular classrooms and/or a more permanent solution by September 2016 at the elementary level.

Additionally, the space at the Chenery Middle School has been exhausted with the increase in students enrolled. The Chenery currently does not have enough space to support the current level of student enrollment and will not have the capacity to handle the current cohort sizes that are moving up from the elementary schools. As evidenced in the current enrollment chart, the wave of students moving up through the district is concerning. The increase in enrollment coming from the elementary level, combined with the need to provide classes and programs for those students in study halls, will result in the need for modular classrooms by September 2016. The permanent answer to the space needs at the middle school will need to be part of larger conversation of how we organize the district in future years. At this time the middle school presents the biggest concern from a lack of space perspective.

Belmont High School is out of space. Currently there are 31 rooms that are shared by 2 teachers and 4 rooms shared by 3 teachers. Given the need for additional class offerings for students who are not engaged during the day, and a wave of enrollment increases coming each year, the need for space at the High School is becoming critical. By way of example, the graduating class of 2014 at Belmont High School was 260 students. The 2014 entering kindergarten class was 354 and all five grade levels at the elementary level are over 330 students. Historical enrollment trends indicate there is little, if any, net loss of enrollment over the grade spans.

There are teachers who do not have their own classrooms and travel to two or more classrooms to teach. If we want to increase the number of teachers at the middle or high school to reduce the amount of unstructured, non-educational time ("frees"), the district will struggle with the ability to do so, without adding temporary space or building more permanent space.

It should be noted that these staffing projections only provide the needed respite in dealing with the increased enrollment and our communities' collective concern with our students' social emotional needs. There are no new programs or initiatives in this projection.

GROUP B: Revenue Opportunities

Findings

The Revenue Opportunities working group created a consolidated fee schedule and found that Belmont's current fee structure is competitive with those found in comparable municipalities. The working group confirmed the Town is pursuing all potential Payment-in-Lieu-of-Taxes (PILOT) opportunities to the extent possible and also confirmed all cellular towers within the Town are being assessed personal property taxes.

Increases to parking fees and parking permit fees were recommended to the Board of Selectmen this fall, and were approved. Implementation is estimated to achieve a revenue increase of $50,000.

Implementation of a commuter parking pass program is scheduled to be initiated in Belmont Center by the end of the current fiscal year.

Recommendations

The Revenue Opportunities working group developed the following recommendations:

1. The Town maximize revenue opportunities from Town and School recreational assets, including the Underwood Pool, Higginbottom Pool, and other existing recreation assets

2. Sell town owned parcels for residential development or defining a public purpose. These include:
   i. 130 Orchard Street 17,716 sq. ft.
   ii. 781 Pleasant Street 263,538 sq. ft.
   iii. 248 Mill Street 200,376 sq. ft.
3. Explore whether there is joint support from the Town and School Department for adopting a naming rights policy
4. Examine new growth opportunities at South Pleasant Street and recommend the Town re-zone this area to encourage redevelopment
5. Review building rental fees and recommend identifying opportunities for facilities fees and rentals
6. Upon completion of Cushing Village project, review surrounding parking management issues and opportunities
7. Implement March 2012 Parking Management Plan approved by Board of Selectmen after Belmont Center Reconstruction Project is completed
8. Create additional parking opportunities on Concord Ave (i.e. the vacant town owned lot to the right of JV Soccer Field)
9. Define and document direct services provided by the Town for each non-profit organization
10. Request from each non-profit organization a list of services they provide the Town
11. Seek financial support/partnership for upgrades of facilities used by nonprofits
12. Hire a new full-time professional Recreation Director to manage recreation facilities
13. Consolidate the management of Town and School recreation assets under experienced recreation management.
14. Combine the operation of the Higginbottom and new Underwood pools into an Aquatics Program.
15. Direct the Recreation Department, in conjunction with the Recreation Commission, to generate written policies, and evaluate and expand programming, outsourcing, and rental fees.
16. Create a "Field Management" task force of all stakeholders to determine usage, prioritization, fees, maintenance and upgrades and to coordinate improvements for both Town and School fields.

GROUP C: Capital Projects

Findings

The current Capital Budget operating budget allocation ("Pay-As-You-Go"), has averaged $1,346,000 over the last three years. This budget funds the purchase of major equipment and vehicles, sidewalk repairs, building improvements/repairs, facilities systems replacements, and

technology systems. The Capital Projects Group examined current and projected future needs and determined this budget is significantly under-funded. For example, the FY15 Capital Budget plan included over $4.5 million in legitimate (not "blue sky") requests, not including major library renovations. The budget to fund these requests was $1,395,000. In addition, another $1 million in capital repair/ replacement has been identified as a result of a recently completed Facility Study. This does not include any funding for portable classrooms, which may be required due to increasing enrollments and lack of existing classroom space.

The sub-group believes quite strongly that the annual Capital Budget must be increased to a level of at least $3.0 million a year to adequately keep up with the repairs, smaller renovations, and capital purchases that are necessary to keep all of the Town departments functioning efficiently *and* safely. Road and sidewalk repair alone could use an additional $3.0 million a year. Without adequate funding, the roads and sidewalks will continue to deteriorate, and equipment and repairs will not keep up with the needs of the departments. These needs are necessary to the efficient functioning of the Town and School departments and service to its citizens.

The annual Pavement Management Program has an allocation of approximately $1.8 million in FY15. The funding for this program contained in the Capital Budget is derived from Chapter 90 State Roadway improvement funds ($534,000) and from a property tax allocation ($1,284,000) based on a "roads override" approved by the voters several years ago, which is increased by 2.5% annually. Based on the limited funds for roadway repair, there is no predicable allocation for sidewalk repairs. A special one-time $200,000 allocation was approved in the FY15 Capital Budget.

Major capital projects have been successfully completed in recent years including:

- Construction of two new fire stations
- new senior center
- new Wellington School
- Harris Field Complex improvements
- Joey's Park
- Butler School Playground
- improvements to White Field House (privately funded)

Additional capital projects are in process or scheduled to be underway. These include:

- the new Belmont Light Sub-Station project (in process)
- Underwood Pool (in process)
- Belmont Center Reconstruction Project (in process)
- Trapelo Road Street and Sidewalk Reconstruction Project in collaboration with the State Department of Transportation (in process)
- It should be noted that the debt service for the Chenery Middle School ($1.1 million) is scheduled to be retired in FY16.

However, there are several major capital projects, most of which will require successful debt exclusions to fund the debt service in whole or in part depending on the project and available grants, Community Preservation Act Funds, donations or other sources. These projects include:

1. Belmont High School – estimated Cost $70,000,000 in addition to Massachusetts School Building Authority (MSBA) funding. The project has a site, a study, a cost estimate, and an

upcoming application submission before the MSBA. Applications for funding have been submitted for several years but not approved. Unfortunately, this year-to-year approval process makes it difficult to do long-term planning due to the uncertainty of the approval of the project. Please see the Capital working group report for a description of the MSBA approval process. Failure to receive funding in the upcoming round will require the proposed financing schedule to be adjusted, including cost estimates.

2. Incinerator Site – the site is ready to be permanently capped and built on for DPW, municipal or recreational uses, subject to conveyance to the Town by the State. The process of finalizing the conveyance of this site continues in collaboration with the Massachusetts Department of Capital Asset Management and Maintenance (DCAMM).

   Options under consideration include; multi-purpose recreational fields, ball fields, combination recreational/ball field use, solar farm, and a new police station. Estimated cost of athletic fields at this site is $2,000,000. All options for the site will include DPW materials and equipment storage use, since the current DPW site cannot accommodate this use.

3. DPW Facility- estimated cost is $28,000,000 if the project is constructed at the existing location. A plan and a reasonably updated cost estimate are required to proceed.

4. Library – estimated cost is $18,000,000 in addition to Grant and private funding. A decision to renovate/construct on existing site or elsewhere needs to be made by the Library Trustees for the next Massachusetts Library Board of Commissioners grant round. This includes planning and updating the previous feasibility study and cost estimates.

5. Police Station - estimated cost for new building is $20,000,000. Needs a site, a plan, and a cost estimate to suit the site. Program specifications from a prior study are defined but need to be updated to consider a new building instead of using the current library building. The Incinerator site is an option, which allows the project to be ready to proceed. Otherwise, the current site, which includes the Light Department building, is not ready for 4-5 years until the sub-station located in the Light Department building is decommissioned.

   Inadequate parking at the existing site will not be resolved unless underground parking is considered as part of the project.

   Additional conversations with the Historic District Commission need to take place to explore options for existing buildings (Light Department building and existing Police Station). This includes renovations for a new police station or sale of the current site with the buildings for a commercial or residential use.

The total of these projects is approximately $138,000,000. The total debt service cost is estimated at $206.6 million from FY16 through FY43. In addition, the Town may be faced with the cost of funding renovations or new construction of a Minuteman Vocational High School.

Recommendations

1. We are recommending that $500,000 in additional funds from property taxes - $300,000 for roadway improvements and $200,000 for sidewalk repairs - be added to the Task Force Financial Model to address these needs. This will allow a regular annual $200,000 allocation for sidewalk improvements within the plan, in addition to $1.8 million annually for roadway improvements. If approved, these additional allocations will be coordinated by the Community Development and Public Works Departments and can be completed within the normal construction cycle.

2. The estimated FY16 Capital Budget available funding totals approximately $1 million. We are recommending that additional funds for debt service payments on $1 million in bond financing ($500,000/5-Year term in FY16 and $500,000/5-Year term in FY17) be added to the Task Force Financial Model to address capital budget needs, and also provide permanent ongoing funding in the future, once the 5-year bond issues are paid-off.

3. Based on the fact that another application must be submitted for the High School Project to the Massachusetts School Building Authority (MSBA) in spring 2015, and state funding may still be several years away, it is recommended that;

    a.) a decision on the post-closure use of the former Incinerator Site be made as soon as possible. This will determine the possible location and timing of a new Police Station and the potential (or not) of an athletic field installation or other uses at the site.
    b.) otherwise, the DPW facility should be the next major project to be funded and initiated, which has a location and should move forward with planning.
    c.) a decision to renovate/construct on existing site or elsewhere needs to be made by the Library Trustees for the next grant round. This includes planning and updating the previous feasibility study.

GROUP D: Town Government (Programmatic Requirements and Opportunities for Structural Changes)

Findings

Across the state, local aid in the last thirty years has declined by 58% from 1982 to 2012; in Belmont, that drop was even more pronounced at 63%. The Town has tried to provide the same levels of service to residents despite cuts in funding which have led to reduced staffing levels and resources.

Town departments have incurred staffing reductions over the years and are continuing to do more with less. Over the last 20 years Public Works permanent staff has been reduced by 26% and seasonal staff by 58%. This has led to a reduction of service over the years, including reduced maintenance, street sweeping, litter collection, and roads and sidewalks minor repairs. In addition, Fire and Police staffing have been reduced by 10 positions. Further reductions will require elimination of core services.

Town departments currently participate in many collaborations and regionalization efforts with other municipalities, collaboratives and state agencies to increase efficiencies and cost savings. Grant funding is also explored by Town departments. For example, the Fire Department recently received a Federal SAFER Grant to fund two firefighter positions for two years to allow the department to deal with significant vacancies due to retirements that will occur in the next few years.

What became clear throughout the process of examining town government in Belmont is that departments are stretched extremely thin in terms of resources. Many are operating at staffing levels that are significantly reduced from 10 or 20 years ago with facilities that are long past their useful lives. This has, in many cases, led to a slow erosion of services. Another conclusion is that Belmont has been fortunate to have senior leadership in a number of key departments that have become adept at making the most of those resources. A number of these experienced people have recently retired or are approaching retirement.

Recommendations:

- Establish an incentive bonus pool for department heads and other employees to reward them for the development and implementation of innovative and cost saving ideas.

- Continue to explore opportunities for collaboration and/or regionalization with surrounding communities in the delivery of Town services.

- Establish a working group of town administrators/managers with comparable communities to enable the sharing of innovative ideas and solutions to the common challenges we face in the delivery of town services, effective management of our increasing cost infrastructure and the generation of additional non-property tax revenues.

- Work more closely with and join our state legislators to lobby for changes at the state level in the current pension system and for additional healthcare reform to more effectively manage our burgeoning Other Post Employment Benefit (OPEB) Liability.

GROUP E. Financial Projections

Findings

Over 80% of the annual Belmont budget is funded from property taxes. An additional 9% is funded from state aid. The remainder is funded from other local revenues, free cash, and other available funds. The Town's ability to maintain town and school services and invest in its infra-structure (capital) will require additional property tax resources beginning in FY16.

Generally, over the past five years, actual revenues have slightly exceeded budget estimates and actual expenditures have fallen slightly below budget estimates. This has resulted in the Town having the ability to maintain a prudent free cash position and add to some reserves, such as the OPEB Trust Fund. Based on projections for the next five years, it does not appear this condition will continue without significant new revenues and/or major program and service reductions.

The School budget has been structurally insufficient for the past few years. As evidence, the following was noted;

- the School budget for FY14 was in deficit and required supplemental funding from the Reserve Fund
- the FY15 budget is projected to be in deficit by at least $500,000. This has resulted in freezes in staff hiring and the purchase of materials in this year (as well as FY14). While the deficit amount is a net amount of $500,000, it is actually higher since monies are frozen in various accounts to internally reallocate to cover expenditures in excess of budget in other areas, primarily in the Special Education category
- the ability in previous years to use school reserves from revolving funds, Special Education (SPED) State Circuit Breaker funds, and Special Education Collaborative credits has been fully depleted and exhausted
- in the last three years, school enrollments have increased by over 300 students. It is projected that enrollments will further increase by 300 students over the next three years. Average elementary class sizes have increased to 24 in the current school year
- state-mandated SPED services, including contracted services, SPED tuitions from increased enrollments, and related transportation services have increased beyond budget estimates.
- the number of SPED tuitioned-out students has increased by 14 since June 2013. Also, the enrollment of English Language Learner (ELL) students requiring services has increased by 105 since 2013.

The Financial Modeling Group received information provided by the working groups and analyzed past and current year expenditures and revenues. It developed revenue and expenditure assumptions in order to develop a financial plan for FY16-19.

As a result, it is projected that there will be a total funding shortfall (a "funding gap") of $7,743,000 by FY19. There are projected shortfalls of $2,870,000 in FY16, and $4,448,000 in FY17 after accounting for available revenues to fund the budgets. Note that these are *cumulative* shortfalls.

The accompanying financial tables detail the revenue and expenditure assumptions underlying the Five-Year Financial Projections (FY15-FY19). Generally, the assumptions are based on a posture of *maintaining* existing programs and service levels in town departments and the schools. New initiatives and programs, except where funded through internal reallocations and efficiencies, are not projected, with the exception of items 1 through 3 below;

1. $500,000 added to the Capital Budget beginning in FY16 to fund an additional $300,000 for roadway improvements and $200,000 for sidewalk repairs.

2. $120,000 added in the FY16 Budget, and an additional $120,000 in FY17 to fund debt service costs to issue $500,000 in municipal bonds each year to support capital projects. The result of these additions will mean $1,000,000 in capital improvements can be funded, still well short of the annual requests.

3. $650,000 added to the FY16 School budget for the addition of 10 teaching positions to address the recommendations of the School working group relative to enrollment increases over the past three years and projected for FY16; $325,000 is proposed as an addition to the

FY17 School budget and an additional $325,000 in FY18 for 5 additional teaching positions each year. The additional costs of 5 positions is continued in FY18 and FY19.

In addition, the following items have been added to deal with insufficient funding for specific items in the School budget over the past few years, primarily in Special Education accounts. These amounts are needed to correct this situation and pay the bills.

1. $642,000 added to the FY16 School budget to adequately fund the cost of Special Education (SPED) tuitioned-out students based on FY15 estimated costs and an increase in the number of students. This included accounting for one-time funding of $276,000 from LABBB credits (a special education collaboration of which Belmont is a member), which was used in the FY15 budget but will not be available in FY16.

2. $205,000 added to the FY16 School budget to adequately fund the cost of Special Education Transportation budget related to the number of SPED Tuitioned-out students based on FY15 estimated costs and an increase in the number of students.

3. $425,000 added to the FY16 School budget to adequately fund the cost of Special Education Contracted Services to provide required services to students who are on an Individual Education Plan (IEP) based on FY15 estimated costs and an increase in the number of students serviced.

4. $127,000 added to the FY16 School budget to adequately fund the cost of Temporary Services. The Temporary Services Budget covers the cost of items such as tutoring services, overtime, substitute teachers and staff development.

Major Revenue assumptions, in addition to the 2 ½% increases in the property tax levy, include the following and are contained in the financial projections model:

1. $207,000 in additional Motor Vehicle Excise Tax Revenues in FY16, with a 2.5% increase thereafter
2. $205,000 in estimated additional building permit fees in FY16, with a 2.5% increase thereafter
3. $50,000 increase in FY16 meter fees and parking permit fees as a result of the recommendations made by the Revenue working group and approved by the Board of Selectman
4. $221,000 in estimated additional property taxes in FY17 as a result of new projects (Cushing Village and Uplands); in addition, $328,000 in FY18 and $430,000 in FY19.

Recommendations:

1. The Financial Working Group recommends that the Board of Selectmen, School Committee, Town Officials, Warrant Committee, Capital Budget Committee, Town Meeting Members, Town Departments, and the Schools Administration utilize the FY15-19 Financial Projections as a framework for future budget planning, subject to annual adjustments and updating of assumptions as future events unfold.

2. The recommendations of the Revenue Opportunities Group be considered and implemented after review. Some recommendations may not be implemented until FY18 or beyond but could serve as a source of additional revenues.

3. The Financial Working Group is well aware that an override to provide an additional $7.7 million in operating funds would result in a major increase to property taxes to homeowners. It is estimated that a $1 million increase to the property tax levy translates into approximately $150 increase to the average single family home owner. Further, residents will likely be asked in the future to consider funding major capital projects such as the High School, DPW facility, Police Station and Library.

4. The Financial Working Group recommends that a $4.5 million operating budget override would provide stability to Town and School budgets for the next two fiscal years, FY16 and FY17, with an opportunity to extend budget stability to FY18 with prudent spending practices, positive changes in estimated revenues and expenditures and the raising of the total $4.5 million in FY16. A $4.5 million increase in property taxes is a solution which allows the Town to budget adequately to cover its actual costs for Special Education services, deals with increased enrollments and class sizes in a phased approach, provides additional funding for street and sidewalk reconstruction and capital improvements and the maintenance of Town services, which have been reduced over several years, while being sensitive to the taxpayer.

5. If an Override is approved, it is important to enable the portion of the override funding (approximately $1,630,000) to be set aside and reserved. A means of accomplishing this is to establish an "Override Stabilization Fund", into which those funds ("excess levy capacity") can be placed until needed. Any funding from this reserve would require a vote of Town Meeting in order to be authorized for expenditure. This Stabilization Fund might also be a vehicle to reserve other available funds, such as one-time revenues or revenue/expenditure "windfalls", for future budget use, all subject to Town Meeting authorization. Therefore, the Financial Working Group recommends establishing an "Override Stabilization Fund" to enable excess levy capacity and other savings to be used in future years.

6. Therefore, it is recommended that the Board of Selectmen vote to include a $4.5 million override on the ballot.

Recreation Revenue Opportunities
Revenue Opportunities Subcommittee
Financial Task Force
Approved by the Financial Task Force May 11, 2015

Objective:

As part of the Financial Task Force, the Revenue Opportunities Subcommittee has been charged with identifying new sources of non-property tax revenue and to make recommendations for changes.

The Subcommittee identified recreation as an area that can generate new revenues to cover existing and future operating, maintenance and capital costs. One other idea was briefly considered: outsourcing the management of the Recreation Department. However, it was determined that this would require significant changes contemplated herein that are not solely under the aegis of recreation, and therefore, outsourcing at this time would not be cost effective. Evaluation of these ideas should be revisited once objectives of the town are agreed upon.

The recreation departments of nine comparable towns, as defined by the Financial Task Force, were reviewed: Arlington, Bedford, Burlington, Lexington, Watertown, Wayland, Wellesley, Westford, and Winchester. None of these towns operate a town or school owned indoor pool; therefore, comparables for the Higginbottom Pool include Acton-Boxborough, Dedham, Milford, Sudbury, and Westwood.

Summary:

As municipalities grapple with the constraints of providing services under the constraints of Prop 2 ½, many towns similar to Belmont have recognized that recreation programming and assets are vital to the quality of life they seek to offer and important community asset. In order to fund operating, maintenance and improvement of recreational facilities, comparable communities are generating new sources of revenues through increased participation and utilization, market rates for facility usage, and expanded non-resident use. Many towns are operating their recreation departments as "self-supporting" entities, through Recreation Enterprise Funds, community use programs, revolving funds and other mandates. While not all are successful covering total all-in costs with fees, it is apparent that peer communities are balancing the desire to provide programming that is affordable and engages a diverse and broad segment of the community with the need to leverage the costs of existing recreational assets.

Belmont's valuable town-wide recreational assets have the potential to generate significant new revenues by adopting a similar model. Historically, however, oversight of these assets has been fragmented, and revenue generation has not been prioritized. Existing programming, rental fees, and usage have developed ad hoc over several decades without a framework for analysis or an understanding of the all-in costs of delivering services. In spite of market demand for access to facilities and fields, rates charged to non-resident users are often below those charged in surrounding towns.

Generating new sources of revenues will require a detailed understanding of direct and indirect costs, clear policies, a new mindset, and experienced management. The town, school department, athletic leagues and recreation commission will need to reduce the barriers that exist and that prevent the effective and efficient use of town assets. This will require committed leadership and entail tremendous time and effort and--most of all--changes in "the way things have been done." However, these changes will provide real budgetary and quality of life enhancements for the community.

Peer communities such as Arlington, Bedford, Lexington and Winchester generate revenues of $1.2-1.5 million per annum through self-supporting models, in comparison to Belmont's FY13 revenues of $792,000. These communities are able to fund all-in operating, maintenance and a portion of capital costs with user fees; for example, Arlington and Lexington's Recreation Enterprise funds each pay $85-100,000 in debt service per annum on town issuances used to upgrade facilities. This is accomplished at affordable rates, with similar staffing levels, and without the combined recreational assets enjoyed by Belmont.

For FY15, the Recreation Budget projects revenues of $700,000 and expenses of $832,000 for a net use of $132,000, not including capital and maintenance costs borne by the Town, such as the Harris Field turf replacement (approximately $1 million), Higginbottom Pool repairs and upgrades ($80,000 budgeted for FY15), debt service for the new Underwood pool and other such costs. The Recreation, Town and School budgets also do not include extensive field upgrades and maintenance of the Grove Street, Winnbrook, Pequosette, Town and High School and JV fields over the last 8 years paid for by the Belmont Soccer Association, Belmont Second Soccer and Belmont Youth Lacrosse, Belmont Youth Baseball and the Brendan Grant Foundation.

Belmont can learn from comparable towns that have migrated wholly or partially to a self-supporting model, offering more and diverse programming, more efficiently, and more widely. There exists high demand for use of recreational assets —pools, fields, indoor space—by residents and non-residents alike, which the town is does not manage effectively or efficiently. Expanded programming, coordinated field usage and off peak, non-resident market rate rental rates can offset high operating and capital costs. Our analysis indicates that Belmont can conservatively generate $165,000-$330,000 per annum in new net rental and programming revenues within three years to fund existing expenses. With experienced management and the support of town leaders, Belmont has the potential to operate town and school recreational assets as truly self- sustaining over the long term.

Key Findings/Opportunities for Belmont

- Belmont is fortunate to have combined recreational assets not found in peer communities. None of the nine comparable towns has a town owned indoor swimming pool and only one—Lexington—operates an outdoor pool. Only three own hockey rinks, and some towns do not have field houses. (Appendix I) While several communities have additional dedicated space, Belmont does not compete for participants with local recreation facilities such as Arlington Boys and Girls Club and Fidelity House in Arlington, Hayden Recreation Center (a private non-profit) in Lexington, and for-profit gyms and facilities such as Boston Sports.

- Of the nine comparable towns, Arlington, Lexington, Westford and Winchester have adopted Recreation Enterprise Funds (REFs). REFs account for all recreation expenses, including direct and indirect operating costs, maintenance, and capital costs, and program costs are used to set fees. Excess funds remain within the REF and fund program expansion and capital upgrades. Arlington, for example, financed the majority of a $2 million upgrade to its hockey rink through its enterprise fund. The cost of delivering programs and the benefits derived from fees are clear to the users since excess revenues are not returned to the general fund but used to expand programming and improve facilities. These communities also report that understanding and matching revenues to costs also results in greater efficiencies.

  With few exceptions, other peer communities are focused on utilization rates, consumer driven programming and matching revenues to expenses through revolving funds and other mandates. While not all of them cover total operating expenses and maintenance, these towns are ahead of Belmont in efforts to understand costs and leverage assets.

- Dedham, Milford, Sudbury and Westwood have adopted self-supporting models to cover the significant year-round costs of indoor school pools. These pools generate $100,000-200,000 per annum through market rate rentals to non-resident users, expanded hours and creative programming. Milford, through its self-supporting Community Use Program, recently funded a $50,000 filtration system for its indoor pool. All of these pools are managed outside the School Department in the respective towns.

  Belmont's Higginbottom pool costs the School Department an estimated $200,000 per annum in operating fees, not including staffing or capital costs[1]; the pool currently generates minimal revenues. A pool rental rate study shows that Belmont charges rates significantly below market to a non-resident elite team. (Appendix II) Other revenue opportunities include: additional team and club rentals, expanding hours to allow adult lap swimmers, birthday parties and additional programming.

  Outdoor pools can be net cash generators, both directly and indirectly through camps. A two-pool configuration for the new Underwood Pool offers the opportunity to double programs throughout the morning or rent to summer swim teams, offer evening swim lessons, and generate rental revenues for low demand hours with rentals and birthday parties. A new facility also presents the opportunity for the Recreation Department and the Recreation Commission to rethink and review the fee schedule, especially with regard to non-resident usage, and consider expanding the season, as well as the hours it is open to allow this valuable asset to be utilized as much as possible.

- Peer communities recognize that field use is at a premium and that maintaining and

---

[1] USASwimming .org/facilities development: "The average annual operational cost for a new 15,000 square ft facility that houses 6 or 8 lane 25 yard pool in a seasonal climate in a suburban population would be $210,000 (not including staffing)."

upgrading fields is an important, yet costly, undertaking that requires the coordination of the recreation department, the school department, the DPW and the user groups. All of Belmont's comparable communities have written policies covering usage requirements and permits, priority of use, and applicable fees for town and school fields. All but one of Belmont's peer communities issue permits for both town and school fields through their recreation departments. (Appendix III and V)

As the number of organized sport teams and participants have dramatically increased in recent years, and the demand for field space has intensified, towns such as Burlington, Winchester, Wellesley, and Wayland have created field management task forces or commissions comprised of representation from town, school, league and pubic stakeholders. The goal of these groups is to determine usage of the fields, plan maintenance and capital upgrades to the town and school fields and to set fair and consistent policies, fees and priorities for usage.

All of the comparable towns in this analysis charge field fees for town and school fields, ranging between $20-$125 per hour to $7-$40 per participant per season. Fees are based on the user group and residency percentage and use of turf or lights command additional fees to cover higher expenses; non-resident groups often pay $150 -$225 per hour. Youth league field fees do not increase cost to the participants, but are paid to the town for maintenance, upgrades and other amenities out of fees collected by the leagues. To ensure transparency, several towns (e.g., Bedford, Westford, Winchester) have dedicated field fee revolving funds that ensure funds collected from such fees are used exclusively for field expenses.

In Belmont, private, non-profit youth leagues have donated time, effort and significant funds generated by participation fees to upgrade, re-sod, reseed, aerate, irrigate and maintain both town and school grass fields. Many of the upgrades are capital projects that the Town would not be able to fund, and some of the projects have resulted in a net decrease in ongoing maintenance and costs for town fields. From the perspective of the DPW, Recreation, and the youth leagues involved, this arrangement has worked well to date. However, lack of consistent, written policies for town and school fields has contributed to a lack of clarity on priorities for usage.

Belmont has the opportunity to generate significant new revenues from charging market rates to non-resident, camp and clinic users of town and school fields. Harris Field is currently not rented to any groups and both town and school fields get minimal use during the summer. Watertown, which does not charge field fees to youth leagues, generates $130,000 per annum in turf and light fees from non-resident groups (BC and BU) during off peak hours.

- Revenue generation and make up varies by town, reflecting demographics, location and types facilities. However, an analysis of comparable towns indicates peer communities offer a broader array of programming across all age groups, and create efficiencies by outsourcing programs. An analysis shows that participant fees are, in general, no higher than those charged in Belmont for similar programs. (Appendix

IV) Affordability, access to programs and broad participation are an important mission of all recreation entities surveyed.

Opportunities for Belmont to generate new sources of funds without significant investment and without burdening existing users include:

- Market rate rentals for non-resident usage of town and school fields and facilities, especially for teams, camps, and clinics. Typically, camp and clinic providers are charged a "per participant" or 20-25% percentage overhead fee for use of facilities, rather than a flat fee;
- Outsourcing programming to third party providers which broadens offerings without incremental expenses;
- Expansion of programming to include new or underserved residents such as toddlers and preschoolers (soccer, gymnastics, multi sport and arts); alternative sports for all ages (fencing, badminton, ultimate Frisbee, futsal, dodgeball, flag football); adult outdoor and exercise programs (Crossfit, biking, bootcamp); and additional enrichment programs (chess, legos, science and art);
- Additional town-run camps, pre and after care programs and adult leagues, which are often net cash generators;
- Increased utilization of facilities through:
  - Weekend and off peak programming and usage
  - Expanded hours of operation
  - Non-resident rentals for off peak hours
  - Instructional classes which are shorter in duration (ie, tennis lessons).

Recommendations

The Subcommittee recommends that the Town hire a full time Recreation Director to generate new sources of revenues, expand programming and create additional efficiencies. The revenue ideas contained herein require an investment in a dedicated professional who has the mandate, experience and energy to seek out and understand the needs of the community and leverage the costs of existing assets through new usage and creative programming.

This person should have a degree in Recreation Management and 4-7 years managing recreation facilities (an aquatics background would be a plus). To mitigate risk, the town should consider hiring the director with under a 3-year contract with specific goals. If, at the end of the contract, new funds have not been generated to cover the total annual cost of the director's position plus an amount to be determined, the contract would end and the town could consider other alternatives for the Recreation Department.

Estimated Costs : $100,000 per annum (per David Kale)

The Subcommittee recommends that Belmont consolidate the management of town and school recreation assets under experienced recreation management. A professional manager will bring a broader and more consistent discipline to understanding the direct and indirect costs, the town-wide and non-resident demand, and the

opportunities for maximizing the value of these assets. Under the current fragmented system, the town is not realizing market rates or maximizing utilization of its assets. This is especially true of school assets, where it is not the core mission to manage rentals and non-school related scheduling. Merging the management of these assets will increase transparency and flexibility for the benefit of all stakeholders.

Additionally, the Subcommittee recommends combining the operation of the Higginbottom Pool and the new Underwood Pool into an Aquatics Program.

Assign a dedicated aquatics manage to focus solely on these two assets, which operate in complementary seasons and serve similar user bases. The indoor pool is a costly asset that does not serve the core mission of the public schools. Outdoor pools, in spite of a short season, are able to generate net operating cash under experienced management.

The town currently has a seasonal, part-time supervisor for the Underwood Pool. This position could be redefined to capture the year round nature operation of both pools.

The Subcommittee estimates that Belmont's aquatics facilities can generate a total of $150,000-$225,000 per annum in new net revenues within a three year time frame.

The Subcommittee recommends that the town create a Field Management Committee of stakeholders to determine usage, prioritization, maintenance, upgrades and revenues and coordinate donations for improvements for both Town and School fields. A Field Management Committee would help balance the requirements of the various (and ever increasing) athletic groups with other needs, including the town's need to generate additional revenues to maintain and improve its assets. Peer communities that have adopted this model--Wayland, Wellesley, Winchester and Burlington–all report improved communication and utilization of fields.

The Committee would include representation of the DPW, the Recreation Department, the School Department, the Recreation Commission, Facilities, citizens and each of the youth leagues using the fields. The purpose would be to replace the ad hoc and disparate process that currently exists with one that is fair, consistent and transparent.

The scope of the Field Management Committee would include:

- Develop consistent written policies that address all of the parties needs;
- Determine the current and projected operating, maintenance and capital costs of the fields, and match expenses and capital costs to sources of funds;
- Set policies, usage time and market rates for non-resident groups and camp/clinic use of fields and evaluate other opportunities to generate revenues without compromising field conditions;
- Compare the existing model with field fee models of other towns in more detail to ensure that Belmont's model best suits the town.

Based on comparable communities, it is conservatively estimated that field revenues from camp and clinics, and increased off peak usage and charges range between $100,000 - $150,000 for Harris Field alone.

While we are not recommending resident/youth league field fees at this time, we note here that, based on an estimated 6,000 participants, charging per sport/season, field fees could generate $60,000- $240,000 (gross) per annum for the Town. Field fees would be offset by the cost of taking on what private organizations currently provide.

The Subcommittee recommends that the Recreation Department work in conjunction with the Recreation Commission to generate written policies, expand programming, users and utilization, outsource programming and identify efficiencies, and evaluate provider and rental fees. Engaging more citizens in a creative and efficient manner while seeking opportunities to fund expenses is a win-win for Belmont. It is highly recommended that the Recreation Department and Recreation Commission contact the Arlington, Bedford, Lexington and Winchester recreation departments for an understanding of what programs and providers have been successful in those towns.

The bulk of net revenues from programming will come from: outsourcing new programming at a rate that funds overhead expenses; additional camps and clinics or other programs; and new non-resident usage and market rate rentals. The Subcommittee estimates that incremental new revenues from these sources will be $25,000-65,000 per annum to fund existing expenses within a 3-5 year time frame.

Estimated Impact

By adopting these recommendations, Belmont will recommit to vibrant and diverse recreation programming, generate funds to maintain and upgrade facilities, and create budgetary enhancements without burdening taxpayers. A simple, preliminary and conservative estimate of new revenues that could be generated within three years, net of additional expenses, is between $165,000 and $330,000 per annum. This estimate reflects a partial analysis only; opportunities for the hockey rink, field house, and other indoor facilities have yet to be identified. Even small changes can yield meaningful results, as evidenced by a change in schedule at the rink in FY 14 that resulted in $15,000 in additional revenues without additional expense. Additionally, the analysis does not include what, if any, benefit field fees would generate relative to town field expenses.

Aquatics Facilities	$150,000-$ 225,000
Non-Resident Field Fees	$100,000-$ 150,000
Programming and Service Delivery	$ 25,000-$ 65,000
TOTAL Net Programming Revenues	**$275,000-$440,000**
Recreation Director (incl. benefits)	($100,000)
Misc. Start Up Costs	($10,000)
Net Incremental Revenues	**$165,000-$330,000 per annum**

Appendix

I Comparable Town Selected Recreation Information

II Suburban Non Resident Pool Rental Rates

III Summary of Field Fees for Comparable Towns

IV Fee Comparison of Selected Programs

V Field Oversight in Comparable Towns

VI Private Donations to Belmont and School Fields and Facilities for Maintenance and Improvements, 2007-2014

Appendix I
Selected Recreation Information for Comparable Towns
As of June 2014

	Belmont	Arlington	Bedford	Burlington	Lexington	Watertown	Wayland	Wellesley	Westford	Winchester
FY13 Rec Revenues (000)	$792	$1,500	$1,500 Rev Fund	$569 (excl. rink)	$1,156 (ex.golf course)	$400 (excl rink)	N/A	$1,000	$1,143	$1,536
FY13 Rec FTE	5.1	3.1	4	4	5.3	3	2	3	3	4
Enterprise Fund?	No	Yes	No Rev. Fund	No Rev. Fund	Yes	No	No	No Rev. Fund	Yes	Yes
Field Fees?	No	Yes	Yes	Yes	Yes	Non res only	Yes	Yes	Yes	Yes
Indoor Pool	Yes	No	No	No	No	No	No	No	No	No
Outdoor Pool	Yes	No/Pond	No	Wading Pool Only	Yes	No	No/Lake	Pond	No	No/Pond
Hockey Rink	Yes	Yes	No	Yes Run by priv. co.	No	Yes	No	No	No	No
Pre School	No	Yes	No	Yes	No	No	No	No	No	Yes
Pre/ Aftercare	No	Yes	Yes	No	No	No	No	No	Yes	Yes
Special Needs	S.P.O.R.T.	S.P.O.R.T.	No	No	No	S.P.O.R.T.	No	No	No	No

Notes:

- FTE equivalents taken from available budget reports, recreation brochures and direct contact and do not include pre-school or pre and after care FTEs.
- Buildings listed include town or school owned facilities only.
- Some of these towns have a recreation building, youth center, or other additional space, which allows for additional programming.

Appendix II
Suburban Non-Resident Pool Rental Rates
April 2014

Public	Pool Size	Non Res Rate/Hour	Add'l Fees	Ttl Non Res Rate/Hour	Comments
BELMONT	**6/25 yds**	**$10-15**	**n/a**	**$10-15**	
Acton Boxborough	6/25 yds	$100	$48-58	$148-58	Through A-B Comm Education
Brookline Pool	6/25 yds	$135	incl	$135	Menu based fees
Dedham Comm Pool	6/25 yds	$50*	incl	$50	Relooking at fees
Camb War Mem.	6/25 yds	n/a	n/a	n/a	No response
Keefe Tech	6/25 yds	$120	$42	$162	Member town rentals not disclosed
Milford	6/25 yds	$125	inc	$125	Community Use Program, self supporting
Minuteman Tech	25 meters	$100	$30-58	$130-158	50% for non profit or memb town youth gp
Sudbury Pool	8/25 yds	$120**	incl	$120	Rec Ent, self supporting
Westwood Community	6/25 yds	$100	incl	$100	Self Supporting Pool at HS, run by Town
Non Profit					
Arlington Boys and Girls	5/25 yds	$100^	incl	$100^	5 lane pool; local swim team @ $90/hr
Lexington Hayden	6/25 yds	n/a	n/a	n/a	Non profit; no team rentals
Watertown Boys and Girls	5/25 yds	$100^	incl	$100^	5 lanes; discount for mult days and months
Wayland Community Pool	10/25 yds	$120**	incl	$120	Non profit
Private					
Babson	6/25 yds	$85-100	incl	$85-100	Reg team rental@$85
Bentley	10/ 25 yds	$90(est)	n/a	$90 (est)	Only rent to one team; $7000/mo x 12 mos.
Boston University	16/25 yds	$130	n/a	$130^^	5 lane rental, non affiliate
Brandeis	6/25 yds	n/a	n/a	n/a	No response
Dana Hall	6/25 yds	n/a	n/a	n/a	No response
Harvard	multiple	n/a	n/a	n/a	3 pools; no response
MIT	multiple	n/a	n/a	n/a	Do not divulge rates
Regis College Pool	6/25 yds	$105	incl	$105-135	More if guards provided by Regis
Wellesley College	8/25 yds	$150	incl	$150	Less for town use; more for large meets

Addl fees include custodial, weekend and admin. Non-resident rate/hour assumes no lifeguard fees.

*Flat fee per team; per hour rate is estimated by compiler. Town is reviewing fees.

^ Five lane pool; fee for 6 lanes at this rate would equal $120 per hour. ^^5 lane pool; 6 lane rental=$156/hr

Appendix III
Summary of Field Fees for Comparable Towns
As of May 2014

	Field Fees Charged	Supplemental Light Fees	Turf Fees
School and Rec Dept Usage	Generally, none;	$25-$50/hr	Generally, none;
Charged by:	Arlington charges per participant and Wellesley for clinics	Lexington, Winchester	Lexington charges $25 fee
Town Youth Organizations (90%+ Town Residents)	$7.25-$40.00/ participant;	$20-$50/hr	$20-$125/hr
Charged by:	All, except: Burlington and Watertown do not charge youth leagues; Westford flat $27K fee/league	Lexington, Watertown, Wellesley, Winchester	Lexington, Wellesley, Winchester
Other Youth Organizations/Groups Based on a percentage of resident participants	$20-$80/hour OR $30-$40/participant plus lights	$20-$40/hr or $50-$100/use	$20-$125/hr
Charged by:	All Comparable Towns	Burlington, Lexington, Watertown, Wayland, Wellesley, Winchester	Lexington, Watertown, Wayland, Wellesley, Winchester
Non Resident Groups	$30-$120/hr plus lights	$25-$125/hr	$60-$125/hr OR $275/use
Charged by:	All Comparable Towns	All Comparable Towns with lights (ex. Arlington)	All Comparable Towns with Turf Fields (ex. Arl/Burl)
Private Camps, Organizations, Clinics	Varies from 15% of gross revenue to $35-50/participant OR up to $2,500/week	Up to $125/hr	$40-100/hr OR $50/participant add'l
Charged by:	All Comparable Towns	All Comparable Towns with lights (ex. Arlington)	All Comparable Towns with Turf Fields (ex. Arl/Burl)

Notes: Fees are used to fund field maintenance, upgrades, administration fees and other amenities. Chart shows range of fees charged by towns indicated for each category of users. Light fees are supplemental to field and turf fees. Some towns do not have lighted or turf fields.

Appendix IV
Fee Comparison of Selected Programs 2013-14

	Belmont	Arlington	Lexington	Winchester
Swimming Lessons	$58/4 days	$60/? Days	$40/10 days	No town pool
Summer	45 min	40 min		currently
	plus membshp	plus membshp	plus membrsp	
Beach/Pool Membership				
Family	$225 2 ad/ 4 ch	$135 2 ad/2 ch	$225 2 ad/ all ch	No town pool
Add"l child	$10	$20	n/a	currently
Child only	$100	$30	n/a	
Adult/Senior	$140	$45/$30	$75/$50	
Baseball (8 and up)	$233/week	$145/week	$160/week	
Summer Camp	$221/week	$175/week	$205/week	$215/week
Grades K-5	8:30am-3:30pm	9am-3pm	9am-3pm	9am-3pm
Extended Day Care	$85/week	$50/week	$50/week	$60/week
Karate (all Steve Nugent)	$220/session	$215/session		
	9 Sessions	9 Sessions	n/a summer	n/a summer
Volleyball	$235/5 days	$180/5 days	$110/4 days	
	9am-4pm	9am-3pm	8am-12 noon	n/a summer
Girls BKB Clinic	$233/5 days	$130/5 days	$160/4 days	
	9am-4pm	9am-3pm	9am-3pm	n/a summer
Ice Skating	$85/8	$161/7 wks	At Hayden	No town owned rink
	plus membshp	no membshp fees		
Adult Zumba	$100/10 weeks	$80/8 weeks	n/a summer	$55/6 weeks

Notes: Comparison of Belmont's offerings to comparable programs in towns with Recreation Enterprise Funds. Additional programming is available in all towns.

Appendix V
Field Oversight in Comparable Towns

	Field Permits Issued By Recreation	Field Oversight	User Fees
Arlington	Town and School	Recreation	Yes
Bedford	Town and School	Recreation	Yes
Burlington	Town and School	Semi Annual Field Use Mtg	Non Res only
Lexington	Town and School	Recreation	Yes
Watertown	Town and School	Recreation	Non Res only
Wayland	Town and School	Field Use Master Plan	Yes
Wellesley	Town and School	Playing Fields Task Force	Yes
Westford	Town only	School and Town Separately	Yes
Winchester	Town and School	Field Management Cmte	Yes

Appendix VI
Private Donations to Belmont Town and School Fields and Facilities For Maintenance and Improvements 2007-2014

	2007	2008	2009	2010	2011	2012	2013	2014	Total 2007- 2014
Belmont Boosters	$6,750	$11,600	$0	$0	$0	$0	$0	$0	$18,350
Brendan Grant Found-Direct	$4,025	$12,618	$30,904	$7,929	$7,233	$5,202	$12,400		$80,311
BG Found-Other	$1,750	$1,750	$1,750	$1,750	$2,000	$2,000	$1,000		$12,000
BG Found-In Kind	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000	$5,000		$35,000
Belmont Soccer Assoc.	$23,400	$24,837	$147,000	$25,000	$23,125	$23,694	$105,321	$98,824	$471,201
Belmont Second Soccer		$120,000	$7,500	$10,500	$8,900	$8,465	$9,900	$261,980	$427,245
Belmont Lacrosse	$2,000	$2,900	$0	$0	$0	$0	$1,381	$5,115	$11,396
Belmont Baseball Assn	$14,100	$35,000		$12,200		$8,000	$25,000		$94,300
Belmont Youth Hockey					$10,000	$2,000			$12,000
Anonymous	$0		$3,600		$2,400	$2,500	$2,500		$11,000
Total	$57,025	$213,705	$195,754	$62,379	$58,658	$56,861	$162,502	$365,919	$1,172,803
Friends of Joey's Park							$350,000		$350,000

Does not include private donations used to upgrade locker facility.
Does not include renovation of Brendan Grant Memorial Field, 2002-2007, by Brendan Grant Foundation. Total cost: $868, 531.

Per Peter Castanino (2014) and updated by Jim Fitzgerald (March 2015). Includes some non-capital costs.