



April 14, 2015

To: Town Meeting Members,

As Town Moderator since 2008 I have made a concerted effort with others to improve our Town Meeting, balancing the importance of a full discussion of complex issues with the desire not to get bogged down in trivial details. We have definitely made considerable progress but I -- and many Town Meeting Members who have talked to me -- have become increasingly concerned by those occasions in which a few Members choose to ask a long series of questions, often in a manner more resembling a courtroom than a Town Meeting, many of which could be answered beforehand. Because it limits the time others may use to speak, this practice can be disrespectful to the vast majority of Town Meeting Members.

In order to enhance the quality and pace of Town Meeting discussions while providing an opportunity to hear as many Members as possible, I will be implementing the following changes at the upcoming Annual Town Meeting:

- Establish an informal five-minute limit on speeches by Town Meeting Members. This will allow more Members to speak and cut down on repetition by requiring speakers to focus their remarks.
- Limit each speaker to an initial question and one follow-up question to enable the meeting to move more smoothly. Materials are sent to Town Meeting Members in advance, giving them ample time to get most questions answered before coming to Town Meeting. Town Meeting Members with questions may email them before the meeting to: [selectmen@belmont-ma.gov](mailto:selectmen@belmont-ma.gov). The Town Administrator's office will forward the questions to the appropriate Town official for response.
- Honor the current rule requiring that all Member questions be asked through the Moderator, a common Massachusetts Town Meeting guideline. While I have reminded Members of this rule, I have sometimes refrained from strict enforcement. However, this procedure is important to ensure civil discourse. Henceforth, if Town Meeting Members have a question, I will request that they always address the question to me and I will direct it to the appropriate person.

Like you, I respect our democratic processes and work hard to make our Town Meeting as effective as possible. In implementing these changes, I am always open to making adjustments as needed.

Thank you for your understanding and your cooperation.

*Mike*

Michael J. Widmer  
Moderator



*Office of the Board of Selectmen  
Town of Belmont  
Massachusetts*

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**BOARD OF SELECTMEN**

MARK A. PAOLILLO, Chair  
SAMI S. BAGHDADY, Vice-Chair  
JAMES R. WILLIAMS, Selectman

**TOWN ADMINISTRATOR**

DAVID J. KALE

**ASSISTANT TOWN ADMINISTRATOR**

PHYLLIS L. MARSHALL

May 16, 2016

Dear Town Meeting Members:

Enclosed please find information for Segment B of the Warrant for the **Annual Town Meeting** scheduled for 7:00 p.m. on **Monday, June 6, 2016** at the Chenery Middle School Auditorium.

Should the business of the Annual Town Meeting not conclude on June 6th, the meeting will be continued to 7:00 p.m. on the following dates, as required:

- Monday, June 8, 13 at the Chenery Middle School Auditorium

Also enclosed, please find the Warrant for the **Special Town Meeting** on the "Citizens' Petition – Relating to the Installation of Interior Wireless Telecommunications Facilities" scheduled for 7:00 p.m. on **Wednesday, June 8, 2016** and the Warrant for the **Special Town Meeting** to "Accept Conveyance from the Commonwealth of MA for Recreation, Public Works, or Other Municipal Purposes Chapter 11 of the Acts of 2014" (former Incinerator Site) scheduled for 8:30 p.m. on **Wednesday, June 8, 2016** at the Chenery Middle School Auditorium.

In addition to the Special Town Meeting Articles, there is one remaining non-financial article which is Article 6 "Relating to the Construction of Oversized Dwelling Units in the Single Residence C Zoning Districts" scheduled for Segment B.

Please be reminded that the Warrant and any additional information can be found in the Town Meeting section of the Town Clerk's web page at [www.Belmont-ma.gov](http://www.Belmont-ma.gov).

The customary Warrant Discussion Night, co-sponsored by the League of Women Voters and the Warrant Committee is scheduled for May 24, 2016 at 7:00 pm at the Beech Street Center.

We look forward to a productive Annual Town Meeting, and thank you for your continued involvement and participation in our Town's legislative process.

Sincerely,

Mark A. Paolillo, Chair  
Sami S. Baghdady, Vice Chair  
James R. Williams, Selectmen

**You are invited to attend**  
**Warrant Briefing**

**Tuesday, May 24<sup>th</sup>, 2016**  
**at 7 PM**

**Beech Street Center**  
**266 Beech Street**

**Opportunity to ask questions about**  
**Financial/Budgetary Warrant Articles**  
**prior to**  
**June 6<sup>th</sup> Annual Town Meeting**

**Town Officials and Department Heads**  
**will be present to provide information**

**Michael Libenson**  
**Chair of the Warrant Committee will preside**

**Cosponsored by:**

**the Warrant Committee**  
**and the**

**LWW**

**Belmont League of Women Voters®**  
**Education Fund**



**MOTIONS**  
**2016 ANNUAL TOWN MEETING**  
**June 6, 2016**  
**Draft as of May 16, 2016**  
*(Subject to Change)*

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**PRELIMINARY MOTION**

**ORDER OF THE ARTICLES**

MOVED: That the Town Meeting hear the motions in the following order: *(Majority vote)*

1,6,8,18,15,9,16,17,10,12,11,19,13,14

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**ARTICLE 1:**

**REPORTS**

MOVED: That Article 1 be taken from the table.

MOVED: That Article 1 be laid on the table. *(Majority vote)*

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**ARTICLE 6:**

**RELATING TO THE CONSTRUCTION OF OVERSIZED DWELLING  
UNITS IN THE SINGLE RESIDENCE C ZONING DISTRICTS**

MOVED: That under Article 6, the reading of the proposed Amendment to the Zoning By-Law pertaining to Sections 1.4, "Definitions and Abbreviations", 1.5.4, "Nonconforming Single and Two-Family Residential Structures" and 4.2.2, "Linear Requirements for Residential Districts", be dispensed with, the same being set forth in full under Article 6 in the Warrant for this Meeting and having been distributed to each Town Meeting Member.

*(Majority vote)*

MOVED: That the Town vote to amend the Zoning By-Law pertaining to Sections 1.4, "Definitions and Abbreviations", 1.5.4, "Nonconforming Single and Two-Family Residential Structures" and 4.2.2, "Linear Requirements for Residential Districts", as set forth under Article 6 of the Warrant for this Town Meeting. *(Two-thirds vote)*

REPORTING: Planning Board and Warrant Committee

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**ARTICLE 8:**

**SALARIES OF ELECTED OFFICIALS**

MOVED: That there be paid to the elected officers of the Town as salaries for the fiscal year commencing July 1, 2015 the amount set forth opposite the name of each officer as listed below:

<b>Elected Officials of the Town</b>	<b>Salary</b>
Town Moderator	\$200
Chair of the Board of Selectmen	\$5,000
Selectmen (2)	\$4,500 (each)
Town Clerk	\$91,572



2016 Annual Town Meeting Motions – Segment B

Town Treasurer	\$99,444
Chair of the Board of Assessors	\$3,030
Assessors (2)	\$2,200 (each)

*(Majority vote)*

Reporting: The Warrant Committee will report on this article.

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**ARTICLE 9: ENTERPRISE FUNDS FOR WATER AND SEWER AND STORMWATER SERVICES**

**MOVED:** A) That **\$6,807,918** be appropriated from the account classified as “Water Enterprise Fund” pursuant to Chapter 44, Section 53F½ of the General Laws for water service; said sum to be expended under the direction of the Board of Selectmen and said appropriation to be funded by a transfer of **\$775,000** from Water Retained Earnings and **\$6,032,918** from Water Revenues. *(Majority)*

**MOVED:** B) That **\$9,175,087** be appropriated from the account classified as “Sewer and Stormwater Enterprise Fund” pursuant to Chapter 44, Section 53F½ of the General Laws for sewer and stormwater services; said sum to be expended under the direction of the Board of Selectmen and said appropriation to be funded by a transfer of **\$775,000** from Sewer Retained Earnings and **\$8,400,087** from Sewer and Stormwater Revenues. *(Majority vote)*

Reporting: The Warrant Committee and Capital Budget Committee will report on this article.

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**ARTICLE 10: FISCAL YEAR 2017 BUDGET APPROPRIATION**

**MOVED:** A) That under General Government, **\$4,510,412** be raised and appropriated.

**MOVED:** B) That under Employee Benefits, **\$6,958,000** be raised and appropriated for Retirement expenses.

**MOVED:** C) That under Employee Benefits, **\$2,852,142** be raised and appropriated for Other Reserves, including Health Insurance, Insurance and Salary Reserve.

**MOVED:** D) That under Public Safety **\$13,334,736** be raised and appropriated.

**MOVED:** E) That under Belmont Public Schools **\$50,126,583** be raised and appropriated.

**MOVED:** F) That under Minuteman Regional School **\$795,654** be raised and appropriated.

**MOVED:** G) That under Public Services **\$13,093,626** be raised and appropriated.

**MOVED:** H) That under Human Services, **\$3,182,797** be raised and appropriated.

**MOVED:** I) That under Debt and Interest on Debt **\$4,690,532** be raised and appropriated.

*(Majority vote)*

Reporting: The Warrant Committee will report on this article.

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**ARTICLE 11: TRANSFER FUNDS TO STABILIZATION FUND**

**MOVED:** That the Town raise and appropriate to the General Stabilization Fund the sum of **\$150,000**. *(Two-Thirds vote)*

Reporting: The Warrant Committee will report.

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**ARTICLE 12:**

**AUTHORIZATION TO TRANSFER BALANCES**

**MOVED:** That **\$4,416,042** be transferred from the following available funds to meet a portion of the FY2017 operating budget expenses in such sums as listed below:

- a) **\$235,000** from fund balance in Abatement and Exemption Surplus Account
- b) **\$650,000** from Belmont Municipal Light Department to offset the tax rate
- c) **\$1,705,000** from Unreserved Fund Balance (Free Cash)
- d) **\$144,000** from Parking Meters Receipts
- e) **\$166,000** from Water Revenue for indirect costs
- f) **\$133,000** from Sewer Revenue for indirect costs
- g) **\$125,000** from Capital Endowment Fund for various capital expenditures
- h) **\$153,657** from Capital Projects Fund for various capital expenditures
- i) **\$1,084,200** from Receipts Reserved
- j) **\$20,185** from Bond Premium Amortization

*(Majority vote)*

**MOVED:** That the entire revenue derived from the sale of electricity to private customers, municipal departments, including the cost of street lighting and from jobbing during the twelve months beginning **January 1, 2016**, be allocated and appropriated for the operating expenses of the Municipal Light Department including out-of-state travel, all said appropriations and payments to be expended under the direction of the Municipal Light Board and that the Town Accountant is hereby authorized to make such transfers on the books of the Town. *(Majority vote)*

Reporting: The Warrant Committee and Capital Budget Committee will report on this article.

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**ARTICLE 13:**

**AUTHORIZATION FOR "UP FRONT" FUNDS FOR  
CHAPTER 90 HIGHWAY IMPROVEMENTS**

**MOVED:** That the Town be authorized to construct, reconstruct, resurface or repair all or portions of various Town Ways and to authorize the expenditure of **\$535,089** as may be received from the Commonwealth of Massachusetts through the Massachusetts Department of Transportation for the fiscal year commencing July 1, 2016 and expended under the provisions of Chapter 90 of the Massachusetts General Laws. *(Majority vote)*

Reporting: The Warrant Committee and Capital Budget Committee will report on this article.

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**ARTICLE 14:**

**APPROPRIATION OF CAPITAL EXPENDITURES**

**MOVED:** A) That **\$2,631,343** be appropriated for the purchase of Public Safety Equipment, Site Improvements, Public Works Equipment, Equipment for Town Facilities, and consulting services in connection therewith, to construct public ways, and for Building and Facility and Public Works Construction; and for Major Maintenance and Alterations (including design work) as follows, said sum to be raised by general tax and expended under the direction of the Board of Selectmen. *(Majority vote)*

2016 Annual Town Meeting Motions – Segment B

**1. Capital Discretionary**

**FY17**

**DEPARTMENT OF PUBLIC WORKS**

Above Ground Mobile Lift	\$ 47,800
Sidewalk Maintenance	\$ 205,000
Sidewalk Management Program	\$ 50,000
Sidewalk Vacuum Sweeper	\$ 26,300

**Sub Total \$ 329,100**

**POLICE DEPARTMENT**

Zetron Station Alerting Software Conversion	\$ 61,750
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**Sub Total \$ 61,750**

**HEALTH**

Animal Control Van	\$ 43,544
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**Sub Total \$ 43,544**

**LIBRARY**

Boiler Replacement	\$ 80,000
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**Sub Total \$ 80,000**

**FIRE DEPARTMENT**

Turn Out Gear Replacement	\$ 25,000
Ambulance Replacement	\$ 166,000
Cardiac Monitor Replacement	\$ 7,000

**Sub Total \$ 198,000**

**FACILITIES DEPARTMENT**

Fire Stations Building Envelope Repairs	\$ 1,448,500
DPW Garage Ventilation Improvements	\$ 250,000
Town/School Security Upgrades Design	\$ 67,449
Winn Brook - Replace Boiler	\$ 55,000

**Sub Total \$ 1,820,949**

**SCHOOLS**

Town-wide Core Network Switching Equipment	\$ 60,000
Maple Terrance Sidewalk Installation	\$ 38,000

**Sub Total \$ 98,000**

**GRAND TOTAL \$ 2,631,343**

**MOVED:** B) That **\$1,601,700** be appropriated for road paving projects, said sum to be raised and expended under the direction of the Board of Selectmen. (*Majority vote*)

**MOVED:** C) That **\$125,000** be appropriated for the installation of a press box, lift, bracing for lift, excavation, and concrete at Harris Field Bleachers and to meet this appropriation the Treasurer, with the approval of the Board of Selectmen, said appropriation to be funded by a transfer of **\$125,000** from the Harris Field Complex available funds and to take any other action necessary and incidental thereto. (*Majority vote*)

**Reporting:** The Warrant Committee and Capital Budget Committee will report on each of the motions.

**ARTICLE 15: OTHER POST EMPLOYMENT BENEFITS (OPEB) STABILIZATION FUND**

**MOVED:** That the Town appropriate and transfer **\$316,530** from the General Fund Free Cash to the Other Post Employee Benefits (“OPEB”) Stabilization Fund for the purpose of funding Other Post Employment Benefits. In addition a total of \$27,152 transferred from Article 9 Water Enterprise Fund and Sewer Enterprise Fund and from Article 12 Light Enterprise Fund to the Other Post Employee Benefits (“OPEB”) Stabilization Fund, as follows:

Free Cash	92.1%	\$316,530
Light Enterprise Account	4.2%	\$ 14,435
Sewer Enterprise Account	1.7%	\$ 5,843
Water Enterprise Account	2.0%	\$ 6,874
<b>Total</b>	<b>100%</b>	<b>\$343,682</b>

*(Two-Thirds vote)*

Reporting: The Warrant Committee will report.

**ARTICLE 16: AUTHORIZATION FOR REVOLVING FUNDS**

**MOVED:** That the Town authorize or reauthorize revolving accounts for Fiscal Year 2017 pursuant to Chapter 44, Section 53E½ of the General Laws as printed in Article 16 of the Warrant for this Annual Town Meeting. *(Majority vote)*

Revolving Account	Spending Authority	Revenue Source	Allowed Expenses	Expenditure Limits
Teen/Youth Events	Recreation Commission	Event fees	Teen/youth center events	\$ 5,000
Senior Programs	Council on Aging	Course/Program fees	Program costs, trip expenses	\$150,000
Art Gallery	Belmont Cultural Council	Percentage of art sales	Gallery exhibit and event expenses	\$ 15,000
Restoration Maintenance of Rock Meadow	Conservation Commission	Rental fees: garden plots	Restoration, maintenance of conservation area	\$ 11,000
Copying/ Lost Books	Board of Library Trustees	Lost book fees; Printing/ copying fees	Replacement of lost books; copier, printer, supplies & maintenance	\$ 15,000
Stormwater Consulting	Community Development	Consultant fees collected from permit applicants	Consultant fees	\$ 50,000
Stormwater Improvements	Community Development	Consultant Fees and contributions collected from permit applicants	Consulting, design, construction, and maintenance of public or shared stormwater facilities	\$100,000
Martin Luther King Day Breakfast	Human Rights Commission	Ticket Sales	Event expenses	\$ 5,000

Reporting: The Warrant Committee will report on this article.

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**ARTICLE 17: UNDERWOOD POOL PROJECT BORROWING DE-AUTHORIZATION AND APPROPRIATION OF BOND PREMIUM PROCEEDS**

**MOVED:** That the Town vote to rescind the unused borrowing authority in the amount of **\$112,000** that was appropriated under Article 17 of the May 7, 2014 Annual Town Meeting for the purpose of performing improvements to the Underwood Pool Project; and appropriate the premium paid to the Town upon the sale of bonds issued for the Underwood Pool Project, which are subject of a Proposition 2 1/2 debt exclusion, to pay costs of the project financed by such bonds and to reduce the amount authorized to be borrowed by the same amount. (*Majority vote*)

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

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**ARTICLE 18: CITIZENS' PETITION: OTHER POST EMPLOYMENT BENEFIT STABILIZATION FUND**

**MOVED:** That the Town appropriate the sum of **\$750,000** to the other Post Employee Benefits (OPEB") Stabilization Fund for the purpose of funding Other Post Employment Benefits and that the money shall be provided by the transfer from available funds (free cash), by transfer from the departmental Enterprise Funds as follows:

Free Cash -	92.1%-	\$690,750
Light Enterprise Account -	4.2% -	\$ 31,500
Sewer Enterprise Account -	1.7% -	\$ 12,750
Water Enterprise Account -	2.0% -	\$ 15,000
<b>Total</b>		<b>\$750,000</b>

(*Two-Thirds vote*)

**MOVED:** That article 18 be dismissed. (*Majority vote*)

Submitted by James R. Williams

The Warrant Committee will report on this Article.

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**ARTICLE 19: CITIZENS' PETITION: GENERAL STABILIZATION FUND**

**MOVED:** That the Town vote to transfer \$1,100,000 from unreserved fund balance (free cash) to the General Stabilization Fund. (*Two-Thirds vote*)

Submitted by Robert L. Sarno

The Warrant Committee will report on this Article.

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**VOTES TO CONTINUE THE ANNUAL TOWN MEETING**

**MOVED:** That the Annual Town Meeting be recessed and continued to 7:00pm on **Wednesday, June 8, 2016** at the Chenery Middle School.

**CLOSING MOTIONS**

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**FINAL MOTION TO DISSOLVE THE TOWN MEETING:**

**MOVED:** That the 2016 Annual Town Meeting be dissolved.



**TOWN OF BELMONT**  
OFFICE OF THE BOARD OF SELECTMEN  
455 CONCORD AVENUE  
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**BOARD OF SELECTMEN**

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**TOWN ADMINISTRATOR**

DAVID J. KALE

**ASSISTANT TOWN ADMINISTRATOR**

PHYLLIS L. MARSHALL

**TO:** Town Meeting Members

**FROM:** Mark A. Paolillo, Chair of the Board of Selectmen  
Michael Libenson, Chair of the Warrant Committee

**DATE:** May 11, 2016

**SUBJECT:** FY17 Budget

Attached please find the FY17 Budget Summary, which has been approved by the Board of Selectmen and recommended by the Warrant Committee.

The full FY17 Budget Detail is available on the Town's website' [www.belmont-ma.gov](http://www.belmont-ma.gov). Through the conclusion of the Annual Town Meeting there will be a link on the homepage's rotating banner that can take residents directly to the Warrant Report. Documents may also be located directly by visiting the Town Administration Department page and clicking the link labeled "Budget Information" on the left-hand side.

Questions about the FY17 Budget maybe directed to the Warrant Committee by emailing [warrcommpublic@belmont-ma.gov](mailto:warrcommpublic@belmont-ma.gov).

**TOWN OF BELMONT  
FY17 REVENUE**

DESCRIPTION	FY15 ACTUALS	FY16 RECAP REVENUES	FY17 REVENUES
<b>A. REAL &amp; PERSONAL PROPERTY TAXES</b>			
REAL & PERSONAL PROPERTY TAXES	\$75,877,910	\$81,201,433	\$79,095,918
ALLOWABLE 2 1/2% INCREASE	\$0	\$0	\$1,981,148
NEW GROWTH	\$0	\$0	\$720,000
DEBT EXCLUSION	\$0	\$0	\$3,659,118
<b>TOTAL</b>	<u>\$75,877,910</u>	<u>\$81,201,433</u>	<u>\$85,456,184</u>
<b>A. REAL &amp; PERSONAL PROPERTY TAXES TOTAL</b>	<u>\$75,877,910</u>	<u>\$81,201,433</u>	<u>\$85,456,184</u>



**TOWN OF BELMONT  
FY17 REVENUE**

DESCRIPTION	FY15 ACTUALS	FY16 RECAP REVENUES	FY17 REVENUES
<b>B. TOTAL LOCAL RECEIPTS</b>			
MV EXCISE AND MEALS TAX	\$3,259,624	\$3,008,515	\$3,145,201
OTHER EXCISE (MEALS)	\$207,523	\$205,000	\$210,000
PENALTIES AND INTEREST	\$427,130	\$220,000	\$220,000
PAYMENT IN LIEU OF TAXES	\$37,457	\$36,000	\$36,000
<b>OTHER TAXES TOTAL</b>	<b>\$3,931,734</b>	<b>\$3,469,515</b>	<b>\$3,611,201</b>
AMBULANCE RECEIPTS	\$871,456	\$804,750	\$822,000
<b>OTHER CHARGES FOR SERVICES TOTAL</b>	<b>\$871,456</b>	<b>\$804,750</b>	<b>\$822,000</b>
FEES - TOWN CLERK	\$328	\$300	\$46,200
FEES - TREASURER	\$19,571	\$15,000	\$15,000
FEES-PARKING MARKING	\$27,330	\$29,130	\$29,130
DEPUTY FEES - CLEARING	\$23	\$1,338	\$1,338
FEES - APPEALS BOARD	\$5,850	\$6,650	\$6,650
ALARM FEES POLICE FEES	\$22,695	\$18,810	\$20,810
FEES-POLICE	\$2,640	\$2,774	\$2,774
FIRE MASTER BOX	\$16,750	\$17,725	\$17,725
FEES - FIRE	\$112,825	\$55,273	\$55,273
<b>FEES TOTAL</b>	<b>\$208,012</b>	<b>\$147,000</b>	<b>\$194,900</b>

**TOWN OF BELMONT  
FY17 REVENUE**

DESCRIPTION	FY15 ACTUALS	FY16 RECAP REVENUES	FY17 REVENUES
RENTALS COA	\$23,423	\$15,000	\$15,000
OTHER LIBRARY	\$33,122	\$15,000	\$15,000
OTHER CEMETERY	\$120,677	\$120,000	\$120,000
OTHER RECREATION-PROGRAMS	\$627,023	\$725,000	\$735,000
OTHER SELECTMEN	\$66,490	\$46,751	\$46,750
OTHER TREASURER	\$744	\$0	\$0
OTHER ASSESSORS	\$175	\$250	\$250
OTHER TOWN CLERK	\$46,780	\$44,000	\$0
OTHER POLICE (PD ADMIN. FEE)	\$33,374	\$31,546	\$31,545
OTHER HIGHWAY - DISPOSAL FEES	\$0	\$0	\$0
OTHER HIGHWAY/RECYCLABLE	\$31,882	\$28,245	\$28,245
OTHER HEALTH	\$54,123	\$45,000	\$50,000
BUILDINGS DEPARTMENTAL	\$4,386	\$7,500	\$7,500
OTHER CONSERVATION COMMISSION (CDD)	\$0	\$0	\$0
OTHER MISCELLANEOUS	\$87,938	\$0	\$0
<b>OTHER DEPARTMENTAL REVENUES TOTAL</b>	<b>\$1,130,137</b>	<b>\$1,078,292</b>	<b>\$1,049,290</b>
LICENSES - SELECTMEN (LIQUOR)	\$56,836	\$45,000	\$45,000
LICENSES - TOWN CLERK	\$53,330	\$48,000	\$46,100
STREET OPENING PERMITS	\$39,300	\$30,000	\$30,000
LICENSES - POLICE	\$109,553	\$110,000	\$110,000
LICENSES/PERMITS - BUILDING	\$1,687,917	\$800,000	\$835,000
<b>LICENSES AND PERMITS TOTAL</b>	<b>\$1,946,936</b>	<b>\$1,033,000</b>	<b>\$1,066,100</b>

**TOWN OF BELMONT  
FY17 REVENUE**

DESCRIPTION	FY15 ACTUALS	FY16 RECAP REVENUES	FY17 REVENUES
COURT FINES	\$8,119	\$5,735	\$5,735
VIOLATION FINES POLICE	\$37,055	\$26,265	\$26,265
FALSE ALARM FINES - POLICE	\$6,165	\$3,000	\$3,000
PARKING FINES	\$154,515	\$150,000	\$160,000
<b>FINES AND FORFEITS TOTAL</b>	<b>\$205,854</b>	<b>\$185,000</b>	<b>\$195,000</b>
TOTAL INTEREST	\$264,531	\$150,000	\$160,000
<b>EARNINGS ON INVESTMENTS TOTAL</b>	<b>\$264,531</b>	<b>\$150,000</b>	<b>\$160,000</b>
<b>B. TOTAL LOCAL RECEIPTS TOTAL</b>	<b>\$8,558,660</b>	<b>\$6,867,557</b>	<b>\$7,098,491</b>
<b>C. OTHER AVAILABLE FUNDS</b>			
RECEIPTS RESERVED APPROP-PARKING METERS	\$60,000	\$90,000	\$144,000
UNRESERVED FUND BALANCE (Free Cash)	\$1,880,000	\$1,750,000	\$1,705,000
TRANS BOND PREMIUM AMORTIZATION	\$0	\$21,485	\$20,185
FUND BALANCE ABATEMENT & EXEMPT/OVERLAY	\$235,000	\$235,000	\$235,000
TRANS FROM LIGHT DEPT FOR TAX REDUCTION (PILOT)	\$650,000	\$650,000	\$650,000
TRANS FROM WATER FOR OPER COSTS	\$160,250	\$163,000	\$166,000
TRANS FROM SEWER FOR OPER COSTS	\$126,875	\$130,000	\$133,000
TRANS FROM LEFTOVER CAPITAL ITEMS	\$214,000	\$154,325	\$153,657
CAPITAL ENDOWMENT FUND SPEC PROJ	\$100,000	\$125,000	\$125,000
TRANS FROM RECEIPTS RESERVED	\$0	\$0	\$1,084,200
<b>TOTAL</b>	<b>\$3,426,125</b>	<b>\$3,318,810</b>	<b>\$4,416,042</b>
<b>C. OTHER AVAILABLE FUNDS TOTAL</b>	<b>\$3,426,125</b>	<b>\$3,318,810</b>	<b>\$4,416,042</b>

**TOWN OF BELMONT  
FY17 REVENUE**

DESCRIPTION	FY15 ACTUALS	FY16 RECAP REVENUES	FY17 REVENUES
<b>D. STATE AID</b>			
SCHOOL AID CHAPTER 70	\$6,420,105	\$6,766,099	\$7,096,024
SCH CONSTR-STATE AID	\$382,498	\$0	\$0
CHARTER SCHOOL REIMB	\$1,786	\$2,956	\$4,816
GENERAL MUNICIPAL AID	\$2,009,147	\$2,081,476	\$2,170,979
VETERANS' BENEFITS	\$18,929	\$17,646	\$45,066
LOSS OF TAXES VETERANS, BLIND, SURV SPOUSE	\$74,828	\$47,879	\$44,018
<b>TOTAL</b>	<b>\$8,907,293</b>	<b>\$8,916,056</b>	<b>\$9,360,903</b>
<b>D. STATE AID TOTAL</b>	<b>\$8,907,293</b>	<b>\$8,916,056</b>	<b>\$9,360,903</b>
<b>GRAND TOTAL</b>	<b>\$96,769,988</b>	<b>\$100,303,856</b>	<b>\$106,331,620</b>

# Town of Belmont

## Department Summary Report

		FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
<b>0100</b>	<b>General Fund</b>					
	Legislative	\$10,622	\$18,518	\$18,518	\$18,518	\$19,228
	Selectmen	\$36,547	\$142,623	\$142,623	\$142,623	\$126,338
	Town Administrator	\$519,615	\$553,706	\$555,656	\$555,656	\$585,036
	Reserve Fund	\$0	\$400,000	\$400,000	\$0	\$400,000
	Town Accountant/Auditor	\$395,009	\$406,799	\$408,203	\$406,799	\$407,570
	Assessors	\$338,520	\$408,577	\$413,908	\$408,577	\$388,145
	Treasurer/Collector	\$553,015	\$592,119	\$604,565	\$604,565	\$638,335
	Parking Clerk	\$53,650	\$43,044	\$43,044	\$43,044	\$43,044
	Legal	\$258,534	\$297,500	\$297,500	\$297,500	\$297,500
	Human Resources	\$246,886	\$283,826	\$284,922	\$271,282	\$292,784
	Information Technology	\$874,138	\$902,474	\$904,424	\$897,923	\$874,071
	Town Clerk	\$186,751	\$188,092	\$191,110	\$191,110	\$200,216
	Elections & Registration	\$172,911	\$189,787	\$190,178	\$190,177	\$230,645
	VFW & Amer Legion	\$7,500	\$7,500	\$7,500	\$7,500	\$7,500
	<b>Total General Government</b>	<b>\$3,653,699</b>	<b>\$4,434,563</b>	<b>\$4,462,149</b>	<b>\$4,035,274</b>	<b>\$4,510,412</b>

# Town of Belmont

## Department Summary Report

	FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
Retirement and Pension Contrib	\$6,023,545	\$6,502,635	\$6,502,635	\$6,502,635	\$6,958,000
Worker's Compensation	\$104,767	\$112,050	\$112,050	\$112,050	\$123,152
Unemployment Compensation	\$26,509	\$40,000	\$40,000	\$40,000	\$40,000
Health Insurance and Salary Reserves	\$1,614,247	\$2,170,620	\$2,076,408	\$1,249,722	\$2,221,422
Life Insurance	\$14,760	\$19,425	\$19,425	\$19,425	\$19,425
Medicare	(\$65,819)	\$6,500	\$6,500	\$6,500	\$6,500
Liability Insurance	\$363,210	\$428,780	\$428,780	\$428,780	\$441,643
<b>Total Insurance and Benefits</b>	<b>\$8,081,219</b>	<b>\$9,280,010</b>	<b>\$9,185,798</b>	<b>\$8,359,112</b>	<b>\$9,810,142</b>
Police Administration	\$449,737	\$462,880	\$465,896	\$465,896	\$511,792
Police Records	\$87,972	\$87,577	\$90,683	\$90,683	\$93,644
Police Patrol	\$3,895,905	\$3,988,776	\$3,988,776	\$3,985,455	\$4,223,641
Police Traffic Control (Not Sc	\$487,822	\$565,382	\$568,420	\$568,420	\$597,802
Police Detectives	\$462,927	\$553,507	\$553,507	\$553,508	\$460,175
Police Community Service	\$348,634	\$369,470	\$369,860	\$369,859	\$374,334
Fire Administration	\$635,104	\$640,373	\$643,574	\$642,170	\$779,414
Fire Suppression	\$4,922,960	\$5,002,367	\$5,002,367	\$5,002,369	\$5,114,851
Emergency Medical Services	\$158,213	\$182,200	\$182,200	\$182,200	\$197,300
Emergency Management (BEMA)	\$21,826	\$24,341	\$24,341	\$24,341	\$24,341
Public Safety Comm (911)	\$896,211	\$940,413	\$941,193	\$941,193	\$957,442
<b>Total Public Safety</b>	<b>\$12,367,311</b>	<b>\$12,817,287</b>	<b>\$12,830,818</b>	<b>\$12,826,094</b>	<b>\$13,334,736</b>

# Town of Belmont

## Department Summary Report

	FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
Education	\$46,688,475	\$49,660,070	\$49,660,070	\$49,660,070	\$50,126,583
Education - Minuteman	\$751,046	\$831,525	\$831,525	\$831,525	\$795,654
<b>Total Public Schools</b>	<b>\$47,439,521</b>	<b>\$50,491,595</b>	<b>\$50,491,595</b>	<b>\$50,491,595</b>	<b>\$50,922,237</b>

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# Town of Belmont

## Department Summary Report

	FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
Community Development-Planning	\$171,436	\$183,431	\$185,682	\$172,654	\$257,927
Community Development-Admin	\$361,599	\$360,376	\$363,451	\$363,451	\$372,317
Building Inspection	\$287,269	\$291,472	\$297,897	\$297,897	\$295,361
Engineering Services	\$105,201	\$115,659	\$118,263	\$117,932	\$129,688
Public Works Administration	\$343,710	\$324,567	\$327,166	\$320,386	\$334,541
Street Maintenance	\$647,248	\$688,026	\$697,120	\$686,602	\$719,543
Snow and Ice Removal	\$1,352,699	\$678,095	\$673,095	\$673,095	\$733,135
Street Lighting	\$304,123	\$331,900	\$331,900	\$331,900	\$348,495
Central Fleet Maint HWY Fac	\$570,072	\$581,901	\$584,906	\$571,663	\$590,205
Forestry	\$317,916	\$285,102	\$285,102	\$285,101	\$288,711
Collection and Disposal	\$2,316,267	\$2,439,265	\$2,439,450	\$2,438,445	\$2,610,016
Cemetery	\$473,910	\$474,922	\$475,118	\$464,185	\$502,791
Recreation Administration	\$73,951	\$75,333	\$77,813	\$77,888	\$80,236
Recreation Programs	\$742,077	\$800,190	\$802,472	\$787,324	\$818,846
Parks	\$557,844	\$599,233	\$599,428	\$598,568	\$612,776
Deltas	\$62,437	\$64,179	\$64,179	\$64,054	\$75,522
Facility Department/Systemwide	\$424,850	\$444,027	\$446,772	\$444,028	\$936,920
Facility Department/Town	\$1,112,717	\$1,158,551	\$1,158,551	\$1,158,551	\$908,158
Facility Department/School-NonSalary	\$0	\$0	\$0	\$0	\$2,478,438
<b>Total Public Services</b>	<b>\$10,225,327</b>	<b>\$9,896,230</b>	<b>\$9,928,365</b>	<b>\$9,853,724</b>	<b>\$13,093,626</b>



# Town of Belmont

## Department Summary Report

	FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
Animal Care and Control	\$62,240	\$64,583	\$64,973	\$65,273	\$67,554
Health Department	\$338,612	\$378,456	\$381,567	\$382,019	\$392,674
Council on Aging	\$365,263	\$394,457	\$398,872	\$398,871	\$410,420
Veterans' Services	\$72,885	\$120,234	\$120,380	\$113,380	\$119,565
Library Administration	\$287,485	\$189,435	\$192,062	\$191,137	\$197,852
Library Public Services	\$1,241,668	\$1,328,015	\$1,335,285	\$1,335,284	\$1,383,559
LibraryTech Services	\$304,725	\$294,769	\$297,875	\$297,874	\$303,298
Library Plant Operations	\$197,688	\$302,245	\$302,245	\$302,245	\$307,875
<b>Total Human Services</b>	<b>\$2,870,566</b>	<b>\$3,072,194</b>	<b>\$3,093,258</b>	<b>\$3,086,083</b>	<b>\$3,182,797</b>
Retirement of Debt	\$3,448,191	\$2,680,471	\$2,733,532	\$2,733,532	\$3,072,919
Interest on Long-term Debt	\$1,600,918	\$1,667,948	\$1,592,961	\$1,592,961	\$1,565,113
Interest on Short-term Debt	\$0	\$2,500	\$2,500	\$2,500	\$2,500
Int on Short term Debt Exclus	\$0	\$50,000	\$71,926	\$50,000	\$50,000
<b>Total Debt &amp; Interest</b>	<b>\$5,049,109</b>	<b>\$4,400,919</b>	<b>\$4,400,919</b>	<b>\$4,378,993</b>	<b>\$4,690,532</b>
Abatements & Exemptions Allowance	\$813,236	\$800,000	\$805,773	\$805,773	\$800,000
<b>Total Overlay</b>	<b>\$813,236</b>	<b>\$800,000</b>	<b>\$805,773</b>	<b>\$805,773</b>	<b>\$800,000</b>
State Assessments and Charges	\$1,713,081	\$1,733,129	\$1,737,816	\$1,737,816	\$1,754,095
<b>Total State Charges</b>	<b>\$1,713,081</b>	<b>\$1,733,129</b>	<b>\$1,737,816</b>	<b>\$1,737,816</b>	<b>\$1,754,095</b>
<b>Total General Fund</b>	<b>\$92,213,069</b>	<b>\$96,925,927</b>	<b>\$96,936,491</b>	<b>\$95,574,465</b>	<b>\$102,098,577</b>

# Town of Belmont

## Department Summary Report

		FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
<b>3000</b>	<b>Pavement Management</b>					
	Capital Proj - Roads Non Discretionary	\$1,284,000	\$1,549,000	\$1,549,000	\$1,549,000	\$1,601,700
	<b>Total Capital Budget</b>	<b>\$1,284,000</b>	<b>\$1,549,000</b>	<b>\$1,549,000</b>	<b>\$1,549,000</b>	<b>\$1,601,700</b>
	<b>Total Pavement Management</b>	<b>\$1,284,000</b>	<b>\$1,549,000</b>	<b>\$1,549,000</b>	<b>\$1,549,000</b>	<b>\$1,601,700</b>

# Town of Belmont

## Department Summary Report

		FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
<b>3100</b>	<b>Town Misc Capital Projects</b>					
	Capital Proj - Discretionary	\$1,394,500	\$1,818,365	\$1,818,365	\$1,818,365	\$2,631,343
	<b>Total Capital Budget</b>	<b>\$1,394,500</b>	<b>\$1,818,365</b>	<b>\$1,818,365</b>	<b>\$1,818,365</b>	<b>\$2,631,343</b>
	<b>Total Town Misc Capital Projects</b>	<b>\$1,394,500</b>	<b>\$1,818,365</b>	<b>\$1,818,365</b>	<b>\$1,818,365</b>	<b>\$2,631,343</b>

# Town of Belmont

## Department Summary Report

	FY15 EXPENDED	FY16 TOWN FINAL VOTE	FY16 ADJUSTED BUDGET	FY16 TOWN EST EXP	FY17 TOWN FINAL VOTE
<b>Grand Totals</b>	<u>\$94,891,569</u>	<u>\$100,293,292</u>	<u>\$100,303,856</u>	<u>\$98,941,830</u>	<u>\$106,331,620</u>

<b>PERSONAL SERVICES</b>	\$65,109,186	\$69,469,737	\$69,464,067	\$68,556,149	\$72,312,075
<b>OTHER EXPENSES</b>	\$21,342,864	\$22,364,565	\$22,380,800	\$21,949,218	\$24,234,214
<b>CAPITAL OUTLAY</b>	\$8,439,518	\$8,458,989	\$8,458,989	\$8,436,463	\$9,785,331
	<u>\$94,891,569</u>	<u>\$100,293,292</u>	<u>\$100,303,856</u>	<u>\$98,941,830</u>	<u>\$106,331,620</u>

**Town of Belmont  
WATER ENTERPRISE EXPENDITURES**

Org & Object #	Account Title	FY15	FY16	FY16 EST	FY17 PROPOSED
		ACTUAL	BUDGET	EXPENSES	BUDGET
<b><u>6504501</u></b>	<b>WATER ADMINISTRATION</b>				
511000	FULL TIME WAGES	143,804	146,409	151,409	155,581
511001	PAID PERSONAL DAYS	-	705	-	720
514800	LONGEVITY	525	525	650	725
517000	HEALTH INSURANCE	16,285	16,285	16,285	16,285
517200	WORKERS COMP.	-	770	770	795
517800	MEDICARE	2,091	2,140	2,140	2,266
517100	HEALTH INSURANCE - RETIREMENT	83,929	-	-	-
518000	RETIREMENT	35,376	35,376	35,376	37,843
	<b><u>PERSONAL SERVICES</u></b>	<b><u>282,010</u></b>	<b><u>202,210</u></b>	<b><u>206,630</u></b>	<b><u>214,215</u></b>
<b><u>6504502</u></b>					
522800	Natural GAS	10,964	10,500	10,500	11,025
522900	ELECTRICITY	8,587	7,475	7,475	7,850
524300	MAINTENANCE BUILDING	16,520	8,000	8,000	8,000
524301	MAINT.GROUNDS	457	1,640	1,640	1,640
524500	MAINT. OFFICE EQUIP.	-	1,030	1,030	1,030
524502	MUNIS - TYLER TECH	11,758	13,415	13,415	19,080
530000	PROFESSIONAL SERVICES	4,225	4,120	4,120	4,120
530700	LABORATORY SERVICES	128	500	500	500
530800	METER READING/BILLING SERVICE	59,247	80,000	85,000	97,500
531000	LOCK BOX SERVICE	100	8,000	8,000	8,000
531900	ADVERTISING	188	500	500	500
534100	TELEPHONE	2,690	2,774	2,774	2,910
534500	POSTAGE	-	500	500	500
534700	PRINTING	105	500	500	500
538500	WATER RESERVE	6,171	96,800	96,800	96,800
542100	OFFICE SUPPLIES	2,990	2,895	2,895	2,895
542200	COMPUTER SUPPLIES	1,500	1,500	1,500	1,500
545000	CUSTODIAL SUPPLIES	365	685	685	685
552900	BOOKS & PERIODICALS	-	400	200	200
558900	MEDICAL REPORTS	500	250	250	300
569500	SAFE DRINKING WATER ASSESSMENT	6,836	8,000	8,000	8,000
571000	IN STATE TRAVEL REIMBURSEMENT	-	2,400	2,400	2,400
573000	ASSOC. DUES/CONFER.	4,428	3,150	3,150	3,150
573400	STREET OPENING PERMITS	5,200	5,000	5,000	5,000
	<b><u>TOTAL OTHER EXPENSE</u></b>	<b><u>142,959</u></b>	<b><u>260,034</u></b>	<b><u>264,834</u></b>	<b><u>284,085</u></b>
<b><u>6504</u></b>					
596100	TOWN SUPPORT SERVICES	160,250	163,000	163,000	166,000
596100	OPEB TRUST FUND	5,827	8,068	8,068	8,068
587000	OFFICE EQUIPMENT/COMPUTERS	-			
585200	BILLING SOFTWARE UPGRADE NISC	16,850	91,850	91,850	20,000
	<b><u>CAPITAL OUTLAY</u></b>	<b><u>182,927</u></b>	<b><u>262,918</u></b>	<b><u>262,918</u></b>	<b><u>194,068</u></b>
	<b>TOTAL WATER ADMIN.</b>	<b>607,896</b>	<b>725,162</b>	<b>734,382</b>	<b>692,368</b>

**Town of Belmont  
WATER ENTERPRISE EXPENDITURES**

Org & Object #	Account Title	FY15	FY16	FY16 EST	FY17 PROPOSED
		ACTUAL	BUDGET	EXPENSES	BUDGET
<b><u>6504511</u></b>	<b>WATER DISTRIB/MAINT SERVICES</b>				
511000	FULL TIME WAGES	541,178	582,267	572,267	592,360
511100	PART TIME SALARY	15,472	15,150	15,150	15,150
513000	OVERTIME	123,437	153,729	148,729	156,800
514000	ON CALL	35,253	54,563	54,563	55,655
514400	MEAL ALLOWANCE	210	300	300	300
514800	LONGEVITY	3,725	3,825	3,550	3,775
515200	AVAILABILITY STIPEND	6,344	6,760	6,760	6,760
515500	CDL STIPEND	10,400	10,400	10,400	10,479
517000	HEALTH INSURANCE	115,740	119,020	119,020	105,465
517101	RETIREMENT - HEALTH	-	76,900	76,900	81,497
517200	WORKERS COMP	-	20,060	20,060	20,665
517800	MEDICARE	8,830	9,082	9,082	9,228
517900	LIFE INSURANCE	-			
518000	RETIREMENT	213,568	171,905	171,905	183,979
519001	OUT OF GRADE	1,415	3,000	2,000	2,000
519900	CLOTHING ALLOWANCE	7,910	7,910	7,910	7,910
	<b><u>PERSONAL SERVICES</u></b>	<b><u>1,083,482</u></b>	<b><u>1,234,871</u></b>	<b><u>1,218,596</u></b>	<b><u>1,252,023</u></b>
<b><u>6504512</u></b>					
524100	BACKFLOW PREV/CROSS CONN PROG	-	2,000	2,000	2,000
524400	REPAIR & MAINT - VEHICLES	12,829	13,700	13,700	13,700
524500	MAINT EQUIP OTHER	660	1,200	1,200	1,200
529700	SOIL REMOVAL	-	16,000	11,000	11,000
530007	MWRA LEAK DETECTION	13,775	15,152	15,152	15,155
530100	LEGAL SERVICES	2,300			
530900	CONTRACT PATCHING	89,857	84,000	84,000	84,000
531600	POLICE DETAIL	3,515	3,060	3,060	2,000
531700	EMPLOYEE TRAINING	473	3,000	3,000	3,000
534800	GIS MAINTENANCE	10,782	30,000	30,000	30,000
548900	UNLEADED GAS	5,391	5,300	5,300	5,300
548901	DIESEL FUEL	13,867	13,000	13,000	13,000
549000	MEDICAL SUPP	-	400	400	400
553100	PUBLIC WORKS SUPP WATER	33,207	33,275	33,275	33,275
553400	SIDEWALK REPAIR	1,290	2,000	2,000	2,000
553500	WATER METERS	120,000	147,000	147,000	147,000
553600	WATER REPAIR SUPPLIES	72,535	80,575	80,575	80,575
569400	MWRA ASSESSMENT	2,582,348	2,674,576	2,674,576	2,839,601
573100	LICENSE ETC	315	500	500	500
576000	CLAIM SETTLEMENT	5,695			
591003	MWRA BOND REPAYMENT	197,757	698,475	698,475	719,821
	<b><u>TOTAL OTHER EXPENSES</u></b>	<b><u>3,166,596</u></b>	<b><u>3,823,213</u></b>	<b><u>3,818,213</u></b>	<b><u>4,003,527</u></b>

**Town of Belmont  
WATER ENTERPRISE EXPENDITURES**

Org & Object #	Account Title	Fiscal Year 2017			
		FY15 ACTUAL	FY16 BUDGET	FY16 EST EXPENSES	FY17 PROPOSED BUDGET
<b><u>6504513</u></b>					
587000	COMMUNICATION EQUIPMENT	-			
587000	OFFICE EQUIPMENT	-			
587001	MWRA-METER MODERNIZATION				
<b><u>65550723</u></b>					
589500	WATER MAIN REPLACEMENT	250,000	503,000	503,000	250,000
589500	Phase I of Smart Meter Program			-	500,000
<b><u>65550</u></b>					
543000	BUILDING PROJECTS	-			
<b><u>65550713</u></b>					
589500	MWRA BOND FOR WATER MAIN REPL	-			
591004	MUNICIPAL BOND REPAYMENT	-			
<b><u>65550753</u></b>					
589500	GIS HARDWARE/SOFTWARE	-			
<b><u>65550743</u></b>					
589500	VEHICLE REPLACEMENT	79,000	-	-	110,000
	<b><u>CAPITAL OUTLAY</u></b>	<b><u>329,000</u></b>	<b><u>503,000</u></b>	<b><u>503,000</u></b>	<b><u>860,000</u></b>
	<b>TOTAL WATER DIST/MAINT</b>	<b>4,579,078</b>	<b>5,561,084</b>	<b>5,539,809</b>	<b>6,115,550</b>
	<b><u>TOTAL WATER SERVICES</u></b>	<b><u>5,186,974</u></b>	<b><u>6,286,246</u></b>	<b><u>6,274,191</u></b>	<b><u>6,807,918</u></b>
	<b><u>WATER SUMMARY</u></b>				
	WATER ADMINISTRATION	607,896	725,162	734,382	692,368
	MWRA WATER ASSESSMENT	2,582,348	2,674,576	2,674,576	2,839,601
	WATER DISTR/MAINT	1,996,730	2,886,508	2,865,233	3,275,949
	<b><u>TOTAL WATER ENTERPRISE</u></b>	<b><u>5,186,974</u></b>	<b><u>6,286,246</u></b>	<b><u>6,274,191</u></b>	<b><u>6,807,918</u></b>
	Total Revenue to be raised	5,186,974	5,758,246	5,746,191	6,032,918
	Planned use of Retained earnings to stabilize the rates		275,000	275,000	275,000
	Phase I of Smart Meter Program FY17		253,000	253,000	500,000
	Total Revenues	5,186,974	6,286,246	6,274,191	6,807,918

FY17 Budgets are estimates and further final information expected for MWRA assessments and capital as well as Retained Earnings use.

**Town of Belmont**  
**SEWER ENTERPRISE EXPENDITURES**  
**Fiscal Year 2017**

<b>Org &amp; Object #</b>	<b>Account Title</b>	<b>FY15 ACTUAL</b>	<b>FY16 BUDGET</b>	<b>FY16 EST EXPENSES</b>	<b>FY17 PROPOSED BUDGET</b>
<b>6604401</b>	<b>SANITARY SEWER MAINT (R)</b>				
511000	FULL TIME WAGE	403,019	423,857	413,857	435,228
513000	OVERTIME	64,522	71,819	71,819	73,255
514000	ON CALL	11,350	14,158	14,158	14,440
514001	PAID PERSONAL DAYS	852	1,200	853	1,225
514400	MEAL ALLOWANCE	10	200	200	200
514800	LONGEVITY	2,621	2,400	3,150	2,450
515500	CDL STIPEND	7,540	10,400	10,400	10,479
517000	HEALTH INSURANCE	113,995	103,720	103,720	103,720
517101	RETIREMENT - HEALTH INS.	43,091	58,013	58,013	48,484
517200	WORKERS COMP.	21,723	22,375	22,375	23,050
517800	MEDICARE	7,594	6,427	6,427	6,593
517900	LIFE INSURANCE	-	200	200	200
518000	RETIREMENT	331,556	354,670	354,670	379,497
519001	WORKING OUT OF GRADE	1,739	1,200	1,400	1,400
519900	CLOTHING ALLOWANCE	6,597	6,560	4,100	6,560
	<b>PERSONAL SERVICES</b>	<b>1,016,209</b>	<b>1,077,199</b>	<b>1,065,342</b>	<b>1,106,781</b>
<b>6604402</b>					
522900	ELECTRICITY	3,640	5,785	5,785	6,075
524200	REPAIR & MAINT S.S.				
524502	MUNIS-TYLER TECH	11,758	13,415	13,415	19,080
527300	RENTAL EQUIP.	39,255	40,435	40,435	41,245
	SOIL REMOVAL	-	10,000	-	10,000
530000	PROF SERVICES	-	4,120	4,120	4,245
530800	METER READING/BILLING SERVIC	59,247	80,000	85,000	97,500
530800	BILLING SERVICES				
530600	BILLING SOFTWARE MAINT				
530900	CONTRACT PATCH	46,350	47,740	47,740	49,175
531600	POLICE DETAILS	4,013	6,905	6,905	7,045
534100	TELEPHONE	1,265	1,470	1,470	1,545
534800	GIS MAINTENANCE	10,782	30,000	30,000	30,000
538200	OUTSIDE LABOR	5,990	5,810	5,810	5,985
553100	PUBLIC WORKS SUPPLIES	63,698	64,995	64,995	66,945
553500	METER MODERNIZATION				
569400	MWRA ASSESSMENT (R)	4,664,723	4,672,173	4,624,861	4,854,094
573400	STREET OPENING PERMITS	200	6,000	800	6,000
578500	SEWER RESERVE	63,560	76,685	60,000	78,985
585200	BILLING SOFTWARE UPGRADE	16,850	91,850	91,850	20,000
	<b>TOTAL OTHER EXPENSES</b>	<b>4,991,331</b>	<b>5,157,383</b>	<b>5,083,186</b>	<b>5,297,919</b>



**Town of Belmont**  
**SEWER ENTERPRISE EXPENDITURES**  
**Fiscal Year 2017**

<b>Org &amp; Object #</b>	<b>Account Title</b>	<b>FY15 ACTUAL</b>	<b>FY16 BUDGET</b>	<b>FY16 EST EXPENSES</b>	<b>FY17 PROPOSED BUDGET</b>
<b><u>6607102</u></b>					
591208	Sewer Prin to FY16	125,000	125,000	125,000	-
	Old MWRA Issues	-			
591216	Sewer MWRA to FY 11				
591217	Sewer MWRA to FY19	75,086	111,881	111,881	111,881
591221	Sewer MWPAT to 2031	292,902	321,551	321,551	446,669
591218	Sewer Prin - new debt				
<b><u>6607512</u></b>					
591208	Sewer Int to FY16	73,888	63,575	63,575	
591221	Sewer MWPAT to 2031	172,435	222,776	222,776	176,823
	DEP CWSRF pt 1				
	DEP CWSRF pt 2				
	MWRA I/I 2012				
558900	Sewer Int - new debt				
591221	MWPAT Origination Fee		63,199	63,199	142,509
591218	Sewer Int - new debt	256,881	93,037	93,037	97,171
	<b><u>TOTAL DEBT SERVICE</u></b>	<b><u>996,192</u></b>	<b><u>1,001,019</u></b>	<b><u>1,001,019</u></b>	<b><u>975,053</u></b>
	ADMINISTRATION COST				
	<b><u>INTERGOVERNMENTAL</u></b>				
<b><u>6604</u></b>					
596000	INDIRECT COST REIMB TO TOWN	126,875	130,000	130,000	133,000
596608	TRANSFER TO OPEB TRUST	5,294	7,335	7,335	7,335
	TRANSFER TO PAY DOWN DEBT PRIN				
		<b><u>132,169</u></b>	<b><u>137,335</u></b>	<b><u>137,335</u></b>	<b><u>140,335</u></b>
<b><u>66550233</u></b>					
	RADIO Conversion				
589500	FY00 SEWER I & I CONSTRUCTION				
<b><u>66550683</u></b>					
587000	TRUCKS	119,600	178,500	178,500	179,370
<b><u>66550703</u></b>					
585000	GIS ENGINEERING AND HARDWARE				
<b><u>66550663</u></b>					
589500	SEWER & DRAIN REPLACEMENT	300,000	300,000	300,000	500,000
589500	Phase I Smart Meter Program				500,000
<b><u>66550673</u></b>					
589500	SEWER BOND				
	<b><u>CAPITAL OUTLAY</u></b>	<b><u>419,600</u></b>	<b><u>478,500</u></b>	<b><u>478,500</u></b>	<b><u>1,179,370</u></b>
	<b>TOTAL SANITARY SEWER MAINT</b>	<b>7,555,501</b>	<b>7,851,436</b>	<b>7,765,382</b>	<b>8,699,458</b>

**Town of Belmont**  
**SEWER ENTERPRISE EXPENDITURES**  
**Fiscal Year 2017**

<b>Org &amp; Object #</b>	<b>Account Title</b>	<b>FY15 ACTUAL</b>	<b>FY16 BUDGET</b>	<b>FY16 EST EXPENSES</b>	<b>FY17 PROPOSED BUDGET</b>
<b>6604441</b>	<b>STORMWATER MAINT. (R)</b>				
511000	FULL TIME WAGE	195,641	204,276	189,276	209,482
514800	LONGEVITY	650	1,050	1,100	1,150
515500	CDL STIPEND	5,220	5,200	5,200	5,200
517000	HEALTH INSURANCE	38,580	42,115	42,115	48,855
517200	WORKERS COMP.	-	-	-	-
517800	MEDICARE	3,092	3,100	3,100	3,177
519003	CLOTHING ALLOWANCE	2,460	3,280	2,187	3,280
	<b><u>PERSONAL SERVICES</u></b>	<b><u>245,643</u></b>	<b><u>259,021</u></b>	<b><u>242,978</u></b>	<b><u>271,144</u></b>
<b>6604442</b>					
522900	ELECTRICITY	267	600	600	630
527300	RENTAL EQUIPMENT	9,489	13,325	13,325	13,725
529700	SOIL REMOVAL	-	10,000	-	10,000
530002	ABC STORMWATER GAUGE	8,000	8,665	8,665	8,665
530006	STORMWATER REGULATION	1,211	50,000	50,000	50,000
530900	CONTR PERM PATCH	18,260	18,810	18,810	19,375
538200	OUTSIDE LABOR	59,473	73,230	73,230	77,960
553100	PUB. WKS. SUPP.	18,688	19,545	19,545	20,130
573400	STREET OPENING PERMITS	-	4,000	-	4,000
591208	MWRA LOAN REPAYMENT				
	<b><u>TOTAL OTHER EXPENSES</u></b>	<b><u>115,388</u></b>	<b><u>198,175</u></b>	<b><u>184,175</u></b>	<b><u>204,485</u></b>
6604443					
587000	<b><u>REPLACE OFFICE EQUIPMENT</u></b>				
	<b>TOTAL STORMWATER MAINT.</b>	<b>361,031</b>	<b>457,196</b>	<b>427,153</b>	<b>475,629</b>
	<b>TOTAL SEWER ENTERPRISE</b>	<b>7,916,532</b>	<b>8,308,632</b>	<b>8,192,535</b>	<b>9,175,087</b>
	SANITARY SEWER MAINTENANC	2,763,903	3,049,263	3,010,521	3,712,364
	MWRA SEWER ASSESSMENT	4,664,723	4,672,173	4,624,861	4,854,094
	INDIRECT COST REIMBURSEMEN	126,875	130,000	130,000	133,000
	STORMWATER MAINT	361,031	457,196	427,153	475,629
	<b>TOTAL SEWER ENTERPRISE</b>	<b>7,916,532</b>	<b>8,308,632</b>	<b>8,192,535</b>	<b>9,175,087</b>
	Budgeted Enterprise Revenue				
	Total Revenue to be raised	7,641,532	8,033,632	7,917,532	8,400,087
	Planned use of Retained earnings	275,000	275,000	275,003	275,000
	Phase I of Smart Meter Program				500,000
	Total Revenues	7,916,532	8,308,632	8,192,535	9,175,087

FY17 Budgets are estimates and further final information expected for MWRA assessments and capital as well as Retained Earnings



# Warrant Committee Report Town of Belmont FY 2017 Budget

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May 2016

## **2015 – 2016 Warrant Committee Members**

*John Alcock*

*Adam Dash*

*Roy J. Epstein (Vice Chair)*

*Jennifer Fallon*

*James Gammill (Secretary)*

*Anne Helgen*

*Michael Libenson (Chair)*

*Paul Lisanke*

*Robert McLaughlin*

*Christine McVay*

*Gregory Mennis*

*Robert Sarno*

*Ellen Schreiber*

*Ed Starzec*

*Ex officio*

*Sami Baghdady, Board of Selectmen*

*Susan Burgess-Cox, School Committee*

*Laurie Slap (former Member, School Committee)*

## Introduction

### Town Meeting, June 6, 2016

*Authorization: As prescribed by the Town of Belmont's By-Laws, it is the duty of the Warrant Committee to consider for all town meetings all articles in the Warrant that involve an appropriation of money and to report thereon to Town Meeting. The Warrant Committee is specifically charged with recommending a budget to Town Meeting and such recommendations are contained herein.*

#### **I. Background on budget development: 2015-2016**

Last year's override made for a relatively straightforward budgeting process this year, in part by allowing additional, planned expenditure to address growing school enrollment and special education costs as well making further investments in roads and sidewalks.

Late in 2015, we developed a perspective on Belmont's available revenue, including property taxes, local fees and other revenues, such as motor vehicle excise taxes, and what the state budget would likely be, determining the level of state aid. After subtracting out the fixed costs, such as pensions, Minuteman, and roads override funds, the total operating budget was identified. This allowed us to determine a starting point allocation of available revenues for both Municipal (or Town) and School budget categories.

The Board of Selectmen, School Committee, and Warrant Committee agreed to use the assumptions laid out by the Financial Task Force (and that were the foundation for the override discussion) to set the starting point for FY2017 and all departments started their budgeting work using these targets set in December. As is typical, this revenue picture has been refined, such as with more accurate numbers on state aid becoming clear, and with greater clarity on expense requirements, such as the need to fit out additional classrooms to support enrollment growth. These limited adjustments have been made and are reflected in the budget to follow.

There are two important impacts to our budgeting this year that cause disruption in year-over-year comparisons. First, the ongoing process of consolidating School and Town facilities operations has resulted in a large portion of the School facilities budget to be shifted to the Public Services budget (on the Town side), specifically \$2,529,417. This creates the inaccurate impression that the School budget has relatively small growth (0.9%) and the Town budget has relatively large growth (12.0%). Without this movement, the growth rates would have been 6.0% and 4.0% respectively. Second, Belmont received an insurance settlement of \$985,000 regarding the fire stations and these funds have been added to the Capital budget to pay for directly related costs at the fire stations. Additionally, FY2016 had \$290K in bonding costs for BHS fire alarms and Public Safety radios. Using a more apples-to-apples comparison, the Capital (Discretionary) budget has actually grown by 7.2% vs. the 44.7% seen below.

## II. Overview of FY2017 budget

The net result of these developments is a recommended budget for FY17 of \$106,331,620 (Exhibit 1).

### Exhibit 1: Overview of FY2017 Budget vs. FY2016 (Adj.) – \$000's

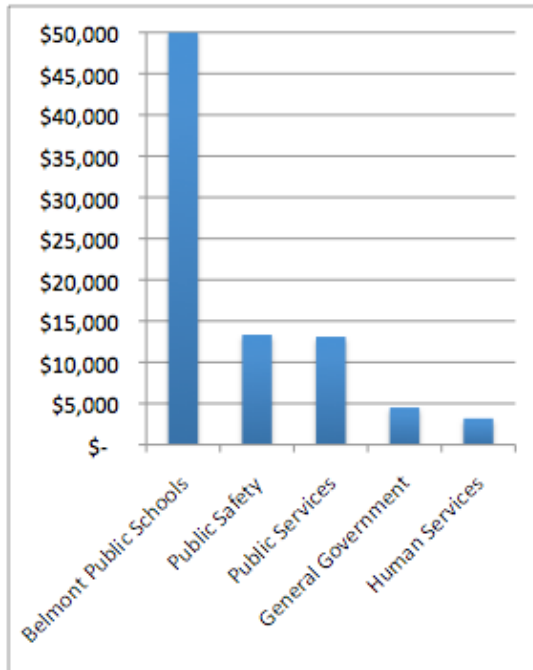
	<b>FY2016 (Adj.)</b>	<b>FY2017</b>	<b>% Change</b>	<b>Notes</b>
<b>Total Budget</b>	\$ 100,303	\$ 106,332	6.0%	5.0% without fire settlement
minus fixed costs*	\$ 15,827	\$ 16,600	4.9%	
<b>equals operating budget</b>	\$ 84,476	\$ 89,732	6.2%	
School	\$ 49,660	\$ 50,127	0.9%	6.0% without Facilities change
Town	\$ 32,998	\$ 36,974	12.0%	4.0% without Facilities change
Capital Budget (Discretionary)	\$ 1,818	\$ 2,631	44.7%	7.2% without fire & other changes

\*Legally binding obligations such as: pensions, debt repayment, state charges (e.g., MBTA), capital budget (roads override), Assessor's abatement reserves, and assessment for Minuteman Vocational Regional School

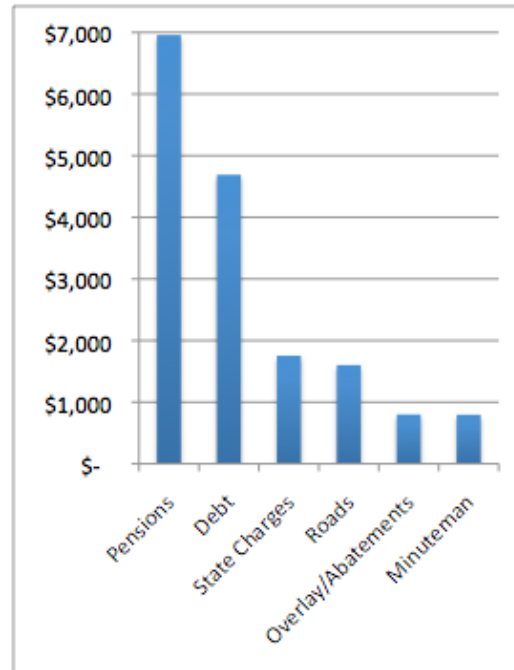
### FY2017 Budget Highlights

- The override has allowed Belmont again to maintain level services across Municipal budgets, avoid major cuts in the School budget, and make ongoing investments in capital (roads, etc.)
- The School budget is increasing by 0.9% from General Funds [note: really, 6.0% prior to shifting Facilities costs] with an incremental 5 FTEs to cover increased special education and enrollment costs; the Schools budget at \$50.1 million is 55.9% of the Operating Budget (Exhibit 2)
- Municipal budgets increased by 12.0% [note: 4.0% absent Facilities shift], retaining at least level services
- Pensions and debt account for 70.2% of fixed costs (which grow by 4.9% overall), with Pension costs rising by \$455,365 (or 7.0%) and debt expense rising by \$289,613 (or 6.6%) (Exhibit 3)
- Capital Budget (Discretionary) is growing by 44.7% due to \$985K in settlement proceeds for the two fire stations; otherwise, the Capital Budget builds on the increase from last year's override growth (+7.2%)
- Rising compensation, special education costs, and school enrollments are key drivers causing overall expenses to continue to rise faster than revenue, putting pressure on future budgets

**Exhibit 2: Operating Budget by Department**



**Exhibit 3: Fixed Costs by Expenditure**



### III. Departmental Highlights

The key analyses and recommendations for specific departments are summarized below. Detail and support is provided in the report that follows.

#### **Education** (*Belmont Public Schools and Minuteman*)

1. Special Education expenses continue to grow at an exceptionally high rate. Total spending on Special Education programs, including in the Pre-K classrooms, is budgeted at \$15.6 million in FY 2017, up \$1.7 million (and 12%) from the FY 2016 budget.
2. The district expects enrollment to be up 100 students in FY2017, an increase of 2.3%. Higher enrollment brings new strains to many aspects of the school programs and budget.
3. Total compensation costs for FY2017 are budgeted to be 3.7% higher than in the FY2016 budget. Negotiations for the next round of three-year contracts will begin in the fall of 2016. Since salary and benefit expenses to current employees make up 72% of the total school budget, the outcome of these contract negotiations will have a significant impact on subsequent budget preparations.

4. *Minuteman*: Belmont stands at an important crossroads with this month's disapproval of the debt authorization for the planned new school. We hope to open a path forward to resolve Belmont's obligation to provide vocational education alternatives for its students in an appropriate and fiscally responsible way.

**Public Services** (*Department of Public Works (DPW), Community Development (CD), Facilities*)

1. Budget constraints limit infrastructure investment and maintenance of existing town facilities and assets. The new Underwood Pool is anticipated to have high membership, and the fees are expected to cover operating costs and possibly provide a surplus for future upkeep. The DPW yard and the Vigliolo skating rink are both past their useful life, and need replacement. The solid waste and recycling contract was extended for two years, which will allow ample time for community discussion of future disposal options.
2. Community Development is hiring a new Planner position, as the workload has become too much for one person. Expansion of online filing of permits will lead to efficiency and easier tracking. CD is budgeting additional funds for the management of Rock Meadow in FY2017.
3. The new combined Facilities department allows for better planning, economies of scale in ordering, and a more holistic approach to capital budget matters. While the Department manages the Library's maintenance staff, it does not yet control the Library's facilities budget or capital projects. Consolidation of the Town and School security personnel and systems is being explored. A facilities audit found about \$14 million in trade costs alone for repairs to the current buildings in Town, such as school building envelopes and boiler replacements. It is not clear what budget amounts will actually be available to address these issues near term.

**Public Safety** (*Police, Fire, Emergency Management*)

1. The value of recent and proposed Town investments in Public Safety computer hardware, software and related equipment will be realized only if the next steps – customizing data to provide information useful in the management of resources and improving network efficiencies – are a priority of the departments and the Town. In addition, focus on technological improvements, such as computerizing shift schedules, are bringing new efficiencies to the departments.
2. As a result of key retirements, there will be a loss of institutional knowledge and leadership in late FY2017 and FY2018 at the Fire Department. A broader strategic process will help ensure a smooth transition that also matches Town strategic plans.
3. Any decision to add new resources, particularly the addition of an ALS coordinator or incremental personnel to accommodate new growth, requires a disciplined and data-driven analysis of the costs/benefits of expanding the departments.

**General Government** (*Financial departments: Assessors, Accounting, Treasurer; Administrative departments: Human Resources, Information Technology, Town Administrator, Town Clerk*)

1. The Town Administrator department, under the oversight of the Board of Selectmen, will be significantly occupied with launching, progressing, or completing numerous projects that are highly visible and important to town residents, including the Belmont High School / MSBA



process, the recreation strategic plan, the solid waste contract, renovation of the MBTA Waverley Station, the community path feasibility study, the skating rink public/private partnership, the Verizon cable TV license agreement, completion of the Belmont Center project, progress on the Cushing Village project, and the implementation of additional Financial Task Force recommendations.

2. The Town Clerk's office faces a challenging year with the upcoming presidential election, which traditionally brings a registration increase of more than 1,000 voters, as well as 85% turnout on Election Day. Implementation of the new Election Reform Law will require early voting, pre-registration of 16 and 17 year olds, online voter registration and post-election audits, necessitating many new processes and training. In addition, many of Belmont's election workers are seniors and recruiting, qualifying and training ~50 replacements has been a major focus.
3. Cybersecurity is a particular focus and challenge for the Information Technology Department, as government networks are continually attacked through viruses, malware and direct hacking. All applications connected to the town network are penetration tested. A mobile device management system is being implemented, a password management system is in place, and over 1,000 software patch updates are installed each year. One area that cannot be protected by any software or hardware solution is the email that utilizes social engineering to attempt to extract personal information for identity theft, so a comprehensive program of Security Awareness Training is being rolled out. At the same time, the Town network is backed up every 15 minutes in order to mitigate loss in the case of a breach.

#### **Human Services** (*Council on Aging (COA), Health, Library*)

1. Approximately 5,000 (or one-fifth) of the Belmont residents are over age 60. This past year the COA with modest level funding continued to expand its services and programs and reached more than 2,000 different users. As in prior years, to fund its programs the COA successfully leveraged their funds by seeking grants, donations, revolving funds and volunteer services. This year, the COA budget proposes to fill a gap and provide social service coverage during the summer months.
2. The Health Department is challenged with many more public health needs than it has staff to implement. Global crises like the Ebola and Zika viruses require significant emergency preparation, while locally, the opioid epidemic and Healthy Homes initiative (to address hoarding) are top public health priorities. By shifting some resources in the FY2017 budget, the department will be able to outsource some routine food inspections, freeing professional staff time to focus on some of these strategic initiatives.
3. The Library's budget is slated to increase by 3.1% to continue fulfillment of its mission, serving as a resource for equal and open access to information to meet the diverse needs and interests of the citizens of Belmont. Staff and the Board of Trustees have worked to complete a long-term plan and are in the process of implementing a feasibility study to determine infrastructure needs. The Library will have additional part-time staff to expand hours in the Children's Library.

#### **IV. Risks and Concerns regarding the FY2017 Budget**

The FY2017 budget cycle was impacted positively by over \$4.6 million in incremental revenue from the passage of the override. The state economy appears strong, which should insulate us against midyear cuts in state aid. We have an experienced team across the board in Town and School leadership.

There are, however, three areas that require ongoing attention:

- Special Instruction costs (including Special Education and ELL) continue to occupy a larger and larger percent of the Education budget, growing at 12.5% in FY2017 vs. 2.6% growth in the Regular Instruction budget. This cost category, particularly out-of-district placement and transportation costs, is difficult to forecast and small changes can have meaningful impact. Currently, the Special Education Stabilization Fund is effectively empty and therefore cannot provide a buffer.
- The Belmont Public Schools have experienced unusually large enrollment growth in the past few years, with 426 new students added from October 2010 to the October 2015 census. The School department forecasts an additional ~100 new students in FY2017. This number is inherently uncertain.
- Belmont's model of self-insurance for healthcare has enabled budgeted cost to remain relatively flat once again in FY2017, with budgeted 2.5% growth. If our actual experience with healthcare expenses exceeds our forecast, these additional costs would need to be absorbed. Belmont does employ reinsurance policies to manage extraordinary events.

#### **V. Free Cash and Stabilization Fund Update**

By law, the MA Department of Revenue certifies each city or towns free cash as of July 1 of a given year. Belmont started FY2016 with \$7,604,052 in certified Free Cash. Last year, the Board of Selectmen and Warrant Committee agreed upon a Free Cash Guideline which is that Belmont will seek to maintain Free Cash in the amount of 3-5% of the current year's General Fund Revenue Budget (with a target of 4%). As the FY2016 General Fund Revenue Budget was voted to be \$100,293,295, this would suggest currently holding between \$3.1 million and \$5.1 million in Free Cash.

Earlier this month, Town Meeting voted 237 to 5 to allocate \$1.45 million in Free Cash for the Chenery Modularity. The FY2017 budget allocates \$1.70 million in Free Cash to the operating budget and assuming Town Meeting approves the OPEB Stabilization Fund contribution of \$316,530, Belmont will retain \$4.1 million in Free Cash, or 4.0% of the FY2016 General Fund Revenue Budget.

As we experience each year, it is expected that we will replenish our Free Cash balance to some degree as of the July 1, 2016 certification, due to revenues in excess of budget and expense turnbacks. The six-year average for Free Cash replenishment is \$3.0 million. Some amount close to this will be necessary if we are to use ~ \$1.5 – \$2.0 million of Free Cash in the FY2018 operating budget and protect ourselves against future unexpected costs, such as snow removal.

Town Meeting has now created three stabilization funds — each effectively “rainy day funds”. The Special Education Stabilization Fund was established in 2012, with \$250,000 voted to cover extraordinary special education costs. The full amount of the original deposit was withdrawn by vote of Town Meeting on May 6, 2015 and it is currently uncertain whether that fund will be replenished. Two new stabilization funds were created last June: first, a General Stabilization Fund to hold the \$1.67 million of override funds not spent in FY2016 (but rather intended to extend the impact of the override as long as possible) and, second, a Major Capital Stabilization Fund that is expected to hold one-time revenues from the sale of Town assets and possible excess Free Cash (beyond the 5% Free Cash Guideline upper-end). This Major Capital Stabilization Fund is currently empty but its objective is to help address three very large capital projects: the DPW facility, the police station, and the library. Note that the initial Belmont High School funding of \$1.75 million was just voted this month to come directly from the proceeds of the sale of the Woodfall Road property.

The Warrant Committee acts in the belief that taxpayer monies must be deployed with the greatest possible efficiency and effectiveness and that overrides in Belmont are rare. It will be a top priority of the Warrant Committee to ensure that the current override is sufficient to balance Belmont's budget for as long as possible. The three stabilization funds are an important part of that strategy.

While Free Cash represents one-time funds — and therefore is most appropriately used for one-time expenditures — it is important to point out that the regular replenishment of Free Cash from excess revenues or expense turnbacks is the core rationale for Belmont traditionally using of approximately \$1 – \$2 million of Free Cash for the operating budget. Any use of one-time funds for the operating budget to avoid an override — whether they are taken from Free Cash or the General Stabilization Fund — is only sustainable to the degree that those funds are replenished. If not, Belmont's cash will eventually run out.

## **VI. Commentary on Long-Term Trends**

The headwinds that drove last year's override are the continuation of several long-term trends that we have been managing for years and will continue to do so. There are four major drivers on the expense side: 1) increasing compensation costs, 2) enrollment growth and mandated school costs, 3) increasing capital investment / maintenance costs, and 4) our large pension and healthcare obligations.

### **1. Compensation**

Compensation costs represent 68.0% of the overall Belmont budget. As such, controlling compensation growth and matching it to revenue growth will remain a vital factor in keeping our budget in balance for years to come.

Many Municipal and School employees are unionized, with contracts that are typically negotiated every three years. Our last teacher contracts, for example, were finalized in 2014 and include growth that exceeds our forecasted revenue. The outcome of upcoming contract negotiations is perhaps the single most important factor in Belmont being able to maintain a balanced budget without either draconian expense reductions or additional tax increases. While we certainly value hiring and retaining top quality talent across the municipal and school employment spectrum,

managing salary inflation to match revenue growth is arguably our most important task on an on-going basis.

## **2. Enrollment Growth and Mandated School Costs**

Belmont's school system is clearly a powerful motivator in attracting new families to move here, including from all over the world. Over the past ten years, student enrollment has increased by 720 students, more than the total populations of any of our four elementary schools. Maintaining classroom sizes has necessitated more teachers and aides.

The School Department anticipates another 400 students entering the system in the next four years, including 106 new students expected to come from the Cushing Village and Uplands developments. Funded by the override, Belmont will have hired fifteen new FTEs over the FY2016 and FY2017 budgets and five more are expected in FY2018.

Growth in Special Education and ELL costs has also contributed significantly over time, with meaningful forecast growth in the coming years. In FY2017 alone, Special Education costs are increasing by \$1.7 million, or 12% – representing the single largest expenditure increase in the entire budget. Managing these mandated costs will require creative and thoughtful effort over time, as meeting student needs is the necessary priority.

## **3. Capital, Maintenance, and Infrastructure**

Decades of underfunding maintenance of our roads, sidewalks, and other capital assets have added to our current burden. The Pavement Management Committee analysis of 2007 determined that 69% of our roads would have to be completely re-built from the dirt up — a far more expensive proposition than preventative maintenance.

Last year's override deploys \$620-750K per year in additional funds for roads, sidewalks, and other capital. The goal, in part, is to increase the level of preventative maintenance so that the more recently repaved roads are kept from deteriorating to the point that more expensive, complete replacement is required. In fact, in FY2017, Belmont will spend \$2.5 million on our roads and sidewalks, close to the maximum amount that Community Development can reasonably spend during the months with weather amenable to pavement work.

Beyond the roads, in 2011, Town Meeting voted to create a consolidated Facilities Management group (and Director) under the oversight of the Town Administrator and Belmont Schools Superintendent. This team, in collaboration with the other Town Departments and the Capital Budget Committee, will continue to identify the most critical maintenance and capital asset management opportunities.

It is important to note there remains a list of large capital projects that Belmont expects to initiate over the next nine years, most notably the high school, DPW facility, police station, and library. The impact here is more on borrowing costs vs. operating expense but the cost of these new projects will likely be meaningful for taxpayers — with cost estimates in the range of \$200 million overall.

The Belmont High School project is the largest capital project in the history of Belmont. Now that Belmont has received MSBA approval, a building committee has been formed, and \$1.75 million (from the sale of the Woodfall Road property) was appropriated by a vote of 237-7 to fund the feasibility study and other activities. Other key decisions remain, including a likely Town-wide debt exclusion vote.

#### **4. Pension and Healthcare Obligations**

*Employee pensions.* In decades past, Belmont underfunded its pension obligations, creating an unfunded liability of over \$74MM. In recent years, we have worked in collaboration with the Belmont Retirement System to establish and maintain an aggressive funding schedule that pays down our unfunded liability by 2027.

Underfunding our pension obligations in the past has both increased the burden on current taxpayers and contributed to the forecasted budget deficits that the override was designed to address. In FY2017, for example, we are budgeting \$6,958,000. This amount is scheduled to grow at 7% each year, increasing the fiscal pressure. It is important to note that Belmont conducts a biennial actuarial valuation to evaluate investment performance and other factors, enabling us to regularly evaluate our funding strategy.

The current plan is to continue to pay off our unfunded liability by 2027, prior to the state-mandated goal of 2040, as this leaves some cushion in the event of a financial downturn. When the pension liability is fully funded, Belmont plans to pre-fund retiree health care benefits.

Finally, following Town Meeting's request last spring, the Warrant Committee provided Town Meeting with a Pension Report in October 2015 and held a public hearing to discuss the Report (available at [http://www.belmont-ma.gov/sites/belmontma/files/file/file/pension\\_report\\_final\\_10-15-15.pdf](http://www.belmont-ma.gov/sites/belmontma/files/file/file/pension_report_final_10-15-15.pdf)). The Warrant Committee will continue to work with the Retirement Board to explore options for lessening the operating impact of pension growth, while retaining a prudent approach to funding.

*Healthcare, including other post-employment benefits (OPEB).* Overall, healthcare costs represent one of the most significant management challenges for Belmont. Nationally, healthcare inflation has been more than double overall price increases for the past 30 years (215% vs. 100%). These rising costs impact our annual budget as well as our retiree healthcare obligations, otherwise known as OPEB. In recent years, Belmont has done a very good job on this front through self-insurance and effective negotiations, keeping growth at or near 0%. At the national level, healthcare inflation has also moderated in recent years.

Future growth in healthcare costs is a major factor affecting Belmont's finances. Belmont's FY2017 healthcare inflation remains relatively low at 2.5%. This is one area that Belmont's leadership will continue to manage carefully, with the goal of mitigating these increases as much as possible.

There has been considerable discussion of the \$173 million liability for retiree benefits on the Town's balance sheet and its potential impact on the town's Aaa rating. Following the guidance of our actuarial consultants, Belmont adheres to GASB 45 rules by using pay-as-you-go funding as well as an annual contribution to future liabilities. Specifically, the FY2017 budget includes

\$2,830,516 to pay for health care benefits for currently eligible Belmont retirees (Municipal and School), although the total cost of retiree health benefits is substantially higher when including subsidies provided to pre-Medicare-age retirees (which is included in the Town's budget for health insurance that covers active employees).

An OPEB Study Group is currently gathering important data that will allow Belmont to gain greater clarity regarding our OPEB liability. For example, our existing valuation of our unfunded liability is based in part on average costs statewide vs. those experienced in Belmont. We expect to learn much more in the coming year about our actual existing liability and options we have to manage it.

The financial articles also include a contribution of \$316,530 to the OPEB Stabilization Fund to support future benefit payments. In addition, the Town has implemented a series of measures to address the future cost of these benefits including: changes to health insurance plan design, required participation in Medicare for eligible retirees, and providing the state allowable minimum 50% contribution for retiree health insurance. Finally, funding that is now allocated annually to cover pension costs may be available for the OPEB obligation once the unfunded pension liability is fully funded.

## **VII. Organization of the Report**

As in the past, the Warrant Committee takes a programmatic approach to analyzing the budget. Under this approach, we identify the programs provided by each department and then analyze the cost and FTE allocations of those programs. For each department, we have provided a description of the core mission and services provided. We then present a spending overview on a programmatic basis. An expense analysis follows, detailing and explaining those expense items that have changed by more than \$5,000 and 5%. There is description of proposed additions to programs and services, whether budgeted or not. Where useful, we have included special analyses on issues confronting a department. Each section concludes with a recap of progress with respect to recommendations made in FY2016, and then our observations and recommendations for FY2017. We continue to refine this format and welcome all feedback on how to make this report more useful to Town Meeting Members. Our email address is [warrcommpublic@belmont-ma.gov](mailto:warrcommpublic@belmont-ma.gov).

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## General Government

*Article 10 A: That under General Government, **\$4,510,412** be raised and appropriated.*

General Government departments are responsible for the administrative, financial, legal, and management functions of the Town. They are Town Clerk, Town Administration, Human Resources, Information Technology, Town Accountant, Town Treasurer, and Assessors' Office.

### Town Clerk

#### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$450,089	\$50,284	12.58%	4.50

#### Department Mission / Description of Services

*Mission:* To support town governance by gathering, recording and communicating vital information in a timely and accurate manner.

*Services:* (a) Elections and Registration: conduct elections, maintain the town census and voting lists, promote voter registration and participation; (b) maintain the town's vital records from 1859 to present, issue licenses, maintain information about Town Meeting, boards and committees in compliance with Open Meeting Laws, ensure compliance with ethics and campaign reporting requirements; and (c) Legislative: provide information support to Town Meeting members and support to conduct Town Meeting.

#### Budget by Program

Most of the cost is distributed between two areas – Elections and Registration and Town Clerk responsibilities.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Elections & Registration	1.40	31.1%	230,645	51.2%
Town Clerk	3.00	66.7%	200,216	44.5%
Legislative	0.10	2.2%	19,228	4.3%
<b>TOTAL</b>	<b>4.50</b>	<b>100.0%</b>	<b>450,089</b>	<b>100.0%</b>

#### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.



Line Item	FY2017	Prior Year	% Change	Explanation
Full Time Salaries	\$84,227	\$77,592	8.6%	More elections so work more 40hr weeks (instead of 35hr)
Election Poll Workers/Tabulators	\$76,950	\$49,716	54.8%	More elections so more poll worker time

**Requested Adds (not included in the budget above)**

None.

**Special Analysis and Observations**

In FY17, budgeting for 3 planned elections (Sep, Nov, Apr) plus 1 unplanned. In FY16, hired and trained 48 new/replacement poll workers in preparation for presidential election - in service for March 2016 election.

*Vital records digitization project (CPA funded)* : Completed part 1 evaluation; part 2 scanning; part 3 indexing. Part 4 stabilizing old books underway based on prioritization. Next projects might include indexing Town Meeting minutes and votes, annual reports, Board of Selectman minutes and votes.

## Town Administration

### Budget Overview

FY 2017	\$ change from prior year	% change from prior year	FY 2017 FTEs
\$1,016,374	\$13,095	1.31%	5.00

### Department Mission / Description of Services

*Mission:* Under the policy direction of the Board of Selectmen (BOS), the Town Administrator shall: (i) serve as the town's chief administrative officer; (ii) act as the agent for the BOS; (iii) be responsible to the BOS for the proper operation of town affairs for which said administrator is given responsibility; (iv) supervise, direct and be responsible for the efficient administration of all departments and employees under the jurisdiction of the BOS; and (v) perform all functions for which the administrator is given responsibility, authority or control by this act, by-law or by vote of the BOS.

*Services:* (a) Oversee and coordinate activities of Town departments; (b) initiate and organize planning and budgeting; (c) serve as senior point of contact for residents regarding town services and issues.

### Budget by Program

The largest amount of time and resources are spent in General Management services, which includes but is not limited to, meeting with department heads, overseeing and procuring insurance, and handling community relations. Legal Services takes the next largest amount of resources.

Program	FTEs	FTE %	Budget \$	Budget %
General Management	5.00	100.0%	585,036	57.6%
Board of Selectmen	0.00	0.0%	126,338	12.4%
Legal Services	0.00	0.0%	297,500	29.3%
VFW Lease Agreement	0.00	0.0%	7,500	0.7%
TOTAL	5.00	100.0%	1,016,374	100.0%

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

Line Item	FY2017	Prior Year	% Change	Explanation
Health Insurance	\$71,150	\$77,160	-7.8%	Employee changed health insurance choices
Pension Fund*	\$6,958,000	\$6,502,635	7.0%	Approved pension funding schedule
Workers Compensation*	\$123,152	\$112,050	9.1%	Estimated policy cost increase
Health Insurance*	\$58,320	\$0	NA	Aggregated 2.5% increase for all Town employees
Salary and Benefit Reserves*	\$882,287	\$826,686	6.7%	Salary reserve for public safety contracts under negotiation

\* these numbers are not included in the Town Administrator's budget total

### Requested Adds (not included in the budget above)

None.

### Special Analysis and Observations

This department is undertaking new tasks, such implementation of new water and sewer billing and collection system, the new Belmont High School project, the Recreation Strategic Plan, and preparing to bid the solid waste contract in two years. A consultant will be hired for the community path project. Work is being done with other affected towns regarding the Logan Airport noise increase.

### Recommendations

#### Recap of Prior Year Recommendations

Recommendation	Status
Work with school department to streamline services wherever possible	Cooperation still going well, bringing in Library under new consolidated facilities department. The facilities departments have been combined.
Regionalization	Opportunities are explored as they arise, but it is difficult to accomplish due to disparate contracts, unions, pensions, OPEB and politics.
Further use of technology	Combining billing systems, working to automate room reservations. Some permit applications have been made available online.
Re-work the VFW payment/lease	The Financial Task Force has looked into this.
Re-bid legal services	Legal services budget should be put out to bid again, or exploration of savings with in-house counsel should be explored.
Market Town Hall for rentals	More promotion has led to more rentals
Better coordination between small departments	This has been done.
More training regarding IT resources	This has been done.

### FY 2017 Recommendations

Recommendation	Rationale
Issue the remaining alcohol licenses	The Town is still holding several full alcohol restaurant, and several beer/wine restaurant, licenses. Issuing them will lead to more revenue.

## Human Resources

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$292,784	\$7,862	2.76%	2.92

### Department Mission / Description of Services

*Mission:* Provide a range of personnel services to the Town.

*Services:* (a) Benefits administration for current employees, retirees and survivors; (b) management of employee/labor relations including contract negotiations, grievances, performance policies and handbooks; (c) implementation of pay and position classification including maintenance of job descriptions and pay plans for all employees; (d) recruiting and overseeing training for employees in compliance with contracts and state and federal regulations; and (e) providing information and assistance on HR-related matters to residents, prospective applicants, other municipalities and government agencies.

### Budget by Program

Time and money are divided among Benefits Administration services including health, dental and life insurance and flexible spending and deferred compensation plans, labor relations and negotiations, pay and classification plan matters, and general assistance to employees, agencies and the general public.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Benefits Administration	0.39	13.4%	36,473	12.4%
Employee/Labor Relations	0.54	18.5%	59,406	20.3%
Pay and Classification	0.63	21.6%	61,095	20.9%
Recruitment & Retention	0.78	26.7%	80,993	27.7%
Other	0.58	19.9%	54,817	18.7%
TOTAL	2.92	100.0%	292,784	100.0%

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

Line Item	FY2017	Prior Year	% Change	Explanation
Professional Services	\$10,000	\$3,500	185.7%	To cover background checks for new Fire Department employees no longer provided by Police Department state and federal resources due to changes in law.

**Requested Adds (not included in the budget above)**

None.

**Special Analysis and Observations**

The addition of the position of HR Generalist to the Department has made a very positive difference to the services offered and what can be accomplished. New projects under the new HR Director have included improvement of the HR portion of the Town web site, significant efforts to increase training opportunities either for free or with outside resources, collaboration with School, Finance and IT Departments to accommodate reporting requirements under the Affordable Care Act, restarting the Town Safety Committee with Town departments and the School Department to collaborate on training needs, workers compensation issues and grant opportunities, and hosting a regional two-day OSHA training. Ongoing projects will include working with the IT Department to increase efficiency and move to a "paperless" office and negotiating with all eight Town unions with contracts set to expire on June 30, 2017.

## Information Technology

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$874,071	\$-30,353	-3.36%	5.00

### Department Mission / Description of Services

*Mission:* Provide the technology infrastructure for the town government.

*Services:* (a) Maintain core network infrastructure (including backup and security); (b) provide essential enterprise software systems; (c) provide coordinated support for GIS data and software; (d) provide and maintain desktop and field hardware and software equipment, applications and support; and (e) provide user training.

### Budget by Program

Personnel expenses account for 48% of the budget, with the remainder spent on software licensing and support, computer equipment, and other non-salaried cost of services. ERP system (MUNIS) accounts for the largest share of staff time and technology training the least amount.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Desktop Services	1.05	21.0%	116,251	13.3%
ERP System Admin	1.60	32.0%	177,436	20.3%
GIS/DB Admin	1.00	20.0%	34,089	3.9%
File Server/Communications	1.00	20.0%	518,325	59.3%
Technology Training	0.35	7.0%	27,970	3.2%
<b>TOTAL</b>	<b>5.00</b>	<b>100.0%</b>	<b>874,071</b>	<b>100.0%</b>

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

<b>Line Item</b>	<b>FY2017</b>	<b>Prior Year</b>	<b>% Change</b>	<b>Explanation</b>
Health Insurance	\$65,140	\$71,150	-8.4%	Employee changed health insurance choices
Professional Services	\$30,000	\$35,774	-16.1%	Hired desktop support position, so no longer need temp
Software Licenses	\$162,866	\$255,000	-36.1%	Fewer large software upgrades
Network Support	\$93,725	\$60,000	56.2%	This FY16 line item omitted license for backup and recovery; now included
Hardware Supplies	\$32,000	\$5,500	481.8%	Delayed hardware purchase from FY16 to FY17

**Requested Adds (not included in the budget above)**

None.

**Special Analysis and Observations**

The IT department expects to complete the conversion to virtual servers in FY16 (except for applications that require dedicated hardware server). In FY17, they will continue migrating to cloud-based software for cost savings and efficient utilization of staff. In FY16, they completed the cloud-based GIS system and MS Office email; in FY17, they will move to MS Office 365.

Data back up and cybersecurity continue to be a major focus. Servers are backed up locally every 15 minutes, and then offsite 4 times/day. Government networks are continually attacked through social engineering, viruses, malware and direct hacking. Effective security protection is in place for email, servers, desktops, and mobile devices. The department conducts penetration testing for all new software, and they are currently enhancing employee training to prevent social engineering risks.



## Town Accountant

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$407,570	\$-633	-0.16%	3.70

### Department Mission / Description of Services

*Mission:* To perform accounting, auditing, procurement, and budgeting/reporting functions.

*Services:* Prepare Town financial statements, maintain general ledger, prepare required filings to MA Department of Revenue, and assist with recapitulation for tax rate certification. Auditing — work with external auditors, review internal procedures and perform fraud risk assessments, assist with Town compliance with Personal Information Protection Program Contracts/Accounts Payable, maintain custody of all contracts, prepare and approve all warrants for payments in accordance with Massachusetts General Laws. Budgets — provide financial information to all town departments, assist in preparation of department budgets and monitoring revenues and expenditures.

### Budget by Program

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Accounting	1.00	27.0%	110,381	27.1%
Auditing	0.80	21.6%	82,786	20.3%
Budgeting/Reporting	0.60	16.2%	66,229	16.2%
Accounts Payable & Purchasing	1.20	32.4%	126,939	31.1%
OPEB & New Utility Billing Software System & Other	0.10	2.7%	21,235	5.2%
<b>TOTAL</b>	<b>3.70</b>	<b>100.0%</b>	<b>407,570</b>	<b>100.0%</b>

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

<b>Line Item</b>	<b>FY2017</b>	<b>Prior Year</b>	<b>% Change</b>	<b>Explanation</b>
Health Insurance	\$28,305	\$44,590	-36.5%	Retirement

### Requested Adds (not included in the budget above)

None.

### Special Analysis and Observations

The staff is cross-functionally trained and is operating well.

### Recommendations

#### Recap of Prior Year Recommendations

Recommendation	Status
Timely information distribution	Continued progress
Use of technology	MUNIS fully implemented
Use part-time non-benefited workers whenever possible	Staffing has been rationalized

#### FY 2017 Recommendations

Recommendation	Rationale
Continue with the prior recommendations	See above

## Town Treasurer

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$681,379	\$33,771	5.21%	7.25

### Department Mission / Description of Services

*Mission:* To manage all cash collections, borrowings, investing and disbursements for the Town.

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

### Budget by Program

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Treasury Management	3.40	46.9%	300,018	44.0%
Collections	3.25	44.8%	287,251	42.2%
Parking	0.60	8.3%	94,110	13.8%
<b>TOTAL</b>	<b>7.25</b>	<b>100.0%</b>	<b>681,379</b>	<b>100.0%</b>

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

<b>Line Item</b>	<b>FY2017</b>	<b>Prior Year</b>	<b>% Change</b>	<b>Explanation</b>
Health Insurance	\$66,885	\$50,600	32.2%	Employee changed health insurance choices

### Requested Adds (not included in the budget above)

None.

### Special Analysis and Observations

None.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Town parking lot spaces priced below market	Rates increased in FY16
Use of technology	Continued growth of online tax payments
All billings and collections for water, sewer and light should be centralized in the Treasurer's Department	Water billing will be consolidated with billing system for Belmont Light
Expand Payment in Lieu of Taxes program (PILOT)	See Assessors
Encourage more use of paperless billing	Continued growth in resident use of online payment systems
Use part-time non-benefited workers whenever possible	Staffing has been rationalized

### FY 2017 Recommendations

Recommendation	Rationale
Continue with the prior recommendations	See above

## Assessors' Office

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$388,145	\$-25,763	-6.22%	3.40

### Department Mission / Description of Services

*Mission:* To list and value all real and personal property for purposes of taxation by the Town.

*Services:* The Assessor's office is responsible for listing and valuing all real estate and personal property in Belmont. It is also charged with the administration of tax exemptions, excise and real estate and personal property abatements as well as inspections and changes in value due to structural additions and modifications. It operates under the oversight and direction of an elected Board of Assessors.

### Budget by Program

FY 2017 follows the triennial year for reassessments for the Town of Belmont. With the certification by the Commonwealth complete, the Assessor's Department will have fewer expenses this year than was experienced in FY 2016.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
List & Value	1.10	32.4%	125,759	32.4%
New Growth	1.00	29.4%	114,115	29.4%
Abatements & Exemptions	0.85	25.0%	97,036	25.0%
Excise Taxation	0.45	13.2%	51,235	13.2%
<b>TOTAL</b>	<b>3.40</b>	<b>100.0%</b>	<b>388,145</b>	<b>100.0%</b>

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

<b>Line Item</b>	<b>FY2017</b>	<b>Prior Year</b>	<b>% Change</b>	<b>Explanation</b>
Health Insurance	\$16,285	\$32,570	-50.0%	Employee changed health insurance choices
Revaluation	\$90,000	\$111,500	-19.3%	Triennial certification was completed in FY16

**Requested Adds (not included in the budget above)**

None.

**Special Analysis and Observations**

Last FY experienced personnel turnover at the Assessment Technician position. It is hoped this year will bring a new employee that will be trained and will complete the staffing level needed for the department.

**Recommendations****Recap of Prior Year Recommendations**

<b>Recommendation</b>	<b>Status</b>
Focus new PILOT opportunities on new acquisitions by non-profits	PILOT discussions have not yielded new payments
Seek to further automate motor vehicle excise tax abatement process	For convenience and cost savings, the department is encouraging tax payers to file their request for a vehicle excise tax abatement online.

## Human Services

*Article 10 H: That under Human Services, \$3,182,797 be raised and appropriated.*

The Human Services departments are Council on Aging, Health Department, and Library.

### Council on Aging

#### Budget Overview

FY 2017	\$ change from prior year	% change from prior year	FY 2017 FTEs
\$410,420	\$11,548	2.90%	5.91

#### Department Mission / Description of Services

*Mission:* Provide services to enrich the ability of seniors to live safe, independent, meaningful and healthy lives. There are approximately 5,000 Belmont residents over the age of 60 which is approximately one-fifth of the population.

*Services:* Transportation; social services for seniors and their families; on-site and home-delivered meals through Springwell, a funded non-profit; fitness activities and health education; recreation, education and arts programs for socialization; volunteer service opportunities; and, senior trips. Also manages the Beech Street Center rental program. The number of different users of services and programs increased from the previous year to a total of 2,011.

#### Budget by Program

Transportation accounts for the largest percentage of FTEs (34.3%) and highest percentage of budget dollars (33.3%). FTEs for volunteers or grant-funded programs are not included.

Program	FTEs	FTE %	Budget \$	Budget %
Transportation	2.03	34.3%	136,765	33.3%
Social Services	1.25	21.2%	85,860	20.9%
Nutrition	0.12	2.0%	10,038	2.4%
Health & Wellness	0.98	16.6%	96,663	23.6%
Socialization, Adult Ed & Arts	0.42	7.1%	51,544	12.6%
Volunteer Services	0.10	1.7%	15,769	3.8%
Senior Trips	0.94	15.9%	6,970	1.7%
After Hours Facility Coordination & Rentals	0.07	1.2%	6,811	1.7%
TOTAL	5.91	100.0%	410,420	100.0%

## Expense Analysis

The \$11,548 increase in the budget is driven primarily by a \$2,500 allocation for social service professional coverage during the summer months, as well as staff salary increases and budget adjustments for gas and other incidentals. Transportation is again approximately 1/3rd of the budget and amounts to a cost of \$16.76 per ride. Transportation for the seniors is critical to many if they are to remain independent. To employ a means testing would disqualify as COA for transportation grants. Transportation expenses are supported to a small degree by State and private grants. Most of the Health and Wellness budget line items are largely self-supporting by revolving funds.

## Requested Adds (not included in the budget above)

Request	Explanation
Additional funding for additional staff to work in coordination with the Board of Health, fire, police and community development departments to inspect and monitor unsafe elderly housing conditions such as hoarding, code violations, etc.	Although the COA is currently active with these other departments, the problem of unsafe or unhealthy living accommodations for the elderly is an increasing problem that needs more resources to effectively monitor

## Special Analysis and Observations

*Data Collection* : COA data collection continues to be improved and statistics breaking out the types of rides and statistics showing the different users of the Beech Street Center programs is now available.

*Beech Street Center Rentals* : For the last full year, Beech Street gross rentals were \$14,297 net of custodial fees that the user pays. Of the total of \$6,811 budgeted relating to the Beech Street Center, approximately one-half of that cost is connected with the supervision of the rental program. Therefore, the Beech Street Center rentals now represents a profit center of approximately \$11,000.

*Overall Funding* : The Council on Aging is remarkably successful in leveraging their relatively small budget of slightly over \$400,000 to provide a wide spectrum of services to the seniors. For the last year, the COA received grants totaling \$50,465, contributions of approximately \$6,000, fees and donations in their revolving accounts for the several programs they sponsor totaling \$118,575, as well as the benefits of the Federally-funded Springwell Nutrition program valued at approximately \$108,000. This nutrition program provided approximately 11,900 on-site luncheons last year to 570 different seniors, as well as an additional 9,000 meals served to approximately 100 different home-bound seniors. In addition, the Council has received the benefit of organized volunteer services to assist seniors totaling approximately 13,600 hours.

*Intra Dept. Cooperation* : As referenced above, the COA coordinates with the Police, Fire, Board of Health and Community Development departments providing services to the elderly. In addition, they have a close working relationship with the Recreation Department, including sharing their transportation capabilities and are coordinating with the Recreation Department the use of the Beech Street Center.



## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Continue to track usage by different users particularly in the area of transportation including, if possible, breaking down the nature of trips, i.e., medical, shopping, other	Progress has been made breaking down the nature of the trips between medical, shopping, transportation to the Center, etc.

### FY 2017 Recommendations

Recommendation	Rationale
Now that statistics are available for the nature of the trips, as well as determination that the cost per trip is \$16.76, a study should be made to see if it is economical to outsource to such as Uber or taxi services some of the transportation needs of the seniors.	Transportation continues to represent one-third of the COA budget. The technological changes now supporting private services such as Uber present a possible opportunity to outsource transportation services at a cost saving.

## Health Department

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$579,793	\$12,873	2.27%	4.90

### Department Mission / Description of Services

*Mission:* Enforcement of state and local health and environmental regulations, disease prevention, and health promotion activities to maximize health of residents.

*Services:* (a) enforce state and local regulations related to the control and care of animals; (b) enforce the mandated state sanitary codes, including inspections and complaints; (c) provide social services to veterans, youth and families (seniors are served through the Council on Aging); and (d) investigate and monitor disease outbreaks, conduct flue vaccination clinics, provide health education, and participate in public health emergency preparation.

### Budget by Program

Program categories were restructured this year to better communicate the activities of the department. The largest share of time and budget is devoted to environmental health (inspections and complaints). Disease control is performed by a nurse shared through a collaboration with the town of Lexington (through a contract, not a Belmont employee).

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Animal Care & Control	1.00	20.4%	67,554	11.7%
Environmental Health	2.00	40.8%	226,526	39.1%
Youth & Family/Veterans	0.90	18.4%	159,511	27.5%
Disease Control	0.00	0.0%	41,490	7.2%
Administration	1.00	20.4%	83,212	14.4%
Other	0.00	0.0%	1,500	0.3%
<b>TOTAL</b>	<b>4.90</b>	<b>100.0%</b>	<b>579,793</b>	<b>100.0%</b>

## Expense Analysis

Line Item	FY2017	Prior Year	% Change	Explanation
Professional Services	\$0	\$53,201	-100.0%	Moved to new account lines (and moved household hazardous waste collection to DPW)
Public Health Nurse Services	\$34,090	\$0	-	New account line - previously included in professional services
Food Establishment Inspections	\$10,000	\$0	-	New account line - previously included in professional services (plus budget capacity reallocated from Vet Serv Recipient)
Flu Vaccine Purchases	\$5,000	\$0	-	Make up for state cuts to flu vaccine
Part Time Salaries	\$25,150	\$19,056	32.0%	Additional VSO hours to better comply with federal requirements
Vet Serv Recipient & Other Misc.	\$87,100	\$94,100	-7.4%	Reduced to match actual spending trends

## Requested Adds (not included in the budget above)

None.

## Special Analysis and Observations

The Health Department participates in numerous collaborations providing grants and programming, including mosquito control, tobacco prevention, substance abuse, emergency preparedness, and stress management. Additionally, through regionalization, we share a nurse with Lexington and a weights and measurements person with Arlington.

New veterans service officer has improved outreach to veterans, services, and programming. Additional hours and dedicated VSO put the town in better compliance with federal requirements.

New health initiatives (including hoarding and the opioid epidemic) made possible by contracting out routine inspection services.

Last year, Ebola preparedness was a big focus. Now keeping on eye on Zika virus. Flu clinics good preparation for emergency service delivery.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Explore the targeted use of inspection outsourcing (used by other towns, and show to be effective during FY2015 staffing shortage)	Implemented by shifting unused budget capacity from a different line item, which has made time for strategic health initiatives.

### FY 2017 Recommendations

Recommendation	Rationale
Explore joint communication of public health programming with other departments and community organizations	Could help residents become more aware of the breadth of available programming and expand utilization

## Library

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$2,192,584	\$65,118	3.06%	24.51

### Department Mission / Description of Services

*Mission:* Serve as a resource for equal and open access to information, ideas and technology to enrich the lives of all; provide services that address the diverse needs and interests of the citizens of Belmont; promote and support a strong sense of community.

*Services:* Curate resource collections; facilitate circulation of resources; provide reference and research support; sponsor programs; maintain public community spaces and meeting rooms; support life-long learning, including technology training; and, participate in larger networks such as the Minuteman Library Network.

### Budget by Program

The library provides services in five primary program areas: Circulation Services; Adult/Reference Services; Young Adult Services; Children's Services; and Technical/Processing Services.

The budget calls for an increase below the town average. There are no significant changes in the allocation across program areas.

The FY 2017 allocations are provided below. Public Services include the first four program areas noted above. When combined with Technical/Processing services, programming accounts for 86% of the FTEs and 77% of the total budget.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Public Services	17.81	72.6%	1,383,559	63.2%
Technical / Processing Services	3.40	13.9%	303,298	13.8%
Plant Operations	1.30	5.3%	307,875	14.0%
Administration	2.00	8.2%	197,852	9.0%
<b>TOTAL</b>	<b>24.51</b>	<b>100.0%</b>	<b>2,192,584</b>	<b>100.0%</b>

### Expense Analysis

The budget for the Children's Department is increased by \$28,278 to support the addition of a 15 hour (.43 FTE) Librarian and an 8 hour (.23 FTE) Library Assistant. With this allocation, the Children's Department will be open until 8 pm, Monday through Wednesdays, and there will also be additional support for school visits and curriculum development.

Utilities — comprised of Natural Gas, Water, and Electricity — increased by 5%, although less than \$5,000, based on rates provided by the town.

The library also plans to re-allocate \$1,076 in savings from removing the Library pay phone to increase professional training for staff, and is re-allocating \$4,345 in expiring ESCO Lease Payments towards energy conservation measures.

There were no line items that decreased by more than 5% and more than \$5,000.

### **Special Analysis and Observations**

None.

### **Recommendations**

#### **Recap of Prior Year Recommendations**

<b>Recommendation</b>	<b>Status</b>
Further develop planning efforts to address the maintenance and capital investment infrastructure.	Long-term planning has been completed and a feasibility study for the building is underway. The Long Range Planning Committee completed a 5 year long range plan in 2015, after which the Board of Trustees appointed a Feasibility Committee. The Library kicked off its Feasibility Study in early 2016 and appointed a subcommittee for the creation of an RFQ for architectural services, to consider a variety of options including improvements to the existing structure. The proposals are due in May with interviews to be conducted in June.
Ongoing attention to the use of benefited part-time positions	Over the last few years, the Library has reduced the number of part time staff members from three eligible employees to two eligible employees; only one of who is currently accepting benefits.
Develop additional management information and long-term plans for Digital Expansion	The Library continues to track a variety of metrics for use of digital services and will continue this effort in FY17.

### FY 2017 Recommendations

Recommendation	Rationale
Continue to implement planning efforts to address the maintenance and capital investment infrastructure.	The Warrant Committee recommends that the Library continue to engage in a productive dialogue in the town as the Feasibility Study is implemented. This could include engagement with the committee for the new high school, to explore whether there is any potential for coordination or sharing of resources, with the understanding that there are fundamental differences in these two capital related efforts.
Ongoing attention to the use of benefited part-time positions	The Warrant Committee continues to encourage town departments to recognize the total cost of employment, including benefits, and to consider benefit costs when making staffing decisions; particularly given the availability of subsidized, high quality health care under the Affordable Care Act and through the state's Health Connector.
Develop additional management information both to measure the continued increase in demand for Library Services that accounts for Digital Expansion, as well as support the need for targeted programming in response to specific areas of growing demand.	As digital expansion continues, management information to evaluate the demand and use of services can help town officials understand the ongoing importance of Library service and programming. The budget presentation includes a number of useful metrics to support these types of analyses and the Warrant Committee encourages Library staff to continue developing, monitoring, and explaining management information that will help to support the Library's current and proposed service levels.

## Public Safety

*Article 10 D: That under Public Safety, **\$13,334,736** be raised and appropriated.*

The Public Safety departments are the Police Department and the Fire Department. In addition to these two departments, the Public Safety appropriation includes \$24,341 for the Belmont Emergency Management Agency (BEMA), a mandated function responsible for planning, training, compliance and mitigation in relation to disaster planning and Homeland Security.

### Police Department

#### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$7,218,830	\$240,495	3.45%	112.00

#### Department Mission / Description of Services

*Mission:* The Police Department's primary responsibility is to protect and serve the Town residents.

*Services:* There are five primary services: 1) Police Patrol Services; 2) Traffic Management; 3) Detectives and Investigations; 4) Community Services; and, 5) Public Safety Communications.

#### Budget by Program

The FY17 Police Department budget calls for a 3.5% increase over FY16, following several years of flat budgets. Nearly 60% of the budget is allocated to Patrol Services, which provides 24/7 coverage of the Town. The next largest expense is Communications (13%), which handles emergency calls for both the Police and Fire Departments. Administration expenses, including records, account for 8.4%.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Patrol Services	35.00	40.7%	4,223,641	58.5%
Traffic Management	27.00	31.4%	597,802	8.3%
Detectives & Investigations	5.00	5.8%	460,175	6.4%
Community Services	4.00	4.7%	374,334	5.2%
Joint Public (911)	10.00	11.6%	957,442	13.3%
Administration	3.00	3.5%	511,792	7.1%
Records	2.00	2.3%	93,644	1.3%
<b>TOTAL</b>	<b>86.00</b>	<b>100.0%</b>	<b>7,218,830</b>	<b>100.0%</b>

Note: The department also employs 26 volunteer and per diem staff, for a total of 112 FTEs.



## Expense Analysis

Line Item	FY2017	Prior Year	% Change	Explanation
Furniture Expense	\$5,000	\$0	-	To begin the replacement of the Department's second hand furniture, which has been in place for 15 years
Computer Equipment Replacement	\$25,000	\$0	-	Replacement of network server (one-time expenditure)
Overtime	\$344,500	\$325,000	6.0%	Budgeting closer to actual; medical leave
Holiday Differential	\$111,550	\$105,395	5.8%	Reflects a swap of two officers between detectives and patrol, which is offset by decreases in corresponding accounts
Health Insurance	\$389,290	\$356,720	9.1%	Reflects a swap of two officers between detectives and patrol, which is offset by decreases in corresponding accounts
Education Incentive	\$42,500	\$24,000	77.1%	Education incentive pay to be earned by four patrol officers in the coming year
Prof Services-Emp Train Seminar	\$37,600	\$27,600	36.2%	Additional training to address topical issues such as use of force and training on the violation of civil rights
Firearms Training & Ammunition	\$25,000	\$0	-	Additional firearms training
Equipment Replacement	\$165,000	\$150,300	9.8%	There is an increase in the purchase price of patrol cars, which are budgeted to be replaced at a rate of one every 3 years
Part Time Salaries	\$257,470	\$230,177	11.9%	Includes a new part time parking control officer (\$27,293) to expand coverage; this position is expected generate revenue to offset a portion of the increase, but is primarily in response to demand from businesses and surrounding neighborhoods to enhance parking space turnover
Full Time Salaries	\$317,403	\$397,617	-20.2%	Reflects a swap of two officers
Health Insurance	\$54,865	\$65,140	-15.8%	Reflects a swap of two officers
Education Incentive	\$8,000	\$0	-	Education incentive pay to be earned by one detective in the coming year

Total personnel expenses are budgeted to increase 2.3%, within the Prop 2  $\frac{1}{2}$  cap.

**Requested Adds (not included in the budget above)**

None.

**Special Analysis and Observations**

*General* : Community policing is an increasingly complex engagement, influenced by the rise in opioid usage, widespread mental health issues and the perception of policing driven by incidents occurring elsewhere. The Belmont Police Department's proactive engagement in these issues and community based outreach is an asset of the town to be lauded.

*Communications Division* : The Department recently completed the renovation of the 911 communications space and upgraded its equipment to meet the mandated emergency medical dispatch protocols and quality control. The new enhanced system, funded primarily with a state grant, was supplemented by town funds approved in FY15 to provide new radios for the police and fire departments. Belmont's public safety dispatch received approximately 21,111 calls in FY15, including 1,029 emergency medical calls.

*Technology and Data Management* : During FY16, the Department was able to utilize an existing employee to assist in advancing the Department's use of technology and data management, resulting in significant time savings for the Department. Further development of customized management tools can provide additional efficiencies, more targeted deployment of assets, and support for achieving departmental goals.

*Staffing* : In addition to 48 sworn police officers, the Department oversees 38 additional communications, traffic safety, community service and administrative personnel, as well as 26 volunteers for a total of 112 departmental employees. The addition of a School Resource Officer, added in FY16, is considered a valuable and highly effective resource for the Town.

The consistent presence of multiple vacancies (three to five per year), many of which are unanticipated, suggests that the Department consider increasing the number of academy recruits in order to maintain more consistent staffing. Replacement officers require a lead of at least six months to hire and complete Academy training, resulting in longer vacancies and higher use of overtime.

*Regionalization* : The Police Department works closely with the surrounding towns and other relevant authorities through established groups around the issues of domestic violence, mental health, senior care and drug use. In the upcoming year, Chief McLaughlin will serve as the President of NEMLAC, a regional council that formalizes the provision of resources for emergencies requiring additional or specialized assets.

*Future Development* : In anticipation of future development at the Uplands and Cushing Square, an analysis of peer community police department metrics was performed by the Subcommittee and shared with Department administrators. This shows that the number of Belmont sworn officers is above towns with similar number of calls for service, crime levels and arrests. This is one indicator that suggests that Belmont may be able to absorb new development without adding FTEs. More complete analysis is required in order to evaluate the full impact of these developments on

departmental resources.

*Physical Plant* : As recognized by the Capital Budget Committee, the Department's building does not meet the needs of a 21st century police department. As an example, the department spends over one hour editing video from six cameras to meet the booking requirements of the court. During a week with multiple arrests, this can result in significant inefficiencies.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Deploy resources to a data analyst or business intelligence consultant	The Department utilized internal resources to enhance its use of technology

### FY 2017 Recommendations

Recommendation	Rationale
Consider outsourcing the customization of data reports to a software consultant familiar with QED and public safety	Advances made in the past year underscore the value of utilizing the technology and data available to the Department. With the departure of the in house resource, the use of an external resource is recommended.
Evaluate staffing models and "best practices" of comparable towns	In-depth analysis of peer community police departments can provide ideas, efficiencies and support for departmental goals.

## Fire Department

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$6,091,565	\$263,424	4.52%	55.49

### Department Mission / Description of Services

*Mission:* The Fire Department's primary responsibility is providing emergency response to Town residents.

*Services:* The Fire Department is divided in to the following functions: 1) fire suppression, which is acts to extinguish and prevent the spread of fires, including responding to calls where a fire is likely; 2) fire prevention; 3) providing rescue services to the Town; 4) service calls and 5) fire department administration.

### Budget by Program

Although the Fire Department is divided into five functions, the need to staff Fire Suppression 24/7 drives 84% of the FY17 budget and all of the non-administrative FTEs. These expenditures also cover ambulance, emergency and service calls, minor maintenance, and other tasks performed by the Fire Suppression personnel when not on fire calls. The Department recorded 2,868 incidents in calendar year 2015, of which 88 were fires and 1,296 were medical. The EMS portion of the budget includes supply and other non-personnel costs for ALS/BLS services.

After several flat budget years, the Department's FY17 budget increases 4.5% over FY16.

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Fire Administration	5.49	9.9%	779,414	12.8%
Fire Suppression	50.00	90.1%	5,114,851	84.0%
Rescue Services	0.00	0.0%	197,300	3.2%
TOTAL	55.49	100.0%	6,091,565	100.0%

### Expense Analysis

Line Item	FY2017	Prior Year	% Change	Explanation
Longevity	\$10,491	\$3,346	213.6%	Increase in participants
Health Insurance	\$54,865	\$38,580	42.2%	Different subscribers mix
Software Licenses	\$19,900	\$0	-	Annual licensing fee for the new Fire Records Management system
Equipment Replace- ment	\$76,475	\$0	-	A one-time expenditure for equipment related to the purchase of new Fire Records Management system
Professional Services	\$7,300	\$0	-	Annual testing of the turnout gear
Prof Services-Medical Bills	\$32,000	\$27,000	18.5%	Increase in physical exams due to anticipated turnover
Turn Out Gear Replace- ment	\$25,000	\$0	-	See discussion below
Equipment Replace- ment	\$25,000	\$18,000	38.9%	Adding mandated EMS IV pumps

Total personnel expenses are budgeted to increase 2.1% in FY17, within the Prop 2  $\frac{1}{2}$  cap.

**Requested Adds (not included in the budget above)**

<b>Request</b>	<b>Explanation</b>
ALS Coordinator: The Department has requested a full time ALS coordinator to oversee and expand ALS service.	<p>Since FY14, the Advanced Life Support (ALS) level of ambulance service instituted by the Department in FY14 has resulted in an enhanced service to residents, without adding additional FTEs. After initial significant increases in revenues in FY14 and FY15, revenues in FY16 are budgeted to decrease by 8% in FY16 due to a loss of back up business from Watertown, and increase minimally in FY17. The Department handled 963 ambulance transports in calendar year 2015, 563 of which were ALS (58%).</p> <p>For FY17, budgeted line item expenses specific to ALS total almost \$150,000, not including base salaries and benefits, billing expenses, gas and maintenance or allocated expenses. ALS stipends have increased by 13% in the last two years, while ALS transports and ambulance revenues have been flat. Further analysis of the incremental cost/benefit associated the addition of an ALS coordinator are necessary to support this request.</p>
Technology and Data Management: The Department is requesting a $\frac{1}{2}$ FTE data analyst position and dedicated public safety information IT support of 10-20 hours per week.	<p>In FY17, the Department will expend almost \$100,000 to replace its 15 year old record management system and related equipment with a new public safety package, which is expected to result in more immediate, accurate, complete and paperless information through the use of on-site hardware and user friendly interfaces. The new system provides an opportunity to create efficiencies and effective management tools through customized data reports and compatibility with other systems. Given the specialization of the system, rapid changes in software and the front-loaded initial needs, it is recommended that the Department outsource the customization to software consultants familiar with the system and with public safety data management. Using a system specific consultant should prove more cost effective than an in house hire or IT generalist.</p>

**Special Analysis and Observations**

*Strategic Planning Process* : In anticipation of administrative turnover, the Department has proactively created a strategic planning committee, consisting of a broad cross-section of the Department, to review and formalize policies and procedures. This effort is a critical step in managing transition in the face of the loss of institutional knowledge as senior administrators retire.

*Turnout Gear* : The Department has budgeted \$50,000 (\$25,000 out of the capital budget and \$25,000 from the General Fund) to replace 20 sets of turnout gear (originally purchased through a grant) and \$7,300 for turnout gear testing and cleaning. New guidelines recommend two sets of gear per firefighter so that gear can be cleaned of contaminants after each use. Hereafter, the Department expects to budget \$25,000 per year (10 sets), with the goal of replacing two sets of gear per firefighter every 10 years. An additional \$7,300 per annum has been added to the budget for testing equipment each year to ensure safety and prolong use.

*Staffing* : The Department FTE count is driven by the need to staff 24/7 the required number of personnel to man resident equipment for a potential fire emergency. Belmont staffs 13 per shift, with a minimum of 11 for two engine pumps and one ladder truck. The personnel also respond to EMS calls, conduct service calls and perform in service inspections and routine maintenance. The NFPA recommends 17 per shift; however, an analysis of comparable towns shows that surrounding communities and communities similar to Belmont also do not adhere to this guideline.

To the extent that there are vacancies, injuries or other absences, the Department uses overtime to ensure necessary equipment coverage. The Department works hard to anticipate staffing changes and manage overtime; however, hiring and training a firefighter takes at least one year, often resulting in a lag between the onset of a vacancy and replacement. A SAFER grant, received in FY15 to fund the hiring and training of two firefighters, temporarily increased the departmental FTEs in anticipation of turnover; these firefighters will be able to be absorbed into the budget when the grant runs out in FY17 and expected retirements occur.

*Administrative Turnover* : As has been noted in the past several years, the Fire Department anticipates the retirement of senior administrators in the next 12-18 months, including the Chief and Assistant Chief. This will be a significant loss of institutional knowledge and leadership and the administration has been proactively working to ensure a smooth transition.

This critical juncture in the Department's history begs a review of "best practices" around management structure, responsibilities, tasks and duties, given the changes in technology and firefighting that have occurred in the past several decades.

As an example, we note that only one other comparable town has a Deputy/Assistant Chief position. This community, Wellesley, has a significantly higher daytime population than Belmont as well as several college student populations, resulting in 25-30% higher emergency responses and medical assists. Understanding how peer communities operate may provide opportunities for improved efficiencies in Belmont.

*Future Development* : In anticipation of new development at the Uplands and in Cushing Square, an analysis of comparable towns' fire departments was performed by the Subcommittee and shared with Fire Department administrators. This shows that Belmont's Fire Department FTEs are above the average for towns with similar numbers of emergency responses and medical assists. This initial analysis is one indicator that suggests increased activity from new development can be absorbed without increases in FTEs. More complete analysis is required to evaluate the full impact of these two projects on Departmental resources.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Evaluate and address succession of leadership	The Department instituted an internal Strategic Planning Committee to review and formalize policies and procedures.
Evaluate staffing models and "best practices" of comparable towns	The Department has reviewed data collected by the Public Safety Subcommittee regarding staffing models for comparable towns.

### FY 2017 Recommendations

Recommendation	Rationale
Expand strategic planning process to include non-departmental stakeholders and resources	The inclusion of non-departmental resources ensures that the goals and priorities of the Department are coordinated with town wide strategic efforts.
Consider outsourcing the development and customization of data management tools	An IT consultant from the new systems provider or an outside consultant who works with public safety data management may be a more cost efficient and knowledgeable source than an in-house hire given the unique server and specialized needs of the Department and rapid changes in technology.
Evaluate tasks performed by senior administrators to determine opportunities for restructuring or consolidating non-core duties	Changes in technology and firefighting have impacted the day to day administration and management of public safety. The near-term turnover in FD administration provides an opportunity to restructure duties and provide opportunities for mid-level team members.
Analyze the impact of adding an ALS coordinator	Information to support the Department's request to add an ALS coordinator requires a detailed analysis of historical BLS/ALS revenues and expenses, projected revenue and all in expenses expected to be generated with the addition, and information on positions in comparable towns.

*As noted in the Public Safety introduction on page 25, the Public Safety appropriation also includes \$24,341 for the Belmont Emergency Management Agency (BEMA).*



## Public Services

*Article 10 G: That under Public Services, \$13,093,626 be raised and appropriated.*

Public Services includes the Departments of Public Works (which includes the Recreation Department), Community Development, and Facilities. These departments are discussed separately below.

### Public Works

#### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$7,714,817	\$357,068	4.85%	65.70

Note: Above \$ figures exclude water and sewer enterprise accounts, however, said figures are shown below in this report

#### Department Mission / Description of Services

*Mission and Services:* The Department of Public Works (DPW) provides a wide variety of key Town services including street and sidewalk maintenance, snow removal, vehicle fleet maintenance, forestry, grounds and delta maintenance, solid waste collection and disposal, street lighting, parks and playing fields maintenance, cemetery maintenance, water and sewer maintenance and construction. In 2013 the Recreation Department was consolidated into Public Works.

Recreation provides Belmont residents with healthy, enjoyable and affordable activities regardless of age, gender or physical ability. Offerings include Summer Underwood and Higginbottom Pool Programs, Summer Sports and Activity Programs, School Year Programs, Skating Rink Programs, Spring Programs and Special Needs Programming.

#### Budget by Program

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Administration	3.00	4.6%	334,541	1.4%
Street Maintenance	5.00	7.6%	719,543	3.0%
Snow Removal	0.00	0.0%	733,135	3.1%
Central Fleet Maintenance	4.00	6.1%	590,205	2.5%
Forestry	1.00	1.5%	288,711	1.2%
Delta & Grounds	1.00	1.5%	75,522	0.3%
Solid Waste Collection & Disposal	1.50	2.3%	2,610,016	11.2%
Street Lighting	0.00	0.0%	348,495	1.5%
Cemetery Maintenance	5.70	8.7%	502,791	2.1%
Parks & Facilities Maintenance	5.30	8.0%	612,776	2.9%
Recreation	14.80	22.5%	899,082	3.8%
<b>General Fund Subtotal</b>	<b>41.30</b>	<b>62.9%</b>	<b>\$7,714,817</b>	<b>32.6%</b>

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Water Administration	2.00	3.0%	692,368	2.9%
Water Distribution	10.40	15.9%	6,115,550	25.8%
Sewer Maintenance	8.00	12.2%	8,699,458	36.7%
Stormwater Maintenance	4.00	6.1%	475,629	2.0%
<b>Enterprise Subtotal</b>	<b>24.40</b>	<b>37.1%</b>	<b>\$15,983,005</b>	<b>67.46%</b>
<b>DEPARTMENT TOTAL</b>	<b>65.70</b>	<b>100.0%</b>	<b>\$23,697,822</b>	<b>100.0%</b>

### Expense Analysis

The following budget line items changed by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

<b>Line Item</b>	<b>FY2017</b>	<b>Prior Year</b>	<b>% Change</b>	<b>Explanation</b>
Public Works Supplies	\$388,430	\$337,180	15.2%	Road salt price increase
Street Lighting	\$348,495	\$331,900	5.0%	Increased utility costs
Part Time Salaries	\$32,004	\$26,413	21.2%	Contract increase
Trash Contract Collec- tion	\$1,156,578	\$1,074,145	7.7%	Contract increase under new 2 year bridge contract, plan RFP for new trash contract
Recycling	\$404,664	\$376,285	7.5%	Conduct audit of trash and recycling, recycling coordinator, state recycling drop-off center
Leaf and Yard Waste	\$341,856	\$317,532	7.7%	Contract increase
Hazardous Waste	\$12,000	\$0	-	Taking over hazmats from Health Dept.
Health Insurance	\$65,140	\$38,580	68.8%	Change in two insureds' status to family plans
Part Time Salaries Camps Programs	\$125,185	\$118,665	5.5%	Minimum wage increase, life guards for new pool

### Requested Adds (not included in the budget above)

None.

### Special Analysis and Observations

The department is constrained to work within the available revenue budget. However, an available revenue budget does not allow for additional investment to maintain Town infrastructure.

The Summer of 2016 will be the first full-year operation of the new Underwood Pool, and costs and revenues are estimated for FY17.

As we have noted in the past, the Skip Vigliolo Skating Rink is past its useful life. The deteriorating condition of the DPW yard facilities also needs to be addressed. These assets may fail with little warning.

A two year bridge contract for solid waste disposal was entered into in 2016 due to high solid waste disposal prices, and low demand for purchasing recyclables, in the open market. This will allow the marketplace to stabilize, hopefully, when a new contract is put out for bid in two years, as well as to allow sufficient time for the Town to receive information and comment from the public as part of the process.

A new Recreation Director position is being planned, but the cost for same is not in the FY17 budget.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Increase recycling percentage.	Recycling coordinator will explore further education/outreach, and a recycling and hazardous waste drop-off site will be created. Belmont saves approximately \$65 for each ton diverted from regular trash to recycling stream.
Resolve disposition of incinerator site.	Funds have been set aside for this purpose. The post-closure use of the site must be chosen and implemented once the purchase price for the site has been determined by the state, which should be in 2016.
Continue to evaluate Recreation operating as a self-supporting entity.	Expanded programming can generate revenues to cover operating expenses, maintenance, and capital costs. Programs are being expanded, the Underwood Pool schedule is being changed. A Recreation Strategic Plan is in process and expected to be completed in 2016.
Develop new programming across all age groups for new Underwood Pool. Identify new revenue sources.	Additional pool and expanded usage present an opportunity to increase revenues to cover Recreation costs. This is being implemented.
Collaborate with the School Dept. regarding operating Higginbottom and Underwood Pools under an Aquatics Director.	Maximizing the use of both indoor and outdoor pools through additional programming and rentals could justify hiring an experienced aquatics director and teacher. This issue is being explored.
Develop relationships with other, self-supporting Recreation Departments.	Increases efficiency and identifies additional successful programming. This issue has been discussed and identified in the ongoing Recreation Strategic Plan.
Expand programming to utilize available space/facilities.	Programming for preschool and adults and other groups can generate revenues during the daytime hours. This is part of the ongoing Recreation Strategic Plan work.

### FY 2017 Recommendations

Recommendation	Rationale
Check quality of sidewalks and other concrete work in the Town.	There have been instances of poor quality concrete in various locations.

## Community Development

### Budget Overview

FY 2017	\$ change from prior year	% change from prior year	FY 2017 FTEs
\$1,055,293	\$90,000	9.32%	9.97

### Department Mission / Description of Services

*Mission and Services:* There are four departments:

- **Administration** – administers and monitors requests for proposals, grants, contracts, and reimbursements.
- **Inspection Services** – issues building permits and conducts building inspections, also responsible for code enforcement. Plumbing and gas inspector is a shared position with the Town of Watertown.
- **Engineering** – responsible for the development, design, and oversight of road reconstruction and major sanitary sewer and storm drain rehabilitation projects.
- **Planning** – provides services and guidance on land use and related issues to the Board of Selectmen, Town Administrator, Town boards, residents, and developers.

### Budget by Program

Program	FTEs	FTE %	Budget \$	Budget %
Administration	3.63	36.4%	171,935	16.3%
Engineering	1.34	13.4%	266,545	25.3%
Inspection/Enforcement*	2.00	20.1%	349,788	33.1%
Planning	3.00	30.1%	267,025	25.3%
<b>TOTAL</b>	<b>9.97</b>	<b>100.0%</b>	<b>1,055,293</b>	<b>100.0%</b>
* includes \$82,000 plumbing and gas inspector shared with Watertown				

### Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses.

Line Item	FY2017	Prior Year	% Change	Explanation
Full Time Salaries	\$197,360	\$138,028	43.0%	New staff planner position
Health Insurance	\$28,305	\$16,285	73.8%	Coverage for new position
Rock Meadow Maint.	\$7,000	\$0	-	Manage Rock Meadow

**Requested Adds (not included in the budget or discussed by Board of Selectmen above)**

None.

**Special Analysis and Observations**

A new planning staff position is being added because there is currently only one staff planner, and the work is becoming too much for one person to perform.

**Recommendations****Recap of Prior Year Recommendations**

<b>Recommendation</b>	<b>Status</b>
None	Department is running well

**FY 2017 Recommendations**

<b>Recommendation</b>	<b>Rationale</b>
Allow for online permit filing	Could lead to efficiency and easier tracking of permits. Already implemented for plumbing, gas and electrical permits.
Track repeat offenders of snow shoveling bylaw	This would ensure that those sidewalks are shoveled.
Track and eliminate illegal stormwater and sump pump hookups into the sewer system	Would help mitigate stormwater infiltration into sewer system.

## Facilities

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$4,323,516	\$2,718,193	169.32%	28.55*

\*This includes 18.5 Facility FTE's still shown in the School Budget, and 1.25 Facility FTE's still shown in the Library Budget.

### Department Mission / Description of Services

In September 2013 the consolidation of the Town and School building maintenance departments into a single department was accomplished with the hiring of a new Director of Facilities. In 2016, the School Facility Operations and Maintenance Accounts were consolidated into the Facilities Department's budget, which accounts for the large increase shown for FY17. In this report, the Town building services will be shown with a comparison to the previous year's Town-only figures, but the Department's totals will be shown as consolidated.

*Mission and Services:* The new combined Facilities department is responsible for the maintenance, cleaning, repair of all Town and School buildings, including managing the fuel and utilities for said buildings. The department also assists with the oversight of Town and School capital projects.

### Budget by Program

The combined budget both Town and School buildings broken down by function in dollar amount and percentage is as follows:

<b>Program</b>	<b>FTEs</b>	<b>FTE %</b>	<b>Budget \$</b>	<b>Budget %</b>
Personnel & Admin	1.30	4.7%	641,920	14.8%
General Services	0.00	0.0%	165,177	3.8%
Utilities	0.00	0.0%	1,890,537	43.8%
Building Maintenance	26.40	92.4%	604,991	14.0%
Supplies and Equipment	0.00	0.0%	725,891	16.8%
Major Building Repairs	0.85	2.9%	295,000	6.8%
<b>TOTAL</b>	<b>28.55</b>	<b>100.0%</b>	<b>4,323,516</b>	<b>100.0%</b>

## Expense Analysis

The following budget line items increased by more than 5% and by more than \$5,000 from 2016 Estimated Expenses. As most of the increases in this Department's budget are due to bringing in the School Department's facilities budget and FTE's, this report will not identify those changes in detail.

Line Item	FY2017	Prior Year	% Change	Explanation
School utilities, supplies and equipment	\$3,788,236	\$3,543,757	6.9%	Cuts from FY15 to FY16 which are being put back due to the override

## Requested Adds (not included in the budget above)

None.

## Special Analysis and Observations

Having combined the Town, School and (partly) the Library Facilities Departments, there is a greater economy of scale in ordering supplies and parts; and for the Town and School Departments in prioritizing capital projects. While the combined Facilities Department manages the Library's 1.25 FTE maintenance staff, it does not yet control the Library's facilities budget or capital projects.

A facilities audit found about \$14 million dollars in trade costs alone for repairs to the current buildings in Town, such as school building envelopes and boiler replacements. Chipping away at these repairs will take a long time.

## Recommendations

### Recap of Prior Year Recommendations

Recommendation	Status
Include the Library Facilities Department within the consolidated Department	This has been partly completed, but not for capital projects and the budget.
Combine School security with the Town's security	The Schools currently use a vendor, while the Town uses the Police Department. This is being explored.

### FY 2017 Recommendations

Recommendation	Rationale
Same as the above for FY16	Same as the above for FY16



## Minuteman

Article 10 F: That under Minuteman Regional School, **\$795,654** be raised and appropriated.

### Budget Overview

FY 2017	\$ change from prior year	% change from prior year	FY 2017 FTEs
\$795,654	\$(35,866)	(4.31%)	-

The District budget decreased 0.52% primarily because of a reduction in enrollment. It would have been a larger decrease except for budgeted debt service related to the first year of the proposed new building. Belmont's assessment decreased 4.31% primarily because its enrollment was down from 31 to 26 students. The fiscal year 2017 budget and assessment is under the new revised District agreement that includes a rolling average to determine enrollment and a different capital allocation formula. The effect of the new agreement on Belmont this year was negligible.

### Department Mission / Description of Services

*Mission:* Minuteman's mission is to serve a diverse student body with multiple learning styles within academic, career, and technical areas.

*Services:* Minuteman provides instruction to high school students in traditional academic subjects and 19 career and technical training areas, such as carpentry, plumbing, culinary arts, early education, telecommunications, biotechnology, environmental science, and computer programming/web design. Minuteman also provides career and technical training to postgraduate students, although the costs for the post-graduate programs are primarily covered through a separate budget.

### Budget by Program

Minuteman's major program areas are shown below. Instructional support includes services such as special education, technology support, guidance, the library, and health.

Program	Budget FY 2017	Difference from FY 2016	Percent Change
Administration	\$1,739,885	\$(5,454)	-0.03%
Student Instructional Services	\$9,626,521	\$(373,977)	-0.37%
Student Services	\$2,240,048	\$115,967	-5.4%
Operation & Maintenance	\$1,803,804	\$(29,291)	-1.6%
Insurance, Retirement, Leases	\$2,913,565	\$26,630	1.0%
Community Services	\$100,000	\$0	0.0%
Asset Acquisition & Improvement	\$157,322	\$(433,651)	7.3%
Debt Service	\$1,116,952	\$596,870	114.7%
Tuition Payments	\$30,000	\$0	0.0%
TOTAL	\$19,728,097	\$(102,906)	0.52%

## **Special Analysis and Observations**

*Enrollment Trends* : The current total enrollment at Minuteman is comprised of 624 high school students, down from 673 students the previous year. As discussed below, with the adoption of a new Regional District Agreement, six towns will be exiting from the district. The enrollment from the 10 remaining towns is 331 students, or approximately 53% of the total enrollment. Belmont currently has 26 high school students attending Minuteman.

*Non-Member Tuition Students* : Out-of-district students pay a tuition which is set by the state Department of Elementary and Secondary Education (DESE). Presently, the out-of-district tuitions pay less than the total per-pupil cost for each member town. However, the out-of-district towns must provide their own transportation (while transportation is provided for the in-district students) and must also pay a surcharge for special education students, both of which help reduce the disparity somewhat.

## **District's Present and Future**

For the past several years, the Minuteman Regional Vocational District has been struggling with a number of problems, which include: (i) declining enrollment from member towns; (ii) an outdated and unfair governance structure; (iii) an aging building in need of repairs or replacement; and (iv) a State mandated funding environment financially favorable to non-member towns.

During the past year with the adoption of a new Regional District Amended Agreement, the governance has been significantly improved with, among other changes: (i) weighted voting; (ii) flexibility that may be inviting to proposed membership by other towns; and (iii) a mechanism to seek non-member towns pay their fair share. Also, there has been some changes in the State funding regulations that recognizes in certain circumstances non-member towns should be responsible for a share of the capital costs of regional vocational school districts.

As of the time of this writing, the likelihood of success of the District's proposed new school is very much in doubt. The District School Committee voted approval of approximately \$144.9 million debt authorization to fund a new school with a planned enrollment of 628 students. The District proceeded under the statutory procedure that required the unanimous approval of all 16 member towns. On May 4, 2016, the Belmont Town Meeting voted disapproval of the funding by a vote of 141-81. All other towns are support the debt, either by not voting or by voting approval subject to a successful debt exclusion. In any event, with Belmont's disapproval vote, the District's funding for a new school is in jeopardy.

It is now incumbent upon the District to present a plan to the Massachusetts School Building Authority suggesting how the District believes they can secure the requisite funding. The District could seek, as a statutory alternative, a District-wide ballot vote, though the early indication is that the Administration will not choose this path.

If the proposed new school building project is defeated and abandoned, Belmont and the remaining nine towns will have to deal with the problem of the aging building, but hopefully with a re-constituted District including membership of previous non-member towns that sent a substantial number of students to Minuteman. Much work will be required if such reconstitution is to occur.

## Belmont Public Schools

*Article 10 E: That under Belmont Public Schools, **\$50,126,583** be raised and appropriated.*

### Budget Overview

<b>FY 2017</b>	<b>\$ change from prior year</b>	<b>% change from prior year</b>	<b>FY 2017 FTEs</b>
\$50,126,583	\$466,513	0.94%	477.3

### Department Mission / Description of Services

The School Department, responsible for K-12 education of all Belmont children and also for pre-kindergarten services to children with special needs, is Belmont's largest department. In addition to its core classroom education, it provides Belmont students with a wide array of athletic, cultural, and service opportunities. The School Department also manages an adult education program and recreation programs open to both children and adults.

### Budget by Funding Sources and Program Categories

Three types of revenues support the formal school budget. In addition to the appropriation from the General Fund, grants and revolving fund revenues are important sources of funds:

<b>Funding Source</b>	<b>FTEs</b>	<b>FTEs %</b>	<b>Budget \$</b>	<b>Budget %</b>
General Fund	477.3	90.5%	50,126,583	88.4%
Grants	15.6	3.0%	3,432,132	6.1%
Revolving Funds	34.4	6.5%	3,118,233	5.5%
<b>TOTAL</b>	<b>527.3</b>	<b>100.0%</b>	<b>\$56,676,948</b>	<b>100.0%</b>

The school budget expense accounts are organized under six major programs:

<b>Program Category</b>	<b>FTEs</b>	<b>FTEs %</b>	<b>Budget \$</b>	<b>Budget %</b>
Regular Instruction	268.9	51.0%	21,161,912	37.3%
Special Instruction	128.9	24.4%	16,391,126	28.9%
Student & Instructional Services	69.6	13.2%	7,616,026	13.4%
Operations	18.4	3.5%	1,138,543	2.0%
Leadership & Administration	41.5	7.9%	3,327,672	5.9%
Allowances & Benefits	0.0	0.0%	7,041,669	12.4%
<b>TOTAL</b>	<b>527.3</b>	<b>100.0%</b>	<b>\$56,676,948</b>	<b>100.0%</b>

## Program Services and Support

Another useful way to look at the budget items is to group them by service and support categories, and to compare against last year's budget. (The last column shows % change from FY16 to FY17).

		FTE FY16	Budget FY16	FTE FY17	Budget FY17	% Δ\$
	DIRECT EDUCATIONAL SERVICES					
1	Regular Instruction	265.9	20,685,084	268.9	21,201,912	2.5%
2	SPED Instruction	103.7	6,403,672	105.4	6,778,918	5.9%
3	Substitutes	0.0	475,000	0.0	480,000	1.1%
4	SPED Out-of-District Tuitions	0.0	5,909,232	0.0	7,058,872	19.5%
5	English Language Learners	8.6	649,805	9.4	650,134	0.1%
6	Pre K	14.8	766,510	14.0	774,724	1.1%
7	Adult Education	0.0	19,120	0.0	9,120	-52.3%
8	Benefits Allocation	0.0	3,862,430	0.0	4,027,736	4.3%
		393.0	38,770,853	397.8	40,981,417	5.7%
	STUDENT SERVICES					
9	Athletics	1.0	833,473	1.0	850,725	2.1%
10	Student Activities	0.2	106,122	0.2	140,627	32.5%
11	Guidance	11.0	861,940	12.3	998,933	15.9%
12	Psychological Services	6.8	529,164	6.8	551,240	4.2%
13	Health Services	7.9	640,412	8.1	687,015	7.3%
14	Library	5.9	272,275	6.2	289,480	6.3%
15	METCO	5.8	360,386	5.3	338,507	-6.1%
16	Benefits Allocation	0.0	380,887	0.0	405,128	6.4%
		38.8	3,984,658	40.0	4,261,654	7.0%
	EDUCATION SUPPORT					
17	Curriculum Development	1.7	196,625	1.7	233,303	18.7%
18	Staff Development	1.0	248,800	1.0	270,667	8.8%
19	Benefits Allocation	0.0	26,535	0.0	27,340	3.0%
		2.7	471,960	2.7	531,310	12.6%
	ADMINISTRATION & OPERATIONS SUPPORT					
20	Building Administration	31.7	2,105,078	31.3	2,167,103	2.9%
21	Central Administration	9.2	1,221,942	10.2	1,308,913	7.1%
22	Operations	18.5*	1,198,169*	18.5	1,138,543	1.0%
23	Technology	10.5	1,284,093	10.0	1,328,775	3.5%
24	Food Service	16.8	762,001	16.9	843,675	10.7%
25	In-District Transportation	0.0	340,000	0.0	441,800	29.9%
26	SPED Transportation	0.0	1,044,800	0.0	1,128,477	8.0%
27	METCO Transportation	0.0	152,160	0.0	152,160	0.0%
28	Health Insurance for Retirees	0.0	1,444,057	0.0	1,497,381	3.7%
29	Benefits Allocation	0.0	867,761	0.0	895,739	3.2%
		86.7*	10,420,061*	86.9	10,902,566	4.6%
	TOTAL ALL CATEGORIES	521.2*	53,647,532*	527.3	56,676,948	5.6%

\*excludes \$2,425,408 and 1.6 FTE, reflecting budget lines moved to Town in FY17

In this table we see several significant changes in budget allocations from FY16 to FY17:

**SPED ("SPecial EDucation") Classroom Instruction (line 2):** The FY17 budget is 5.2% and \$375,246 greater than the FY16 allocation, and the total staffing FTE count increases from 103.7 to 105.4. The net addition of 1.7 staff reflects a gain of 4.5 teacher FTEs and a decrease of 2.8 aide FTEs, which reflects an approach of providing more SPED services in-house as a way to manage demand for out-of-district services.

**SPED Out-of-District Tuitions (line 4):** The FY17 budget is 19.5% and \$1.15 million greater than the FY16 allocation. The school department estimates that for FY16 the actual costs for this item will exceed the budget by \$700,000. The FY17 allocation equals the expected FY16 total actual costs with a 7% growth factor taken from the 2015 Financial Task Force model.

**SPED Out-of-District Transportation (line 26):** The FY17 budget is 8.0% and \$83,677 greater than the FY16 allocation, and for several years the costs have risen significantly faster than the number of students transported.

(All Special Education ("SPED") expenses are examined further starting on page 50.)

**Direct Educational Services (lines 1-8):** Classroom staff is higher in the FY17 budget by a total of 4.8 FTEs. The additional positions were envisioned in the 2015 Financial Task Force Report and made possible by the successful operating override vote.

**Guidance (line 11):** The FY17 budget adds a full-time guidance FTE at the High School and part-time (0.35 FTE) position at the Middle School.

**In-District Transportation (line 25):** The \$101,800 increase has two components. First, actual costs in FY15 and FY16 have been about \$40,000 more than budgeted, and the FY17 reflects the higher expenses. Second, the district plans to add a seventh bus in FY17 and estimates the extra cost at \$64,800. The revenue from user fees is expected to stay flat at \$200,000; the additional \$101,800 is allocated from General Funds, and the FY17 General Funds allocation for in-district transportation is 73% more than the FY16 amount.

**Central Administration (line 21):** Within this item, a new addition is a part-time registrar to handle registrations at the central office instead of at each school.

**Operations (line 22):** FY17 is the first year where the Town's Facilities Department is responsible for much of the operations of the school buildings. In this transition \$2,529,417 has left the school budget. (The allocation of the \$2.5 million is 60% utilities expenses, 22% buildings and grounds, and 18% custodial services.) The table on page 45 adjusts the FY16 numbers as if these same budget lines had been transferred to the Town in FY16, in order to have an "apples-to-apples" comparison with the FY16 budget.

## Funding Sources

The spending categories shown on the previous page are financed through three types of revenues: General Funds, State and Federal Grants, and Revolving Funds, summarized in this table:

Funding Source	FY 2017	Description
Chapter 70 State Aid for Education	7,096,024	The final amount available will not be known until the state budget is approved
Other General Fund Sources	43,030,559	This is 53% of available tax proceeds and other revenue, after fixed costs and Chapter 70 aid
<i>ALL GENERAL FUND SOURCES:</i>	50,126,583	The amount to be appropriated by Town Meeting
<hr/>		
"Circuit Breaker"	1,413,257	State grant that partially reimburses high cost SPED tuition expenses
Individual with Disabilities Education Act (IDEA)	912,022	The primary federal grant to help fund special education
Early Education and Care (EEC)	28,050	Support for Pre-K SPED programs
SPED Improvement	12,480	State grant program development
METCO program & transportation	517,750	State grant for METCO
Full Day Kindergarten	126,069	State support for full day kindergarten
Title I	253,525	Federal grant to promote literacy through wellness
Title IIA	73,396	Federal grant, professional development
Title III	60,583	Federal grant to support English Language Learners (ELL)
Grant from Town	35,000	Payment from Town for tech support
<i>ALL GRANTS:</i>	3,432,132	
<hr/>		
Full Day Kindergarten	723,013	Fees for afternoon session
Pre-Kindergarten	141,649	Participant fees
Lunch programs	883,675	Intended to cover full costs
BHS and CMS Athletics	502,431	Participant fees
Bus transportation	200,000	Covers less than half of costs
Building Rental Fees	205,215	Pays for building expenses
Other User Fees	462,250	Seven other funds
<i>ALL REVOLVING FUNDS:</i>	3,118,233	

This table does not include funds received from other organizations, such as the Foundation for Belmont Education, the PTOs, the "Friends of ..." fundraising groups, local businesses and other organizations that provide grants and program support independently of the School Department budget.

## **Enrollment and Staffing Trends**

The table on the next page presents annual data on enrollment, staffing, and total spending during the ten year period from FY06 to the present; it also subdivides this period in two: (a) the six years from 2006 to 2012; and, (b) the four years from 2012 to 2016. During the latter four year period enrollment increased much faster than during the earlier six year period. Summary growth data are provided for each of these periods. Four trends stand out:

**Rising Enrollments** Long-term enrollment has grown 18.6% since 2006, an annualized rate of 1.7%. Looking at the two component periods, the growth rate from 2006 to 2012 was only 1.2% per year, while in the four years since 2012, the annualized growth rate essentially doubled to 2.5%, representing a net increase of about 400 students.

**Increased Staffing** Due in part to the increased staffing afforded by last year's override, increases in teaching staff have generally kept pace with enrollment growth. During the two sub-periods, the annualized growth rates for all classroom staff were 3.1% and 2.5% respectively. However, the growth in the 2006-2012 period was dominated by a significant increase in the use of instructional aides, which grew at a rate 14.2% per year, while growth in teachers during this period was 1.0%. In the four years since 2012, the annualized growth rates for teachers and aides have been more similar, at 2.0% and 4.0% respectively.

**Relatively Stable Student-Teacher Ratios** Student-teacher ratios reflect these growth rates. In FY16, the ratio for Regular Instruction programs is 16.5, down from a high of 16.8 in FY15. Special instruction has a lower ratio and is now below 10, reflecting recent increases in staffing.

**Robust Budget Growth** The 2015 override allowed for a growth rate of 7.6% in the General Fund portion school budget from FY15 to FY16 (i.e., from \$46.156 million to \$49.660 million). Since 2006, the annualized growth rate has been 4.2% for the General Fund budget.

**Future Enrollment Projections:** In preparing its FY17 budget, the School Department is projecting an enrollment increase of about 100 students and is adding approximately five new teaching positions to maintain existing student-teacher ratios. Going forward, the school district will be reviewing and updating its enrollment forecasts as it prepares submissions related to the high school building project. Its current estimate is that the October 2019 enrollment will be 4705 (i.e., up from 4303 in October 2015), in part due to newly developed housing and continued residential demand in Belmont by parents with school-aged children. Enrollment growth will significantly influence future financial constraints on the district.

# Long-Term Growth in Enrollment, Staffing, and Budget (Grades K-12)

								Growth: 2006-2012						Growth: 2012-2016		Growth: 2006-2016	
	2006 (Actuals)	2007 (Actuals)	2008 (Actuals)	2009 (Actuals)	2010 (Actuals)	2011 (Actuals)	2012 (Actuals)	Total	CAGR	2013 (Actuals)	2014 (Actuals)	2015 (Actuals)	2016 (Actuals)	Total	CAGR	Growth	CAGR
<b>Enrollment</b>																	
K-12 Enrollment (in District)	3,628	3,676	3,708	3,790	3,905	3,877	3,900	7.50%	1.21%	3,994	4,136	4,222	4,303	10.33%	2.49%	18.61%	1.72%
Regular Instruction	3,233	3,257	3,315	3,432	3,581	3,599	3,624	12.09%	1.92%	3,713	3,845	3,932	4,002	10.42%	2.51%	23.77%	2.16%
Special Education	395	419	393	358	324	278	276	-30.09%	-5.79%	281	291	290	301	9.19%	2.22%	-23.67%	-2.66%
<b>Staffing</b>																	
<b>Classroom Teachers</b>	238.90	235.90	240.35	245.67	244.70	253.01	253.02	5.91%	0.96%	257.93	262.80	262.80	274.40	8.45%	2.05%	14.86%	1.40%
Regular Instruction	218.84	216.79	220.24	223.98	221.95	226.90	225.93	3.24%	0.53%	230.85	234.65	233.59	242.54	7.35%	1.79%	10.83%	1.03%
Special Instruction	20.06	19.11	20.11	21.69	22.75	26.11	27.08	35.03%	5.13%	27.08	28.15	29.21	31.86	17.63%	4.14%	58.83%	4.74%
<b>Instructional Aides/Tutors</b>	33.84	37.03	42.57	45.81	45.46	80.58	75.02	121.70%	14.19%	81.16	86.29	88.35	87.60	16.76%	3.95%	158.87%	9.98%
Regular Instruction	2.85	2.79	2.74	7.11	2.99	19.84	26.16	817.39%	44.69%	28.88	18.67	20.74	21.93	-16.17%	-4.31%	669.07%	22.63%
Special Instruction	30.99	34.24	39.83	38.70	42.47	60.75	48.86	57.68%	7.89%	52.27	67.62	67.61	65.67	34.39%	7.67%	111.91%	7.80%
<b>All Classroom Staff</b>	272.74	272.93	282.92	291.48	290.16	333.59	328.04	20.28%	3.12%	339.09	349.09	351.15	362.00	10.35%	2.49%	32.73%	2.87%
Regular Instruction	221.69	219.58	222.99	231.09	224.94	246.74	252.09	13.71%	2.16%	259.73	253.32	254.33	264.47	4.91%	1.21%	19.30%	1.78%
Special Instruction	51.05	53.35	59.93	60.39	65.22	86.85	75.95	48.78%	6.85%	79.36	95.77	96.82	97.53	28.42%	6.45%	91.06%	6.69%
<b>All Department Staff</b>	390.82	392.33	403.65	412.28	409.64	471.62	469.20	20.06%	3.09%	478.61	492.50	495.97	507.36	8.13%	1.97%	29.82%	2.64%
<b>Student-Staffing Ratios</b>																	
<b>Student-Teacher</b>	15.19	15.58	15.43	15.43	15.96	15.32	15.41			15.48	15.74	16.07	15.68				
Regular Instruction	14.77	15.02	15.05	15.32	16.13	15.86	16.04			16.08	16.39	16.83	16.50				
Special Instruction	19.68	21.92	19.55	16.50	14.24	10.65	10.19			10.38	10.34	9.93	9.46				
<b>Student-All Classroom Staff</b>	13.30	13.47	13.11	13.00	13.46	11.62	11.89			11.78	11.85	12.02	11.89				
Regular Instruction	14.58	14.83	14.87	14.85	15.92	14.59	14.38			14.30	15.18	15.46	15.13				
Special Instruction	7.73	7.85	6.56	5.93	4.97	3.20	3.63			3.54	3.04	3.00	3.09				
<b>Student-Department Staff</b>	9.28	9.37	9.19	9.19	9.53	8.22	8.31			8.34	8.40	8.51	8.48				
<b>Budgets (millions)</b>																	
General Fund Only	\$33.005	\$34.869	\$37.040	\$38.471	\$37.824	\$39.703	\$39.703	20.29%	3.13%	\$43.068	\$44.549	\$46.156	\$49.660	25.08%	5.75%	50.46%	4.17%
All Funding	\$34.589	\$36.580	\$38.915	\$40.885	\$42.311	\$44.225	\$44.225	27.86%	4.18%	\$49.273	\$50.715	\$52.482	\$56.073	26.79%	6.11%	62.11%	4.95%

**Notes:**

Enrollment, staffing, and budget totals for FY06-10 are taken from Annual Reports.

Totals for FY11-16 are taken from School Department Enrollment Reports and budget documents (actual FTEs, budgeted dollars)

The staffing and budget totals for FY2010 and FY2011 reflect ARRA and SFSF Grant funding. For years prior to FY2011, however, only General Fund and Revolving Account funding is included; no data found for other grant funding. It is likely staffing counts (eg., in Special Instruction) are also missing.

All enrollment counts exclude Special Education out-of-district placements.

Because ELL students are in both the regular education and special education student populations, ELL teachers and tutors are distributed proportionally across the regular and special instruction staffing counts.

The 60 FTE increase in total staffing indicated in FY2011 appears to reflect both an increase in the classroom staffing included in this table (+41 FTEs), plus the inclusion of 15.5 cafeteria staff who were not included in the FY2006-FY2010 Annual Reports.

Enrollment and staffing totals are for Grades K-12 only (excluding Pre-K), however, budget totals include all grades.

The FY14 budget amounts reflect the addition of \$200,000 from a Reserve Fund Transfer, as well as the removal of \$190,000 in LABBB credits (the latter were moved to the FY15 Revolving Account budget)

The FY15 budget amounts do not include the addition of \$250,000 in Special Education Stabilization Fund monies and \$285,000 from a Reserve Fund Transfer.



## Special Analysis

The following sections look at two key drivers of school budget growth: providing special education services, and compensation costs.

### Key Driver: Providing Special Education Services

Federal and state laws mandate that public school districts educate all students and provide special education services as needed. As of March 2016, there are 454 Belmont students (about 10% of the student population) identified with disabilities and receiving special education services. Of these students, 401 students are in grades K through 12; the other 53 are either receiving early education and care services or are receiving services up until age 22.

Of the K-12 population, almost 80% receive services that supplement the education they receive as included members in the regular education classrooms. The other special education students receive their education in separate classrooms offered by a variety of providers.

The total budget for special education services (including Pre-K) for FY17 is more than \$15 million, or more than 26% of the total school budget from all funding sources. As this table of special education program categories shows, the annual growth rate of the total special education budget over the past five years has been 8.1%, making it one of the fastest growing components of the school budget.

Special Education Program	(\$ in thousands)					
	ACT-13	ACT-14	ACT-15	BUD-16	BUD-17	CAGR*
Pre-K	590	361	556	560	633	1.8%
Classroom K-12	3,383	3,708	3,929	4,326	4,601	8.0%
District-Wide Services	865	1,015	1,172	1,195	1,277	10.2%
District-Wide Admin & Support	435	433	401	447	466	1.8%
Home and Summer Tutoring	344	416	342	435	435	6.0%
Out-of-District (OOD) Tuitions	5,096	4,948	5,937	5,909	7,059	8.5%
OOD Transportation	693	856	956	1,045	1,128	13.0%
TOTAL	\$11,406	\$11,736	\$13,292	\$13,918	\$15,599	8.1%

\*compound annual growth rate

### *SPED in the classroom*

This table compares the recent history of students, classroom FTEs, and total salary costs for those involved with special education services within the regular classroom setting in grades K-12. Note that SPED classroom FTEs have been increasing faster than SPED students, primarily through increasing the number of aides in the regular instruction classrooms.

	<b>ACT-13</b>	<b>ACT-14</b>	<b>ACT-15</b>	<b>BUD-16</b>	<b>BUD-17</b>	<b>CAGR</b>
SPED inclusion students	281	291	290	301	307*	2.2%
SPED classroom FTEs						
Teacher & Occ Therap FTEs	28.6	28.5	30.4	31.4	35.9	5.8%
Aide FTEs	50.4	53.9	67.0	67.4	64.6	6.4%
Total FTEs	79.0	82.4	97.4	98.8	100.5	6.2%
Classroom salary costs ('000s)	\$3,766	\$4,191	\$4,448	\$4,818	\$5,128	8.0%
Classroom salary per student	\$13,401	\$14,401	\$15,339	\$16,006	\$16,704	5.7%

\*estimate

### *Out-of-District Placements*

Not all students receiving special education services receive them directly from district teachers and aides. The current estimate is that 101 students in FY17 will attend "out-of-district" classrooms provided by other entities. This cohort has added students each year since FY13, growing at an annualized rate of 6.0%. Since out-of-district tuitions are significantly higher than the per student costs for those who stay within the district, the growth of out-of-district placements has created financial challenges for the district.

The LABBB Collaborative supports the largest number of Belmont's out-of-district students. LABBB is a provider of a diverse program of special education services and classrooms, organized by the Lexington, Arlington, Burlington, Bedford, and Belmont school districts, and the five member districts provide classroom space and other facilities for the LABBB community.

Another category of out-of-district placements are students in collaborative programs (other than LABBB) and in other Massachusetts public school districts. As a "non-member" participant, the Belmont school district has no direct say in how these programs are run.

The third broad category contains student placements in privately run schools. While privately run, the state regulates how these schools operate and what tuition levels they may charge. As the table below shows, these programs are the most expensive in the special education budget, as they serve students with the greatest needs (including residential placements).

	ACT-13	ACT-14	ACT-15	BUD-16	BUD-17	CAGR
<b>LABBB</b>						
Enrollment	33	33	41	42	44*	7.5%
Total cost in thousands	\$1,692	\$1,768	\$1,973	\$2,091	\$2,611	11.5%
Cost per student	\$51,272	\$53,571	\$48,113	\$49,785	\$59,347	3.7%
<b>Collaboratives &amp; MA Public</b>						
Enrollment	9	11	16	16	16*	15.5%
Total cost in thousands	\$530	\$687	\$920	\$612	\$904	14.3%
Cost per student	\$58,904	\$62,421	\$57,481	\$38,247	\$56,473	-1.0%
<b>Private Placements</b>						
Enrollment	38	39	36	40	41*	1.9%
Total cost in thousands	\$2,874	\$2,494	\$3,044	\$3,206	\$3,544	5.4%
Cost per student	\$75,642	\$63,941	\$84,564	\$80,157	\$86,440	3.4%
<b>TOTAL TUITIONS</b>						
Enrollment	80	83	93	98	101*	6.0%
Total cost in thousands	\$5,096	\$4,948	\$5,937	\$5,909	\$7,059	8.5%
Cost per student	\$63,706	\$59,616	\$63,835	\$60,298	\$69,890	2.3%

\*estimate based on current cohort

#### **Out-of-District Transportation**

Students transported (est)	80	83	93	98	101	6.0%
Total cost in thousands	\$693	\$856	\$956	\$1,045	\$1,128	13.0%
Cost per student	\$8,658	\$10,308	\$10,284	\$10,661	\$11,173	6.6%

We offer several comments on this table and the challenge of funding out-of-district placements.

First, remember from the earlier discussion of SPED Out-of-District Tuitions on page 46 that the actual FY16 costs for these items are about \$700,000 above the FY16 budgeted amounts.

Second, growth in the out-of-district student cohort and the variability in the services required by these students has led to a significant overall long-term increase in costs. It is not clear what the school administration can do to control total cost of out-of-district placements or the services required.

Third, with the average cost per out-of-district placement approaching \$70,000, the potential budget impact of a growing out-of-district placement cohort is significant to the overall school budget.

Fourth, there are significant increases in out-of-district costs per student in the FY17 budget that warrant close attention. In particular, the reasons for the FY17 increase in the average LABBB tuition and the out-of-district transportation cost need to be fully understood.

Finally, the preceding describes the gross cost of out-of-district placements to the Belmont school district. However, the net costs to the district are lower. As the Funding Sources table on page 47 shows, the district receives significant state and federal grants to help pay for out-of-district placements. For instance, the state's Circuit Breaker grants provide partial reimbursement for

SPED tuition expenses when a student's tuition exceeds about \$40,000. In FY16 Belmont will receive \$1,413,257 in circuit breaker tuition reimbursements from claims for 71 student tuitions paid in FY15.

Given the lag in reimbursement funding and the recent rise in placements, the FY17 budgeted total of \$2.3 million in state Circuit Breaker and federal IDEA grants is likely to be a conservative estimate of the amounts to be received in FY17, and the actual amounts could be several hundred thousand dollars higher. To the extent that these grants are indeed higher and actual out-of-district expenses are close to the budgeted amounts, the district would be able to carry over the extra grant funds as a cushion for unexpected SPED costs in future years.

### Key Driver: Compensation

In Belmont, salary costs make up 61% of the FY17 school budget, and, including benefits and other compensation related costs, the total is 72%, or \$42.8 million. The large share highlights the role of compensation as a driver of the overall budget. This table shows how these costs have grown over the past five years, with total compensation costs growing 5% over that time:

	<b>ACT-13</b>	<b>ACT-14</b>	<b>ACT-15</b>	<b>BUD-16</b>	<b>BUD-17</b>	<b>CAGR</b>
FTEs	485.4	490.0	506.8	522.8	528.9	2.2%
Salaries* (in '000s)	\$30,392	\$32,503	\$33,447	\$36,088	\$37,392	5.3%
Fringe Benefits** (in '000s)	\$4,741	\$4,790	\$4,839	\$5,157	\$5,376	3.2%
<b>TOTAL (in '000s)</b>	<b>\$35,133</b>	<b>\$37,292</b>	<b>\$38,286</b>	<b>\$41,246</b>	<b>\$42,768</b>	<b>5.0%</b>

\*includes stipends, contract allowances for raises, and substitutes

\*\*does not include retiree health insurance

### Historical Salary Totals By Job Title

The following table shows the historical growth in total salary costs, total FTEs, and average salary costs per FTE for various position categories recognized in the budget. The lunch staff and aides were excluded. A few other personnel accounts were excluded due to some classification ambiguities.

## SELECTED JOB CATEGORIES

### Total Salary Costs By Category (\$ in thousands)

	ACT-13	ACT-14	ACT-15	BUD-16	BUD-17	CAGR
Teachers	18,518	19,755	20,570	22,349	23,116	5.7%
Other Unit A	2,262	2,496	2,633	2,721	2,929	6.7%
Aides	1,887	2,388	2,287	2,598	2,594	8.3%
Leadership	2,874	2,817	2,895	2,942	3,054	1.5%
Clerical	1,150	1,209	1,190	1,201	1,308	3.3%
Technology	354	379	439	430	445	5.9%
Custodial	570	589	564	603	631	2.6%
Building and Grounds	314	366	405	411	372	4.3%
TOTAL SALARY COSTS (in '000s)	\$27,930	\$29,999	\$30,982	\$33,254	\$34,448	5.4%

### FTEs

	ACT-13	ACT-14	ACT-15	BUD-16	BUD-17	CAGR
Teachers	257.9	261.5	266.3	279.9	286.8	2.7%
Other Unit A	35.3	34.1	35.1	34.7	35.9	0.4%
Aides	73.9	88.8	99.4	100.8	98.9	7.6%
Leadership	24.4	24.1	24.4	24.4	24.4	0.0%
Clerical	26.6	26.2	26.4	26.4	27.1	0.5%
Technology	7.5	7.5	7.5	8.0	7.5	0.0%
Custodial	13.0	13.0	13.0	13.0	13.5	0.9%
Building and Grounds	6.5	6.6	7.1	7.1	6.6	0.6%
TOTAL FTEs	445.1	461.8	479.1	494.3	500.7	3.0%

### Average Salary Per FTE (\$)

	ACT-13	ACT-14	ACT-15	BUD-16	BUD-17	CAGR
Teachers	71,792	75,559	77,255	79,845	80,600	2.9%
Other Unit A	64,035	73,130	74,940	78,349	81,517	6.2%
Aides	25,534	26,881	23,020	25,768	26,218	0.7%
Leadership	117,791	116,868	118,633	120,565	125,159	1.5%
Clerical	43,279	46,188	45,089	45,511	48,272	2.8%
Technology	47,207	50,568	58,398	53,719	59,386	5.9%
Custodial	43,843	45,270	43,373	46,374	46,711	1.6%
Building and Grounds	48,716	55,504	57,007	57,939	56,353	3.7%
AVERAGE SALARY PER FTE	\$62,749	\$64,961	\$64,660	\$67,270	\$68,794	2.3%

As shown in the first panel, total salary costs for the accounts considered here rose an average of 5.4% per year since FY13, due to both rising headcount and rising salaries. The second and third panels unpacks this annualized growth rate, attributing 3.0% to growth in FTEs district wide and 2.3% to growth in average salary levels.

For payroll and other purposes, employees belong to one of eight groups, five of which have a union that exclusively represents them in collective bargaining and other interactions with the school committee and administration. Union contracts are usually negotiated to cover a three year period. FY17 is the final year of the current contracts for the five unions representing Belmont school employees, and negotiations for the next round of contracts are expected to begin in the fall of 2017.

#### *Structure of Unit A Salaries*

Unit A, the union bargaining unit for teachers, guidance counselors, librarians, nurses, and occupational therapists, accounts for 60% of the FTEs and 74% of the salary compensation in the FY17 school budget. The current Unit A contract agreement provides for a guaranteed increase of a teacher's base salary for the first fourteen years, as the teacher "steps" up the table, and teachers with more than 14 years experience receive longevity based increases. In addition, a teacher will automatically receive additional permanent increases for completing graduate level course work of the teacher's choosing (thus moving across "lanes" in the compensation table).

It is useful to take a look at the actual experience in FY15 and FY16 staffing to better understand the various impacts of contractual salary progression, staff turnover, and changes in funded positions. The following two tables use actual payroll data from FY15 and FY16.

The first table looks at the impact of the step-and-lane structure through the experience of the Unit A employees who were employed at the same FTE level in both FY15 and FY16. This group consists of 260 people accounting for a total of 254.7 FTEs:

#### **IMPACT of STEP-AND-LANE on UNIT A SALARY INCREASES, FY15 to FY16**

<b>FY15 ⇒ FY16</b>	<b>FTE</b>	<b>FY-15</b>	<b>FY-16</b>	<b>Δ%</b>	<b>average FY16 salary</b>
<b>SAME LANE</b>					
Step up	141.5	9,865,875	10,416,627	5.6%	73,616
Top step	71.0	6,624,742	6,723,656	1.5%	94,699
Top step, longevity up	5.0	475,017	488,719	2.9%	97,744
Repeat step	8.0	579,847	584,962	0.9%	73,120
<b>CHANGE LANE</b>					
Step up	26.6	1,833,998	1,987,489	8.4%	74,718
Top step	2.6	244,600	254,883	4.2%	98,032
<b>TOTAL</b>	<b>254.7</b>	<b>\$19,624,079</b>	<b>\$20,456,337</b>	<b>4.2%</b>	<b>\$80,315</b>

Among those who stayed in the same degree lane, the ones who moved up one step received an average salary increase of 5.6%. Those who were already at the top step (step 14) received 1.5%, bringing their average salary to \$94,699. A few at the top step also received a longevity increase, awarded for every five years at the top step, for an average increase of 2.9% to \$97,744. Eight FTEs were on the FY16 payroll at the same step due to leaves of absence.

Among those who changed lanes by receiving additional course credits, those who also moved up one step received an 8.4% raise. Those already at the top step received an average of a 4.2% raise.

Overall the total salary for the 260 Unit A employees who were in the system in both FY15 and FY16 rose 4.2% from FY15 to FY16, and the average FY16 salary for this group was \$80,315.

The second table shows the total salaries of those who departed the district after FY15 and who joined in FY16. The departing employees numbered 46, representing 42.7 FTEs. The average step for these employees was 9.2, and 25 of the 42 were in the "master's plus 15 hours" lane or higher. In contrast, the new employees, numbering 63 and representing 54.1 FTEs, entered at an average step of 5.7. While 57 of the 63 new hires had a master's degree, 47 of the new hires were in a degree lane below the "master's plus 15 hours". In short, the departing teachers were replaced with new hires with lower salaries on average:

**IMPACT of TURNOVER on UNIT A SALARY COSTS, FY15 to FY16**

<b>FY15 ⇒ FY16</b>	<b>FTE</b>	<b>FY-15</b>	<b>FY-16</b>	<b>average salary</b>	
Departing employees	42.7	\$3,223,219	0	\$75,485	(FY15)
New hires	54.1	0	\$3,454,958	\$63,862	(FY16)

The experience from FY15 to FY16 is typical — the district usually brings in new hires at a lower step and lane than the retiring or exiting teachers.

Because the FY16 budget was based on an assumption that the FY15 FTEs would be staffed at levels one step higher across the board (except, of course, for those employees already at the top step), the experience of staff turnover and replacement with staff entering at lower steps led to the actual staff costs being lower than budgeted. For FY16, the difference in average salary of \$11,623 per FTE, times the 42.7 FTEs of the departing teachers, creates a surplus of actual to budget of almost \$500,000.

### Looking Ahead

In April 2015 the voters approved a \$4.5 million operating override, and the FY16 and FY17 school budgets reflect this increased funding with larger special education budgets and higher staffing levels. For now, the requested school budget "fits" within the overall available revenues. How long this remains the case will of course depend upon the growth of future school budgets relative to available revenues.

## Recommendations

**Explain Special Education Expenses** The total budget for special education services is more than \$15 million and it has been growing at a compound annual rate of more than 8% since 2013. This committee looks forward to working with Superintendent Phelan and the district leadership to better understand the financial workings of the various special education programs. Three particular topics are:

- *LABBB Finances.* The governing board of the LABBB Collaborative includes the superintendents of the five member towns, and the per student costs are projected to rise significantly in FY17.
- *Other Out-of-District Placements.* The number of placements and the level of required services greatly affect these total costs. The ability to plan and prepare for future surprises in total out-of-district placements will be enhanced when we can better distinguish between systematically rising trends and year-to-year fluctuations around a long-term average.
- *District-wide SPED Services.* About \$1 million in the FY17 budget is for district-wide special education services, notably services provided by outside contractors. As described in last year's report, more precise classification of the invoices as they are paid could bring more insight through the existing financial reporting system.

**Study Enrollment Trends and Projections** The future path of enrollment will influence the severity of future financial constraints on the district. The current basis for predicting future enrollment can be improved through a more extensive analysis of the various factors that drive enrollment. Lexington and Arlington have recently completed similar studies, and they can serve as examples of what could be done here.

**Consider the Impact of Contract Negotiations** The final topic is not so much a recommendation as it is counsel to the entire community to understand the importance of the upcoming contract negotiations between the school leadership and the five unions in determining whether or not subsequent school budgets can be funded through available revenues, or whether budget reductions, or higher taxes through a new override, or both will be needed.



# BELMONT PUBLIC SCHOOLS

FY17 Budget (July 1, 2016–June 30, 2017)



## **BELMONT SCHOOL COMMITTEE**

Lisa Fiore, *Chair*  
Susan Burgess-Cox, *Secretary*  
Elyse Shuster  
Tom Caputo  
Murat Bicer  
Andrea Prestwich

## **SCHOOL ADMINISTRATION**

John P. Phelan, *Superintendent*  
Janice Darias, *Assistant Superintendent*  
Anthony DiCologero, *Director of Finance,  
Business, and Operations*

## **TO THE CITIZENS OF BELMONT AND TOWN MEETINGS MEMBERS**

The School Department is appreciative and thankful to have benefited in FY16 from the increase in funding, as a result of the Proposition 2 ½ Override passed by the Town of Belmont in April 2015. This needed increase in funding supported several lines in our budget including: 10 FTE teaching positions, funds for Students Services, Out of District Tuitions, and Special Education Transportation.

This increase in funding for FY16 put the district in the position to fully realize budget lines that supported teaching and learning, including the purchases of text, materials and supplies that have been historically frozen and reduced mid-year.

As we use our FY16 budget to inform our FY17 budget planning, it is clear that the district needed to utilize a zero-based budgeting process with each school and department. This process required every department director and school principal to meet with the Central Office administration to justify each salary and non-salary budget line amount for FY17.

The purpose of these meetings and the budgeting goal of the district is to allocate our funds toward the priorities of the School Department's Strategic Plan.

In FY16 the district implemented Year 1 of the 3 Year Fiscal Plan that was outlined in the Financial Task Force budget. The pressure points of increasing enrollment and subsequent space challenges continue to be a high priority. In FY16 the district was able to hire 10 FTEs to combat higher class size and provide additional courses for Chenery and Belmont High School to reduce the number of non-scheduled and non-engaged students. In FY16 the district was able to create five additional classroom spaces for teaching and learning. Two spaces were repurposed at Chenery and Butler. Additionally, the high school moved into three modular spaces located behind the building.

In FY17 the district will implement Year 2 of the 3 Year Fiscal Plan that will bring 5 FTEs to support the reduction of class size and enrollment concerns. The school district formed a Space Task Force to analyze the enrollment and space issues. The recommendation of this group was to expand the high school footprint to the three additional modular spaces. These modular structures remain from previous building projects, and with some attention and maintenance, are suitable for classroom use. At the elementary level the district will repurpose a computer lab and after school program space into instructional space. For the Chenery, in May Town Meeting approved the funding of 6 modular classrooms to increase instructional space as the building is over capacity. The result is an increase of 11 classrooms throughout the district in response to growing enrollment challenges.

The School Department has been working diligently to operate within the current budget appropriation for FY16. The one line item of note that continues to represent a challenge is Out of District Tuition. Due to several high tuition cases the line is forecasted to be over spent by approximately \$700,000. The district has been vigilant in all aspects of budget and has put in place measures to reallocate funds to fill this gap. As of the FY16 Quarter 3 Update the district is projecting an aggregate short fall of approximately \$21,000. The district will continue to address this projected deficit during the remainder of the year with the expectation of balancing the budget by the end of the fiscal year.

Per discussion with the Town Administrator the district will utilize an anticipated increase in state funding as well as the reallocation of funds within the forecasted FY17 budget. The additional funds projected in state revenue will go directly toward the Out of District line. The

School Department reviewed the Financial Task Force Year 2 budget and reallocated funds to prioritized lines in the budget; the details of which are outlined in this document.

In conclusion, the School Department will utilize its Strategic Plan to guide and prioritize the allocation of its budget dollars. We have embarked on a zero based budgeting process to ensure that every dollar is expended with efficiency and effectiveness. These funds will be allocated toward the goal of providing our students, staff, families, and community the best education experience that the Town of Belmont expects and deserves.

Respectfully submitted,

John P. Phelan  
Superintendent of Schools

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- IV FY17 Budget Details

## **BELMONT PUBLIC SCHOOLS GOALS**

With a commitment to teaching and learning, the Belmont Public Schools strive to nurture the intellectual, social, and personal development of each student and to create a dynamic community of lifelong learners who contribute to the common good and are of service to others.

To support this mission, the Belmont Public Schools has identified the following three goals:

1. To prepare all students for college, career, and life-long learning through a balanced and healthy school experience, and through continuity of curriculum and compliance with Commonwealth and community standards, through support for educators to experiment and innovate, and clear articulation of our instructional models.
2. To support continuous improvement and overall programmatic and fiscal stability by engaging administrators, teachers, and other stakeholders in generally accepted practices of long-term strategic planning.
3. To ensure that students receive instruction from consistently highly qualified educators who pursue continuous improvement of their art by hiring well-prepared and diverse professionals, and sustaining continuous professional development by means of clear and coherent plans, and by implementing a successful educator evaluation system in line with new Commonwealth standards.

### **Historic Fiscal Pressure Points/Context**

Over the last several years, the Belmont Public Schools has been seeing increasing enrollment that over time has created budget concerns. The enrollment in the schools has grown by 398 students since October 1, 2009 and is projected to grow to over 4,705 students by October 1, 2019 (see Chart # 1 on next page). Two emerging sub groups within this aggregate population increase are students who are still learning the English language (ELLs) and students on Individual Education Plans (IEPs) who have services provided for them at specialized schools outside of Belmont.

Specialized services for both of these groups are mandated by the Commonwealth of Massachusetts. The ELL student population has grown dramatically from 95 students in 2010 to 261 students in 2016 (see Chart #2). This increased number of students requires the hiring of additional teachers with specialized training to work with students in small groups.

In Chart #4 you can see the increase in our Out of District (OOD) student population. The services that we provide to our students outside the district come with tuition costs and transportation costs.

The School Department is appreciative and thankful to have benefited in FY16 from the increase in funding, as a result of the Proposition 2 ½ Override passed by the Town of Belmont in April 2015. This needed increase in funding supported several lines in our budget including: 10 FTE teaching positions, funds for Students Services, Out of District Tuitions, and Special Education Transportation.

This increase in funding for FY16 put the district in the position to fully realize budget lines that supported teaching and learning, including the purchases of text, materials and supplies that have been historically frozen and reduced mid-year.

**Pressure Point #1 - Enrollment:  
Aggregate Increase over 5 Year Period & Projection over the next 5 Year Period**

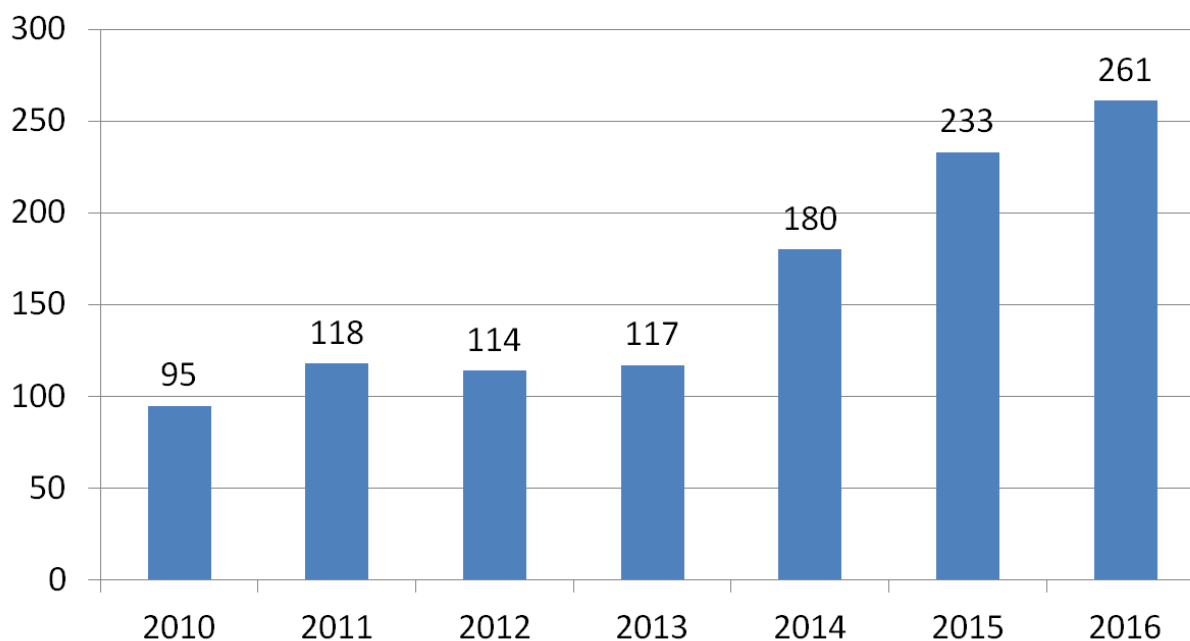
**Chart #1**

	Oct. 1, 2009	Oct. 1, 2010	Oct. 1, 2011	Oct. 1, 2012	Oct. 1, 2013	Oct. 1, 2014	Oct. 1, 2015	Oct. 1, 2019
BPS K-12 Enrollment	3905	3877	3900	3994	4136	4222	4303	**4705
Difference, year to year		-28	23	94	142	86	81	
			Difference, 2009 to 2015				398	**402
			Difference, 2009 to 2019					**800

Enrollment Projections based on NESDEC Plus 30 Index with Uplands and Cushing Square taken into consideration \*\*

**Pressure Point # 1 - ENROLLMENT:  
Emerging Sub Group Populations - ELL Enrollment, FY10-FY16  
Chart # 2**

**ELL Students**

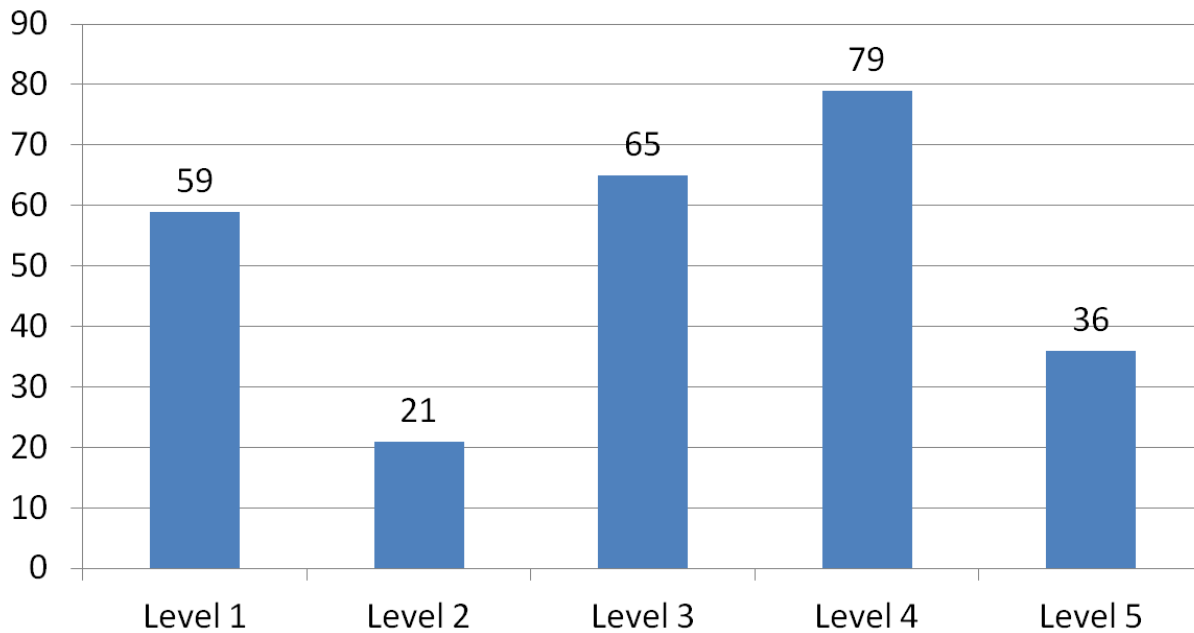


Note that since this information was compiled as of December, 2015, As of May 15, the district ELL population has increased to 289 students.

## English Proficiency Levels – FY16

Chart # 3

### English Proficiency Levels



### Out of District (OOD) 2012 through April 2016

Chart #4

Year	June, 2012	June, 2013	June, 2014	June, 2015	April 1, 2016
# of OOD Students	91	81	87	97	101

#### Financial Impact:

- The average cost per OOD pupil is approximately \$65,000 per student inclusive of transportation
- The average range of the cost per OOD pupil is from \$50,000 - \$150,000 per student, inclusive of transportation

## **FY17 Budget Overview**

The School Department participated in the Financial Task Force Committee (FTF) in an attempt to find ways to take a long view of our fiscal stability. The FTF reviewed the last five years of spending and budgeting for the Town (and schools) and began the process of projecting the Town's expenditures and revenue over the next three to five years. This process was very helpful to the schools as it was the mechanism for putting together a Three Year Fiscal Plan. The FY17 Budget represents year two of this plan and it includes five additional FTEs to support growing enrollment and student needs.

Included in Chart # 1a is detail listing of the positions planned to be added to the School Department in accordance with the three year FTF plan. As actual student enrollments and instructional needs have unfolded over the course of FY16, with implications for FY17, revisions to this plan have been necessary. In order to provide transparency, Chart # 1b is included to show these revisions. Additionally, Chart # 2 offers the rationale and benefit for each of these additional positions.

- Budget Assessment
- FY17 Budget – BPS Three Year Fiscal Plan (Charts #1a & 1b)
- Year Two New Position Breakdown by Level (Chart # 2)



# **Budget Assessment**

## **FY17 SCHOOL DEPARTMENT INITIATIVES**

- Implementation of year two of the three year budget plan of the Financial Task Force Committee budget to address class size issues, to engage students in educationally beneficial programming and reduce the amount of students in study halls at Chenery and in the hallways and library at Belmont High School
- Continued review of class sizes and control of elementary assignments with planning for projected enrollment increases
- Continue utilizing/adding additional classroom space at all levels:
  - Reallocation of space at the Burbank Elementary School for classrooms
  - Addition of six modular classrooms on the campus of the Chenery Middle School
  - Commissioning of three additional (existing) modular classrooms at Belmont High School
- Deployment of the increase in Student Services funding from the FY17 budget to address mandated costs; simultaneously review and improve the budget tracking systems in these areas
- Expansion of iPad instructional models 1:1 at BHS
- Professional development focus areas preK-12: technology tools and applications to improve instruction, teaching English Language Learners, shared inquiry circles to develop critical thinking skills, social emotional learning to improve the district's capacity to engage and support all learners
- Full implementation of new educator appraisal system, including implementation of District Determined Measures for Student Impact Rating through the Evaluation Advisory Team
- Upgrade of the fire alarm system at Belmont High School, in consultation with the Town Fire and Facilities Departments.
- Cooperate with, and support the work of, the Belmont High School Building Committee, during the Eligibility Period of a potential building project for Belmont High School in conjunction with the Massachusetts School Building Authority (MSBA).

## **FY17 BUDGET OBJECTIVES**

- Maintain rigorous and high quality of instruction and student engagement for all students
- Maintain the staffing levels commensurate to the increase in enrollment needed to maintain the existing quality of educational services to our students
- Maintain the well-rounded education comprised of rigorous academics, strong performing arts, high participation in athletics, extra-curricular experiences, and community service
- Sustain continued implementation of Educator Evaluation System
- Provide mandatory Sheltered English Immersion training for teachers
- Meet existing contractual commitments
- Maintain and support the continuous improvement of our staff through professional development
- To the extent possible, address increasing class sizes and program offerings
- Maintain existing facilities and avoid deferred maintenance
- Maintain competitive compensation to attract and retain high quality teachers and administrators

## **TECHNICAL BUDGET ASSUMPTIONS**

- School Budget per Financial Task Force Committee Budget with successful Override Funds is \$50,126,583, which reflects the migration of \$2.5 million in School Department facilities line items to the consolidated Town Facilities Department.
- Funding for Special Education out of district tuitions, contract services and transportation at projected FY16 cost levels, plus Task Force annual index factor of 7%: \$1,165,000 increase over FY16 Budget.
- Busing: \$102,000 increase over FY16 Budget to contract for one additional bus to support ridership participation and to resolve operating deficit.
- Health insurance premiums reflect a 2.5% increase over FY16 rates.
- Increase in legal costs for FY17 contract negotiations by \$47,000 over FY16 Budget.
- Grant Funds budget remains the same as FY 2016; concerns remain as to whether the State fully funds grants such as Full Day Kindergarten, Title II, and Circuit Breaker etc.
- Athletic program will continue to be funded 40% from the General Fund, 60% from user fees and gate receipts.
- Roll forward all existing positions; and add 5.0 FTEs as recommended in year 2 of the Financial Task Force Committee Budget.

## **PRIMARY COST DRIVERS**

- Increase in enrollment with corresponding increase in staff (5.0 FTE's); enrollment is expected to increase by an estimated 100 students in FY17
- Student enrollment increasing markedly; predicted four year increase (FY17-FY20) of another 402 students – bringing the ten year period from October 2009-October 2019 to over 800 additional students to the district
- Mandated costs for both Special Education and ELL services have escalated over a number of years, resulting in budget deficits during the school year
  - Additional funding budgeted in FY17 based on FY16 “actual expenditure” amounts in mandated services for out of district tuitions
- Contractual salary obligations (2/3rds of the budget)

## **UNKNOWN VARIABLES**

- Further increases in student enrollment, and the cost of the corresponding additional student supports needed, especially in the areas of ELL and Special Education
- Increases or decreases in State and Federal Grants (Full Day Kindergarten, Circuit Breaker Reimbursement, Title I, Title IIA, etc.) have not been finalized for FY17
- Potential legal costs related to collective bargaining beyond what has been budgeted

## WHAT DID THE OVERRIDE PROVIDE

### FY16 Budget – BPS Three Year Fiscal Plan – Additional Staffing Chart #1a – Original Plan

Level	Year One (2015-2016)	Year Two (2016-2017)	Year Three (2017-2018)
Elementary	1.0 Grade 4 Teacher 1.0 Kindergarten Teacher 1.0 Grade 1 Teacher	1.0 Grade 2 Teacher	1.0 Grade 3 Teacher
Middle	1.0 Grade 5 Teacher 1.0 Unified Arts Teacher	1.0 Unified Arts Teacher 1.0 Guidance Counselor	
High	3.0 FTEs for reduction of the non-engaged/non-scheduled students	1.0 FTE for reduction of the non-engaged/non-scheduled students 1.0 Guidance Counselor	1.0 FTE for reduction of the non-engaged/non-scheduled students
District-wide	2.0 English Language Learner Teachers		1.0 Technology Staff 1.0 Instructional Technology Specialist 1.0 SEL Staff Person
Total FTE Count	10	5	5

### Chart #1b – Updated Plan

Level	Year One (2015-2016)	Year Two (2016-2017)	Year Three (2017-2018)
Elementary	1.0 Grade 4 Teacher <del>(1.0 Kindergarten Teacher)</del> → 1.0 Grade 1 Teacher	1.0 Grade 2 Teacher <del>1.0 Kindergarten Teacher (from FY16)</del>	1.0 Grade 3 Teacher
Middle	1.0 Grade 5 Teacher 1.0 Guidance Counselor (from FY17) ← 1.0 Unified Arts Teacher	1.0 Unified Arts Teacher <del>(1.0 Guidance Counselor)</del> moved to FY16 1.0 Special Education Teacher	
High	3.0 FTEs for reduction of the non-engaged/non-scheduled students	1.0 FTE for reduction of the non-engaged/non-scheduled students 1.0 Guidance Counselor	1.0 FTE for reduction of the non-engaged/non-scheduled students
District-wide	2.0 English Language Learner Teachers		1.0 Technology Staff 1.0 Instructional Technology Specialist 1.0 SEL Staff Person
Total FTE Count	10	5	5

**FY17 Budget**  
**New Position Break Down by Level**

**Chart #2**

	<i>Elementary Positions From Year Two of Override Funds (FY17)</i>	
<u>Positions</u>	<u>Rationale</u>	
Grade 2 Teacher (1.0)	The Grade 2 teacher will reduce class size and create the capacity to support increase in elementary enrollment	

	<i>Middle School Positions From Year Two of Override Funds (FY17)</i>	
<u>Positions</u>	<u>Rationale</u>	
Unified Arts Teacher (1.0)	Engage students in enrichment programming; reduce the amount of students in study halls	
Special Education Teacher (1.0)	Special Education teacher to provide mandated instruction and services due to increased enrollment at the middle school level	

	<i>High School Positions From Year Two of Override Funds (FY17)</i>	
<u>Positions</u>	<u>Rationale</u>	
English (0.2)	To be used to create an additional section of Creative Writing and in the future used to create a section for Public Policy to address demand for English electives at BHS	
Foreign Language (0.2)	To be used to create an additional section of Spanish 2.	
Science (0.4)	To be used to absorb the larger numbers in Physics/Physics Honors and allow all students interested in our Technology/Engineering electives to participate, in addition to not having to close students out of AP Chemistry	
Social Studies (0.2)	To be used to create an additional section of Global Leadership and in the future used to create a section to support the Global Certificate Program	
Guidance (1.0)	To be used for an additional guidance counselor to address student's' college/career needs and counseling services	

## **FY17 Budget Details**

FY17 Budget: Distribution of Proposed General Fund Allocations by DESE Functions Pie Chart (Chart 1)

FY17 Budget: Distribution of Proposed General Fund Allocations by DESE Functions Table (Chart 2)

FY17 Budget – General Fund Breakdown (Chart 3)

FY17 Budget “All Funds” (Chart 4)

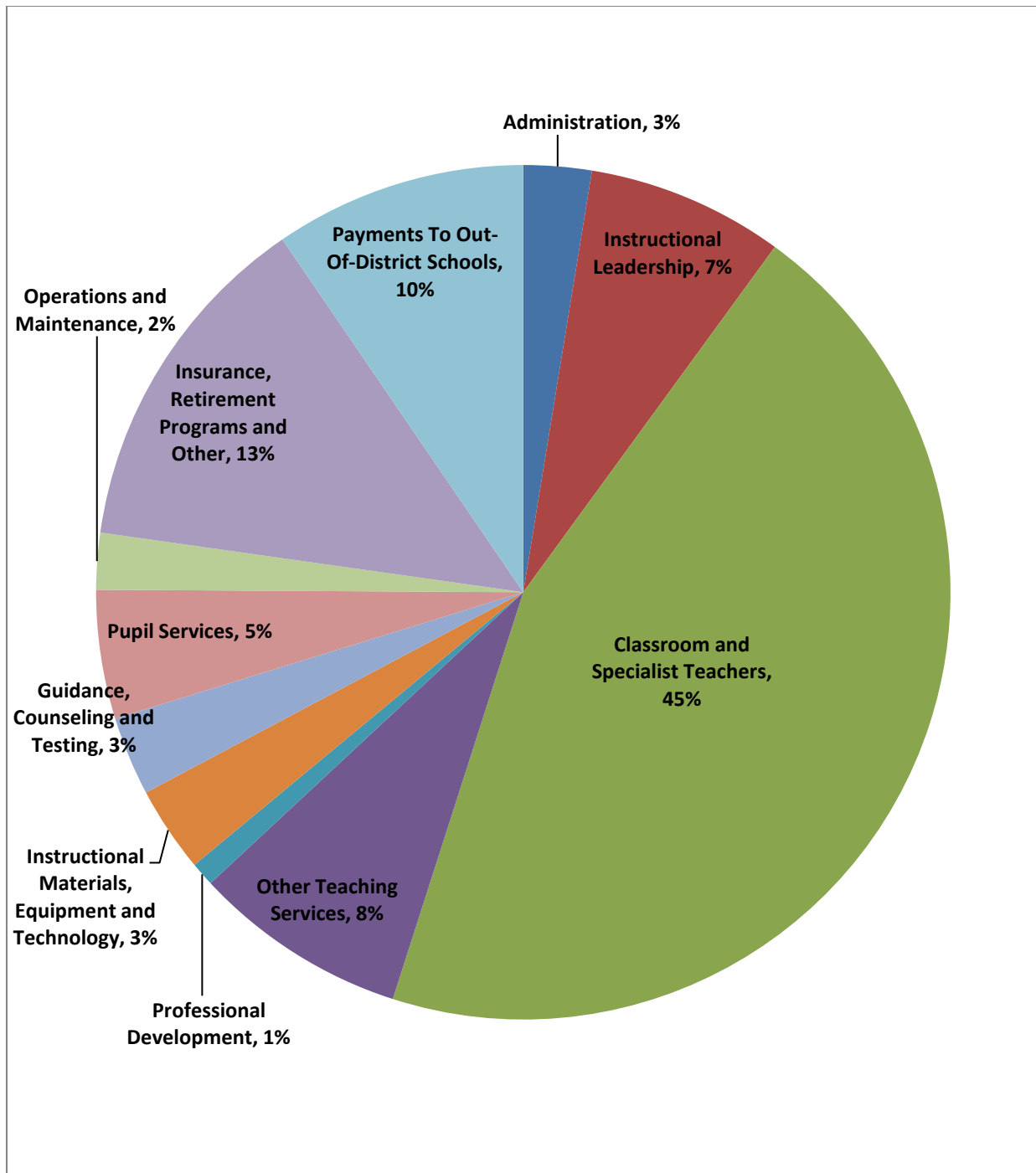
Proposed FY17 School Budget (All Funding Sources) (Chart 5)

Summary of FY17 Proposed Budget by Area (General Fund) (Chart 6)

Summary of FY17 Proposed budget by Area (Grants and Revolving Accounts) (Chart 7)

Current Belmont Public Schools Enrollment (5/1/15) (Chart 8)

**DISTRIBUTION OF PROPOSED GENERAL FUND ALLOCATIONS**  
**FY17 School General Fund Budget\* by Department of Elementary and Secondary Education (DESE)**  
**Function Category**  
**Chart #1**



**\*FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department.**

**DISTRIBUTION OF PROPOSED GENERAL FUND ALLOCATIONS - FY17 School General Fund\***  
**Budget by DESE Function Categories**  
**Chart #2**

			<b>FTE</b>	<b>\$</b>	<b>% of Total</b>
A	1	Administration	9.85	1,289,257	3%
B	2	Instructional Leadership	53.55	3,734,191	7%
C	3	Classroom and Specialist Teachers	278.50	22,516,091	45%
D	4	Other Teaching Services	86.78	4,075,410	8%
E	5	Professional Development	2.00	455,874	1%
F	6	Instructional Materials, Equipment and Technology	0.67	1,628,360	3%
G	7	Guidance, Counseling and Testing	18.08	1,498,449	3%
H	8	Pupil Services	9.35	2,443,533	5%
I	9	Operations and Maintenance	18.50	1,072,584	2%
J	10	Insurance, Retirement Programs and Other	-	6,634,241	13%
K	11	Payments To Out-Of-District Schools	-	4,778,593	10%
<b>TOTAL EXPENDITURES</b>			<b>477.28</b>	<b>50,126,583</b>	<b>100%</b>

**\*FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department.**

## FY17 Budget Overview: Budget by DESE Functions

### Chart #3

**Note: FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department. In FY16 School Department facilities line items were still reflected in the School Budget.**

<b><u>FY17 SCHOOL BUDGET:</u> GENERAL FUND ONLY</b>	<b>FY16 Budget</b>	<b>FY17 Budget</b>	<b>Change (FY17-FY16)</b>	<b>Change (%)</b>
<b>Salaries &amp; Fringe</b>	39,948,434	41,394,968	1,446,534	3.62%
<b>Instructional Expenditures</b> (supplies, materials, software)	1,302,679	1,355,789	53,110	4.08%
<b>Operations</b> (Central Office, IT, reg. ed. transport, maintenance, utilities)	2,888,755	712,041	-2,176,714	-75.35%
<b>Special Education</b> (tuition, transport, expenses)	5,520,202	6,663,785	1,143,583	20.72%
<b>Total</b>	<b>49,660,070</b>	<b>50,126,583</b>	<b>466,513</b>	<b>0.94%</b>
Total Salary & Fringe	39,948,434	41,394,968	1,446,534	3.62%
Total Non-Salary	9,711,636	8,731,615	-980,021	-10.09%
<b>Grand Total</b>	<b>49,660,070</b>	<b>50,126,583</b>	<b>466,513</b>	<b>0.94%</b>



## FY17 Budget “All Funds”

### Chart #4

**Note: FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department. In FY16 School Department facilities line items were still reflected in the School Budget.**

<b><i>FY17 SCHOOL BUDGET: ALL FUNDS: incl. General Fund, Grants, Rev. Accts.</i></b>	<b>FY16 Budget</b>	<b>FY17 Budget</b>	<b>Change (FY17-FY16)</b>	<b>Change (%)</b>
<b>Salaries &amp; Fringe</b>	42,456,942	43,878,582	1,421,640	3.35%
<b>Instructional Expenditures</b> (supplies, materials, software)	1,457,243	1,510,353	53,110	3.64%
<b>Operations</b> (Central Office, IT, reg. ed. transport, maintenance, utilities)	4,494,723	2,343,950	-2,150,773	-47.85%
<b>Special Education</b> (tuition, transport, expenses)	7,664,032	8,944,064	1,280,032	16.70%
<b>Total</b>	<b>56,072,940</b>	<b>56,676,948</b>	<b>604,008</b>	<b>1.08%</b>
Total Salary & Fringe	42,456,942	43,878,582	1,421,640	3.35%
Total Non-Salary	13,615,998	12,798,367	-817,631	-6.00%
<b>Grand Total</b>	<b>56,072,940</b>	<b>56,676,948</b>	<b>604,008</b>	<b>1.08%</b>

## PROPOSED FY17 SCHOOL BUDGET (ALL FUNDING SOURCES)

### Chart #5

**Note: FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department. In FY16 School Department facilities line items were still reflected in the School Budget.**

	<b>FY16 BUDGET</b>	<b>FY17 BUDGET</b>	<b>CHANGE FY17-FY16</b>	
GENERAL FUND	49,660,070	50,126,583	466,513	0.9%
GRANTS and REVOLVING	6,412,870	6,550,365	137,495	2.1%
TOTAL	56,072,940	56,676,948	604,008	1.1%

# SUMMARY OF FY17 PROPOSED BUDGET BY PROGRAM (General Fund)

## Chart #6

**Note: FY17 School General Fund Budget reflects approximately \$2.5 million migrated to the Town Facilities Department. In FY15 and FY16 School Department facilities line items were still reflected in the School Budget.**

	BUDGET FY15 FTE	BUDGET FY15 \$	BUDGET FY16 FTE	BUDGET FY16 \$	BUDGET FY17 FTE	BUDGET FY17 \$	CHANGE: FY16 VS FY17		
							FTE	\$	%(\$)
<b>REGULAR INSTRUCTION</b>									
1 English, Grades 5-12	24	1,862,851	24.7	2,035,813	25.8	2,142,725	1.1	106,912	5.30%
2 Reading, Grades K-8	9.2	802,050	8.85	792,108	8.15	759,372	-0.7	-32,736	-4.10%
3A-D Elementary, grades 1-4	62.9	4,789,634	65.9	5,005,466	68.27	5,161,087	2.37	155,621	3.10%
4 Fine Arts	1.3	108,660	1.3	113,308	1.3	117,785	-	4,477	4.00%
5 Art, Grades 1-12	10.8	941,769	11.2	1,012,567	11.7	1,074,528	0.5	61,961	6.10%
6 Music, Grades K-12	10.2	817,359	10.77	897,693	10.47	882,230	-0.3	-15,463	-1.70%
7 Theater Arts, Grades 7-12	-	-	0.2	13,000	0.4	22,990	0.2	9,990	76.80%
8 Kindergarten	9.05	673,339	9.7	755,247	8.7	708,951	-1	-46,296	-6.10%
9 Mathematics, Grades 5-12	24.85	1,915,356	25.75	2,045,656	26.15	2,002,706	0.4	-42,950	-2.10%
10 Physical Education, Grades K-12	7.65	577,634	9.55	730,645	10.35	799,220	0.8	68,575	9.40%
11 Science, Grades 5-12	25.2	2,004,274	25.4	2,118,368	25.6	2,256,036	0.2	137,668	6.50%
12 Health Education, Grades 6-12	2.4	159,649	2.1	149,143	1.8	136,861	-0.3	-12,282	-8.20%
13 Technology Education, Grades 6-12	2	159,388	2	165,874	2.2	138,126	0.2	-27,748	-16.70%
14 Social Studies, Grades 5-12	25.2	1,883,412	26.1	2,044,227	25.8	2,108,194	-0.3	63,967	3.10%
15 Foreign Languages, Grades 5-12	17.77	1,388,772	17.8	1,469,929	18	1,543,686	0.2	73,757	5.00%
<b>SUBTOTAL</b>	<b>232.52</b>	<b>18,084,147</b>	<b>241.32</b>	<b>19,349,044</b>	<b>244.69</b>	<b>19,854,495</b>	<b>3.37</b>	<b>505,451</b>	<b>2.60%</b>
<b>SPECIAL INSTRUCTION</b>									
20 ELL	5.57	368,644	8.6	600,890	9	589,551	0.4	-11,339	-1.90%
21 Early Childhood Education Pre-Kinder.	12.85	536,846	12	532,966	12.23	605,026	0.23	72,060	13.50%
22 Special Education, Grades K-12	102.25	9,439,899	103.7	11,156,394	105.44	12,628,508	1.74	1,472,114	13.20%
<b>SUBTOTAL</b>	<b>120.67</b>	<b>10,345,389</b>	<b>124.3</b>	<b>12,290,250</b>	<b>126.68</b>	<b>13,823,085</b>	<b>2.38</b>	<b>1,532,835</b>	<b>12.50%</b>
<b>STUDENT &amp; INSTRUCTIONAL SERVICES</b>									
30 Athletics & Intramurals, Grades 5-12	1	317,427	1	325,888	1	348,293	-	22,405	6.90%
31 Student Activities, Grades 5-12	0.25	42,910	0.25	44,021	0.25	40,308	-	-3,713	-8.40%
32 Food Service	-	-	-	-	-	-	-	-	0.00%
33 Guidance, Grades K-12	11	826,313	11	861,940	12.35	998,933	1.35	136,993	15.90%
34 Psychological Services, Grades Pre-K-12	6.73	498,362	6.83	529,164	6.83	551,240	-	22,076	4.20%
35 Health Services, Grades Pre-K - 12	7.9	597,233	7.9	640,412	8.1	687,015	0.2	46,603	7.30%
36 Library	5.65	275,929	5.94	272,275	6.23	289,480	0.28	17,205	6.30%
37 Technology & Audio Visual	9.52	1,197,811	10	1,249,093	9.5	1,293,775	-0.5	44,682	3.60%
38 Curriculum Development	1	119,619	1	125,000	1	159,907	-	34,907	27.90%
39 Staff Development	1	240,419	1	248,800	1	270,667	-	21,867	8.80%
40 Substitutes	-	435,000	-	475,000	-	480,000	-	5,000	1.10%
41 METCO	-	-	-	-	-	-	-	-	0.00%
42 Adult Education	-	-	-	-	-	-	-	-	0.00%
52 Regular-Day Transportation	-	140,000	-	140,000	-	241,800	-	101,800	72.70%
<b>SUBTOTAL</b>	<b>44.05</b>	<b>4,691,023</b>	<b>44.92</b>	<b>4,911,593</b>	<b>46.26</b>	<b>5,361,418</b>	<b>1.33</b>	<b>449,825</b>	<b>9.20%</b>
<b>OPERATIONS</b>									
50 Buildings & Grounds	7.1	848,667	7.1	878,816	5	286,391	-2.1	-592,425	-67.40%
51 Custodial Services	13	1,021,995	13	1,074,872	13.5	670,593	0.5	-404,279	-37.60%
53 Utilities	-	1,380,253	-	1,444,889	-	-	-	-1,444,889	100.00%
<b>SUBTOTAL</b>	<b>20.1</b>	<b>3,250,915</b>	<b>20.1</b>	<b>3,398,577</b>	<b>18.5</b>	<b>956,984</b>	<b>-1.6</b>	<b>-2,441,593</b>	<b>-71.80%</b>
<b>LEADERSHIP &amp; ADMINISTRATION</b>									
60A-F Building Administration	31.72	1,984,352	31.72	2,026,618	31.3	2,082,991	-0.41	56,373	2.80%
61 Central Administration	8.9	899,996	8.9	949,996	9.85	1,011,915	0.95	61,919	6.50%
62 Legal Services	-	169,950	-	169,950	-	201,950	-	32,000	18.80%
63 School Committee	-	15,800	-	15,800	-	13,600	-	-2,200	-13.90%
<b>SUBTOTAL</b>	<b>40.62</b>	<b>3,070,098</b>	<b>40.62</b>	<b>3,162,364</b>	<b>41.15</b>	<b>3,310,457</b>	<b>0.54</b>	<b>148,093</b>	<b>4.70%</b>
<b>CONTRACT ALLOWANCE &amp; FRINGE BENEFITS</b>									
70 Contractual Allowance	-	414,667	-	179,656	-	185,904	-	6,248	3.50%
71 Fringe Benefits	-	6,299,761	-	6,368,586	-	6,634,241	-	265,655	4.20%
<b>SUBTOTAL</b>	<b>-</b>	<b>6,714,428</b>	<b>-</b>	<b>6,548,242</b>	<b>-</b>	<b>6,820,145</b>	<b>-</b>	<b>271,903</b>	<b>4.20%</b>
<b>GRAND TOTAL</b>	<b>457.95</b>	<b>46,156,000</b>	<b>471.26</b>	<b>49,660,070</b>	<b>477.28</b>	<b>50,126,583</b>	<b>6.02</b>	<b>466,513</b>	<b>0.90%</b>

**SUMMARY OF FY17 PROPOSED BUDGET BY FUNDING SOURCE (Grants & Revolving Accounts)**  
**Chart #7**

(Note: These are separate from the General Fund budget amount voted by Town Meeting.)

	Budget FY16	Budget FY17	
	\$	FTE	\$
<b>GRANTS:</b>			
SPED IDEA	912,022	-	912,022
SPED PROGRAM IMPROVEMENT	12,480	(stipends)	12,480
CIRCUIT BREAKER	1,276,808	-	1,413,257
TITLE IIA - TEACHER QUALITY	71,625	0.70	73,396
SPED PRE-K	25,200	0.28	26,327
SPED PRE-K Improvement	1,723	-	1,723
TITLE I	196,665	2.00	253,525
TITLE III	47,791	0.40	59,460
TITLE III Summer Support	1,124	(stipends)	1,124
ACADEMIC SUPPORT	0	(stipends)	0
METCO	539,629	5.25	517,750
FULL DAY KINDERGARTEN GRANT	157,671	6.49	126,069
<b>SUBTOTAL</b>	<b>3,242,738</b>	<b>15.12</b>	<b>3,397,132</b>
<b>REVOLVING ACCOUNTS:</b>			
BHS ATHLETIC REVOLVING	499,590	(stipends)	493,870
CMS FINE ARTS, CLUBS & REVOLVING	46,811	(stipends)	48,156
TUITION - STUDENTS	206,621	1.52	141,649
BUSING FEES	200,000	-	200,000
FULL DAY KINDERGARTEN REVOLV	902,719	14.51	881,252
FOOD SERVICE	802,001	16.91	883,675
INSTRUMENTAL MUSIC REVOLVING	78,092	1.20	82,925
BHS FINE & PERM ARTS REV	62,394	(stipends)	59,646
BHS CLUBS & ACTIVITIES	20,097	(stipends)	25,724
ADULT ED	19,120	(stipends)	9,120
SATURDAY MORNING MUSIC	44,500	(stipends)	50,000
SUMMER SCHOOL	8,188	(stipends)	37,000
SCHOOL BUILDING RENTALS	245,000	0.30	205,215
<b>SUBTOTAL</b>	<b>3,135,132</b>	<b>34.44</b>	<b>3,118,233</b>
<b>OTHER:</b>			
TOWN TRANSFER-SHARED IT SUPPORT	35,000	0.50	35,000
LABBB OOD TUITION CREDIT	0	-	-
<b>SUBTOTAL</b>	<b>35,000</b>	<b>0.50</b>	<b>35,000</b>
<b>TOTAL GRANTS AND REVOLVING</b>	<b>6,412,870</b>	<b>50.06</b>	<b>6,550,365</b>

# CURRENT BELMONT PUBLIC SCHOOLS ENROLLMENT (5/1/15)

	Pre	K	1	2	3	4	5	6	7	8	9	10	11	12	Subtotals 2016	Subtotals 2015	Subtotals 2014
Wellington	15	22	25	25	22	24											
	13	22	24	23	22	24											
	15	21	24	24	21	25											
	12	21	25	24	22	23											
	15	21	25	24	21	25											
	70	107	123	120	108	121									70 579	72 557	80 522
Burbank		20	23	24	25	22											
		20	25	24	24	24											
		20	24	24	23	24											
		60	72	72	72	70									346	352	355
Butler		22	23	25	24	19											
		23	24	24	25	24											
		24	23	24	25	24											
		0	18	0	0	0											
		69	88	73	74	67									371	340	362
Winn Brook		20	25	23	23	24											
		20	24	24	22	22											
		19	25	24	24	23											
		20	24	24	23	24											
		79	98	95	92	93									457	456	446
Chenery M.S.							331	343	326	322					1322	1283	1274
Belmont H.S.											305 334 296 308				1243	1231	1177
TOTALS	70	315	381	360	346	351	1322				1243						

	<i>DISTRICT</i>	<i>DISTRICT</i>	<i>DISTRICT</i>
<i>PRE</i>	<i>2016</i>	<i>2015</i>	<i>2014</i>
<b>70</b>	<b>4388</b>	<b>4291</b>	<b>4216</b>
<i>ELEMENTARY</i>			
<b>1753</b>			
<i>SECONDARY</i>			
<b>2565</b>			

Race 2015-16	% of District	% of State
African American	3.4	8.8
Asian	18.0	6.5
Hispanic	3.7	18.6
Native American	0.1	0.2
White	68.0	62.7
Native Hawaiian, Pacific Islander	0.0	0.1
Multi-Race, Non-Hispanic	6.6	3.2
Title 2015-16	% of District	% of State
First Language not English	20.2	19.0
English Language Learner	5.9	9.0
Students With Disabilities	10.0	17.2

## **FY17 CAPITAL BUDGET REQUEST**

1. Winn Brook Boiler replacement
2. Security upgrades
3. Information Technology switching equipment
4. Butler sidewalks
5. Furniture for new classrooms at: High School modulares (3), Middle School modulares (6), Burbank classrooms (2)

## **CAPITAL ITEMS APPROVED AT MAY 2016 TOWN MEETING**

1. Modular classrooms at Chenery Middle School
2. Feasibility study for Belmont High School potential project during MSBA Eligibility Period



# *Town of* **Belmont** MASSACHUSETTS



**Fiscal Year 2017 Capital Budget Committee  
Report to Belmont 2016 Annual Town Meeting**

## **FY2017 Capital Budget Committee Report to Belmont 2016 Annual Town Meeting**

### **Introduction**

In the Capital Budget Committee (“CBC” or “this Committee”) Annual Town Meeting Report, the CBC deliberately repeats some of the material from its previous reports. This decision is motivated by two considerations. First, every year brings new Town Meeting Members. The Committee believes that some of them may benefit from the background provided. Second, some of this Committee’s recommendations and observations are a work in progress. Although each year we have more developments to report, this Committee believes that it is worthwhile to keep this material in the minds of Town Meeting Members. The report contains captions to assist readers in finding their way through the report.

The report touches on the following topics:

- Who Is the CBC and What Does It Do?
- What is the Difference between the Common Understanding of “Capital Asset” and the CBC Responsibility?
- Some General Remarks
- The Community Preservation Act and Its Interaction with the Capital Budget
- The Town’s Roads and Sidewalks
- Status of Large, Extraordinary Capital Projects
- Belmont High School Building Project
- Policy Adoptions
- Additional Classroom Space
- Financial Task Force Capital Budget Recommendations
- Privately Funded Capital Improvements
- Recommendations for FY2017 Capital Budget
- Enterprise Funds
- Five-Year Projection of Belmont’s Capital Needs

As discussed below, only the last three items are required by the Town’s by-laws to be reported to Town Meeting. The Committee believes, however, that the rest of the material is useful.

## **Who Is the CBC and What Does It Do?**

The Capital Budget Committee is established by Article 13 of the Town by-laws. There are seven members: three are appointed by the Moderator for terms of three years; the other four are the chairman (or a member appointed by the chairman) of the Board of Selectmen, the Warrant Committee, the Planning Board, and the School Committee, all of whom serve at the pleasure of the appointing authority. The members of the Committee who acted on the FY2017 Capital Budget recommendations are:

Susan Burgess-Cox (School Committee)  
Jennifer Fallon (Warrant Committee)  
M. Patricia Brusch (Moderator appointee)  
Raffi Manjikian (Planning Board)  
Mark Paolillo (Board of Selectmen)  
Rebecca Vose (Moderator appointee)  
Anne Marie Mahoney (Moderator appointee)

Mrs. Mahoney serves as the Committee's chairman and Ms. Vose serves as its secretary. Glen Castro, Budget Analyst for the Town, serves as staff liaison to the Committee. David Kale, Town Administrator, attends Committee meetings.

According to Article 13 of the Town's by-laws:

It shall be the duty of the Committee annually to prepare a capital report showing, for each six years hence following a list of those public improvements and non-recurring major equipment needs which, in its opinion, represent the most necessary enhancement projects or purchases to be undertaken by the Town during each such year. The report shall include the probable cost of each such improvement or purchase and the Committee's recommendations as to the method of financing them.

This spring the Committee has devoted its time to review and analyze the FY2017 capital requests from town departments and the schools.

While the CBC has identified major projects that need to be addressed, last year the Financial Task Force sub-group on Capital Projects examined all outstanding capital needs in the Town with a goal of providing a comprehensive plan to deal with them; the Facilities Manager hired in calendar 2013 presented a refined and coordinated set of capital requests. The most significant development in prioritizing capital projects is the Massachusetts School Building Authority's decision to move forward with plans to renovate or rebuild Belmont High School. (More detail on these developments is presented below.) To aid in the comprehensive planning of capital projects, the CBC took time after the 2013 Annual Town Meeting to develop criteria for assessing and prioritizing all the Town's potential capital projects, including the Concord Avenue campus and its component parts. These criteria were refined and became part of the working material for the Capital Projects sub-group of the Financial Task Force.

The Underwood pool project funded by a 2014 debt exclusion vote and Community Preservation Act (CPA) funds was completed in summer 2015. The Belmont Center Reconstruction project, whose funding was approved by a special Town Meeting in November 2014, is still in progress.



In an effort to streamline the Capital Budget process, the Committee has requested that a preliminary or draft capital budget be formulated through the Town Administrator and then presented to the Capital Budget Committee in the same manner as the current operating budget is formulated each year by the Town Administrator and presented to the Board of Selectmen and then to the Warrant Committee. For items recommended by the School Department, the requests are first reviewed by the School Committee, some changes made and then these are forwarded to the Capital Budget Committee. Requests that are funded by the Town's enterprise funds are submitted directly to the Committee for recommendations to Town Meeting. In preparing to recommend an annual Capital Budget, the Committee collects requests from Town departments (including the School Department) for capital expenditures to be made from enterprise funds, from state reimbursements, and from general tax. With respect to items to be paid from general tax, the Board of Selectmen proposes to the Warrant Committee and the Capital Budget Committee an amount to be spent in the Capital Budget. (The override vote in April 2015, which approved additional funding for the capital budget in FY16 and FY17, will be discussed in greater detail below.) After receiving requests from Town departments and [a] proposed general tax budget allocation[s] from the Board of Selectmen, the Committee, at its meetings, interviews representatives from those departments that have made requests. This year – as for the last several years – the process began with the individual members of this Committee reviewing copies of the departmental requests and developing individual questions regarding those requests. Those individual questions were then pooled and submitted to the departments in writing.

In some instances, department heads meet with the Committee to discuss future requests. This year, the Town Clerk described the move toward optical scanning of ballots as well as the possibility that census data may require Belmont to create a 9<sup>th</sup> precinct. David Petto, our Director of Information Technology, also appeared before the CBC to discuss the need in the near future to deal with the Town's fiber optic network. This need arises from the decommissioning of the Old Light Building where some of this network is located.

After interviewing department representatives,<sup>1</sup> the Capital Budget Committee proceeds to assemble a recommended budget for the next fiscal year. The Committee considers each item that has been requested and votes whether that item should be included in its recommended budget. The item is included if it receives a majority vote; unanimity is not required. The requests for capital funds from various departments are, at the request of the Committee, presented by each department in a priority order. This is particularly helpful when the Committee is confronted with requests that are technical and have implications only for the department making the request. When, however, the request is less technical and/or has implications for others outside the department making the request, the Committee often exercises its own sense of priority.

With the hiring of a new facilities manager, all building related requests for the entire town and school buildings, and beginning this year the library, have been combined. This year the

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<sup>1</sup> In some instances department heads withdraw or adjust specific requests as a result of new information that becomes available after budgets have been submitted and sometimes as a result of the interview process itself. This happened in a few instances for FY2017.

Facilities Department requested items for the fire station, fit-outs of high school and Burbank modular classrooms, Winn Brook, DPW and town-wide security.

### **What Is the Difference between the Common Understanding of “Capital Asset” and the CBC Responsibility?**

The definition of capital expenditure for which the Committee is responsible is *not* the common understanding of a capital asset – it is a narrower concept. The common understanding of a capital asset is some asset that can be used and enjoyed for an extended period of time, often taken as more than one year, or that can be used to produce another product. It is often thought of as anything that is not for immediate consumption. This is *not* the definition with which this Committee works.

Note the key words in the by-law responsibility quoted previously – “public improvements and non-recurring major equipment needs.” An example of the differences between the two concepts that is very relevant to the Town’s budgeting process is police cruisers. In common understanding, an automobile is a capital item but a police cruiser is a “recurring” item. (The average front-line cruiser is driven 25,000-30,000 miles in its first year. Cruisers must be replaced on a regular cycle.) In the view of the Committee, replacement of police cruisers belongs in the regular operating budget. As mentioned below, there are other items that should be considered part of the operating budget that have a tendency to find their way into the capital budget process.

In an effort to draw a “bright line” between what it would consider and not, more than twenty-five years ago a previous Capital Budget Committee established a \$10,000-per-item requirement for requests addressed to it. In 1985, it was the intent of the then Capital Budget Committee to raise that amount to \$12,500 but that did not happen.

Although the existing criteria for inclusion in the Town’s Capital Budget could be considered very outdated, the CBC’s review of the criteria recently produced no significant changes. The CBC communicates with the Town departments on a regular basis about what it expects to see in capital requests and what it will not entertain. The Committee ultimately decided that there were no comprehensive criteria that could adequately define what departments should consider capital requests and decided to leave the loose criteria of \$10,000 minimum and at least ten years of useful life, with the exception of technology. The Committee also recommended that the Town should consider establishing a technology fund for computer and other technological purchases. In addition to dealing with technology, the Committee will also explore a recommendation to the BOS on handling the facility manager’s requests so that requested items qualify as capital.

Meanwhile, increasing pressure on the Town’s operating budget resulted in the virtual elimination of a line item (“Capital Outlay”) in departmental budgets under which the small or recurring capital items had been purchased. (This line item has now been restored, but for FY2017 the limited funds available do not militate in favor of adequate funding of many requests under this category.) An even more insidious thing began to happen. Maintenance was not pursued. As noted below, the inevitable result of wear, tear, and simple weathering plus maintenance neglect is the seeming transmutation of a current expense item (maintenance) into a seeming capital expenditure (starting all over again). The current dismaying condition of the Town’s streets, some of which have deteriorated so badly that they cannot be repaired but must

be rebuilt – literally from the ground up – resulted (unsuccessfully, as noted below) in a targeted, separate funding proposal.

Confronted by increasing pressure from smaller or recurring requests, previous Capital Budget Committees, loathe to see necessary expenditures unmet, tried to accommodate small items and recurring items within previous Capital Budgets – often by turning a blind eye to the practice of aggregating separate items in order to meet the \$10,000 threshold. As noted below, the current Capital Budget Committee is making a vigorous effort to confine the Capital Budget to items that are truly “public improvements and non-recurring major equipment needs.” As also noted below, however, members of the Committee do not feel that small capital items and recurring capital items are inappropriate expenditures for the Town; indeed, members of the Committee feel that the smaller capital expenditures, recurring expenditures, and maintenance of capital assets are very important and should be funded annually under their own explicit headings in each department’s operating budget. The members of the Committee feel, however, that the Capital Budget should be available to meet the needs of the Town that are truly “public improvements and non-recurring major equipment.” If at the end of the review process there is a small amount of money remaining in the capital budget allocation, the Committee has recommended funding maintenance or repairs that should have been included in the regular operating budgets of certain departments when those repairs relate to health and safety issues, e.g., the air duct cleaning of the schools in FY2012.

### **Some General Remarks**

There are some general topics, which the Committee wishes to emphasize to the Town Meeting. They are an envelope study and a coordinated approach.

In 1994, the Town commissioned a study of the roofs of major municipally owned buildings and embarked on a program to ensure that its buildings are weather tight above. (The roof program is further discussed below.) More recently, the School Department completed an envelope study of its buildings with the same objective.<sup>2</sup> (An envelope study is a study of the material enclosing the interior of a building, exterior walls, windows, doors and roof. These items enclose a building and are referred to as the building envelope.) The approach with respect to the non-School-Department assets of the Town is somewhat different. The facility audit has addressed this.

These studies form the basis of the extraordinary, large capital projects discussed below or for individual current capital budget requests.

The Committee applauds the Town for taking steps toward a coordinated approach to its capital needs and budgeting for those capital needs. Four years ago the School Committee and the Board of Selectmen entered into an agreement to create a single department that will deal with building and grounds maintenance and needs. At the time, the Library Trustees were not

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<sup>2</sup> The total estimate for work identified by the School Department envelope study was \$6.8 million, originally to be phased over five years. Many of the needs identified by the study might be classified for the operating budget rather than for the allocation to this Committee under the criteria discussed earlier in this report. Nevertheless, the figure indicates the magnitude of the task faced by the Town to protect its investment in capital assets. Much of this work has been completed. It is hoped that the entire project will wrap up over the next few fiscal years.

signatories to this agreement, however, they benefitted from input on their capital requests from the new director. The Library Trustees recently finalized an agreement to become part of the consolidated facilities department. In the fall of 2013 the Town hired a director for this consolidated facilities department. In FY2013, in anticipation of the initial work that will be done by this department, the building managers of the Town and the School Department recommended a facility audit of all buildings that have not been renovated in the last twelve (12) years in order to assess their status and to enable this new department head to begin to prioritize projects. The amount appropriated was \$175,000. The completed audit continues to inform the capital requests for facilities for FY17. The Committee will work with the BOS to ensure that the Facilities Department is adequately funded in the operating budget to handle routine maintenance.

Issues of coordination include acquisition and reuse of replaced equipment. A spirit of cooperation has developed among the departments who now make an effort to offer “hand-me-down” vehicles and equipment to other departments. In the past, this Committee noted examples of this spirit involving vehicles and emergency generators. Issues also arise regarding programs that have application to more than one Town operation. Recent examples include the proposals for building security, police and fire radio system, and a “reverse 911.”

### **Community Preservation Act and Its Interplay with the Capital Budget**

As has been reported previously herein, the Capital Budget Committee has long supported additional funding to address the Town’s capital budget needs. One new source of funding for certain types of capital projects is the Community Preservation Act (CPA) adopted by the Town in 2011 after voters accepted the act in November 2010. Fiscal 2014 was the first year of funding of projects under the CPA. Eligible projects must fall into the categories of affordable housing, recreation/open space, and historic preservation. This Committee is again pleased to see the range of projects proposed by the CPA Committee for funding. Some, if not most, of these projects would not meet the criteria for funding in the capital budget, not because they lack merit but because the Town has long stopped supporting certain types of projects for lack of money. Further, the projects on which CPA money can be spent for the most part are not considered central to the core functions of town government. This year the CPA projects include funds to rebuild the Winn Brook tennis courts. This would most certainly be a CBC request were it not funded by the CPA. CPA funds may not always lessen the burden on the Town’s capital budget but will support worthy projects that enhance the quality of life in Belmont and preserve valuable public assets that would otherwise suffer neglect.

### **The Town’s Roads and Sidewalks**

Although the maintenance (including rebuilding, if needed) of the network of streets in Town is (or should be) a recurring item, the funds for providing the Town with its streets have traditionally been included in the Capital Budget. As this Committee has observed previously, since much of the work on the Town’s streets must be planned and contracted for in advance and actually accomplished in warm weather over more than one fiscal year, the pavement management program of the Town would greatly benefit from a stable and predictable budgeting atmosphere. An adequate pavement management program could easily use the Town’s entire Capital Budget, but this Committee believes that some of the funds available to the Capital Budget should be available for the Town’s many other capital needs. In an effort to address as many needs as feasible, this Committee regularly recommends about half its annual allocation

(an amount based on the 2001 override) plus the targeted state aid (“Chapter 90”) to roads, and the remainder to other capital requests. In order to make the available road funds as effective as possible, the Selectmen have instructed the Department of Community Development to expend funds only on the travel surface, omitting almost all curb and sidewalk work. In 2014 the Committee was able to use \$200,000 in one-time funds for sidewalks and last year, the override vote included \$200,000 for sidewalk repair. (The Department includes curbs and handicap accessible sidewalks at intersections. The Trapelo Road/Belmont Street corridor includes both sidewalks and curbs because that is a state-funded project.) Sidewalk and curb construction to enhance safety around schools has traditionally been funded.

The Committee included extensive discussions of the Town’s streets and efforts to maintain them in its 2009 and 2010 reports to the Annual Town Meeting. The reader is referred to those reports for more detailed information.

### **Status of Large, Extraordinary Capital Projects**

Here is a summary of some of the large capital projects the Town is pursuing or faces – projects that cannot be undertaken within this Committee’s annual allocations from general tax.

#### *High School*

In January, 2016, the Massachusetts School Building Authority approved Belmont's application to begin the study of Belmont High School. The first phase of this study is the "eligibility Phase" where the town forms a building committee, approves funding through Schematic Design, and provides a lot of data about enrollments programs, and building maintenance procedures for the school system.

During this phase of the process MSBA and the School Department interact about present and future plans for the school system. This first phase lasts about 9 months, which would be November 2016. After careful review of all the documents presented, the MSBA will decide whether or not to invite Belmont to continue with a Feasibility Study.

Feasibility Studies with the MSBA include 4 basic scenarios for a project 1) do nothing, 2) renovate the building within the walls, 3) renovation with additions, and 4) a new building. All scenarios are explored using the same program and enrollment assumptions (yet to be determined). There obviously can be a number of different configurations within all 4 of these scenarios.

After talking with MSBA, the town has decided to fund the Feasibility Study with the proceeds from the sale of Woodfall Road, which is \$1.75M. This should be sufficient to hire an architect and owner's project manager, complete the Feasibility Study, do necessary testing of the soil and environment of the area being studied, and, after the town and MSBA decide on a final solution, to do a Schematic Design with a fairly detailed budget for the project that will then be used for a debt exclusion for the project.

### *Memorial Library Building*

The Belmont Public Library is almost 50 years old and in need of major renovation. The Library Trustees are undertaking a new feasibility study, up to half of the cost of which is funded by an appropriation from last year's capital budget, that will address how to meet its future needs while keeping the library on its current site. The study is a necessary first step in the process of reapplying to the Massachusetts Board of Library Commissioners.

### *Police Station*

In 2007-2008, a feasibility study was done of the Police Station currently located on Concord Avenue across from the Town Hall. The study explored a renovated facility on the current site and also explored a new facility located at either the current site or at the site of the Belmont Public Library. For many reasons the best location was deemed to be at the existing library site. However, that site now will be needed for a new or renovated library; therefore it will not be available for a Police Station. Also, the construction of a new Electric Light Substation will make that area currently next to the Police Station available space for another project, something that was not contemplated in the previous study (the rest of the Building further away from the Station was explored but not the substation part). The Feasibility Study for the Police Station was updated in February, 2016. This update includes the recommendation for a 30,000 gross square foot facility that could best be located at the incinerator site on Concord Avenue. The study concludes that "the total cost of developing the Police Station portion of the Incinerator Site is \$18,400,000."

### *Department of Public Works Facility*

In 2006, a study was done of the needs of the DPW, which includes many departments, among them Cemetery, Water, Parks and Recreation, and Highway. The estimated cost of consolidating and replacing the buildings on site at the Town yard was nearly \$20M (in 2006 dollars). This estimate was updated as part of the facilities audit and is now \$28M.

### *Other Projects*

There are other, less-well-defined projects that have received some consideration by this or other committees of the Town. They include the White field house and the Vigliolo skating rink as well as the future use of the incinerator site once it is capped. (In 2015 a group of ice hockey supporters began discussions with School administrators, the School Committee and the BOS about a private/public partnership to construct a new rink. The prospect of a new or renovated high school building has put those discussions on hold.) Also on the horizon are some updating needs at schools that have not been renovated in the past 20 years. These include the Daniel Butler School (renovated in 1979-80), and the Winn Brook and Burbank Schools (renovated in 1987-89). A study to explore the needs for these facilities is among the items covered in the facilities audit.

## **Policy Adoptions**

### *Policies Related to Debt Service and Funding of Multi-Year Projects*

In 2013, at the urging of the Town Treasurer the Committee developed and adopted a policy on the amount of the Town's Capital Budget that will be spent on debt service. As the Town uses debt or lease/purchase arrangements to acquire large capital items, such a policy satisfies

municipal bond rating agencies (e.g., Moody's) of the fiscal soundness of the Town's assumption of debt obligations.

This policy is as follows:

The Capital Projects Discretionary budget will set aside not more than 33% for debt service/lease purchase payments. The request must be greater than \$100,000 with a useful life of 10 years. The Treasurer will provide annually and update the Capital Budget Committee with an amortization schedule of payments. The Capital Budget Committee will review this policy annually by February 1 and forward to the BOS, Warrant Committee, Town Accountant, and Treasurer an update on the review.

The Committee has endorsed a policy with respect to multi-year capital projects that it will not recommend funding the next year of such projects until substantial progress has been made.

### **Additional Classroom Space**

In response to continuing growth in enrollments at all levels of the school system, Superintendent Phelan formed a Space Study Task Force in the fall of 2015 to advise the School Committee of possible solutions to the burgeoning numbers. This committee (details found in the School Committee Report to Town Meeting) included the chairman of the Capital Budget Committee since expenditures to address growing enrollments would likely come from the Capital Budget. The Task Force met frequently throughout the fall and in January, concurrent with the announcement of state funding of the Belmont High School project, agreed on several recommendations.

For the 2016-17 school year (FY17) six modular classrooms with necessary bathroom and administrative space will be purchased and installed on the tennis courts at the Chenery Middle School. These classrooms will likely remain in place for up to ten years. The cost for purchase, set up, and furnishing these modular classrooms is \$1.4 million. Because this single expenditure would take more than the amount of money allocated to the CBC for discretionary spending in FY17 the Board of Selectmen and Capital Budget Committee agreed to recommend to Town Meeting that the full amount be taken from free cash.

Additional classroom space will be required at the high school and the Burbank for the 2016-17 school year. Three classrooms will be created in modulars already set up behind the high school, which are left over from prior school building projects. Two spaces at the Burbank will be outfitted as classrooms.

The CBC includes this somewhat lengthy explanation of plans for additional system wide classroom space because we believe, in consultation with Superintendent Phelan, that more classrooms will be needed in future school years. The CBC anticipates that these future requests to fund modulars and/or to outfit additional classrooms may become more and more difficult to include in our limited budget allocation.

## **Financial Task Force Capital Budget Recommendations**

In the late fall of 2013, the Board of Selectmen formed a Financial Task Force with broad representation from elected and appointed committees and boards as well as citizens with financial expertise. The purpose of the task force was “to develop a multi-year Financial and Capital Investment Plan; to critically review various programmatic topics for both Town and School Departments; to understand current and future expenditure and revenue issues to support quality municipal and educational services and capital improvements.” The FTF and the various sub-groups met monthly through January 2015 - culminating in the Selectmen’s decision in February 2015 to place a \$4.5 million override on the annual Town election ballot in April. The override passed and details of the impact on the CBC are outlined in a separate section of this report.

For FY17 the CBC will receive an additional \$120,000, which will be used in combination with the FY16 \$120,000 to provide a combined borrowing capability of \$1.0 million to replace the Belmont High School fire alarm system in the summer of 2016. The additional yearly infusion of \$200,000 for sidewalks and \$300,000 for roads is reflected in this year’s budget.

The Capital Projects sub-group of the FTF focused on forming a plan for monitoring, prioritizing, addressing and funding all outstanding capital projects. (See FTF report to 2015 Annual Town Meeting for further details.) The plan recognized that major Capital projects such as the Wellington School, Harris Track and Field, Belmont Center Reconstruction, the Belmont Municipal Light Department Substation, and Underwood Pool either have been completed in the past few years or are currently under construction. This leaves Belmont High School, the Library, the Police Station, the DPW facility, the incinerator site and the skating rink/White Field House to be addressed. (See FTF report for detail.) Based on the criteria of need, certain site, updated plan, and current cost estimate the sub-group recommended that the remaining projects be done in the following priority order: Belmont High School, incinerator site, DPW, Library and Police Station.

In January 2016, the Massachusetts School Building Authority accepted Belmont’s application for funding renovation/construction of Belmont High School. Additionally, the Board of Library Trustees, in light of the BHS project’s going forward, have agreed to skip the next Massachusetts Board of Library Commissioners grant round for construction/renovation of the Belmont Public Library. Private donors are currently exploring the funding of skating rink and field house replacement. This leaves the DPW facility and the Police Station unaddressed. The Capital Budget Committee will continue to meet in 2016 to form a long-range plan for completion of the Library, DPW and Police Station.

Finally, the CBC continues to request a predictable annual allocation of \$3.0 million for capital requests from the department heads.

## **Privately Funded Capital Improvements**

Each year “private” groups such as the Soccer Association, Little League and Parents of ... groups provide much needed improvements and upgrades to our fields and recreational facilities. Without their generous support in donating irrigation systems for Winn Brook fields and sprucing up of the White Field House as two examples this much needed work would fall to the Capital Budget or become a request for CPA funds. Last summer private donations funded the



replacement of the varsity basketball court floor at the high school. Recently, a group of ice hockey supporters expressed interest in a private/public partnership to replace the Viglirolo Rink; as the high school project proceeds and the plans for that campus become clear, such a partnership could well become reality.

This year the Capital Budget Committee worked with donors to form a creative solution to funding the Press Box at the Harris Field. This final piece of the original 2001 renovation of the field is finally approved for construction. Because the Capital Budget does not have \$240,000 to fund the Press Box the following cumulative funding solution has been offered: \$40,000 remaining from the 2001 Harris Field Building Committee; \$125,000 of unused Capital money from the 2014 Harris Field replacement project; \$75,000 pledged by the Belmont Boosters and other donors.

The community spirit shown in each of these partnerships is much appreciated by the department heads and the Committee and should be recognized by the citizens of the Town.

### **Recommendations for FY2017 Capital Budget**

For FY2017, the Committee initially received requests for more than \$6.2 million dollars in capital expenditures. This does not include requests that will be covered in separate Warrant articles for water and sewer equipment and projects funded by enterprise funds, which are generated from user fees. The total funding for the Capital budget in FY2017 is \$2.6M, which includes total one-time funds of \$1.2M in accumulated insurance settlements and turn backs. Note that this amount is made artificially high as a result of this one time money. The start point for funding the discretionary requests is \$1.4M. \$1.601M is reserved for Pavement Management as a result of the 2001 and 2015 overrides. This year's Chapter 90 money is estimated to be \$535,089.

Following discussions between departments and this Committee, and further investigations, some initial requests were modified or withdrawn altogether. Still, the amount requested for projects that this Committee believes are appropriate and important for the FY2017 capital budget, if funded immediately, exceeds the funds available.

The large amount of the requests and the limited funds available allows the Committee to address only the most pressing requests each year. As reported to past Town Meetings, the Committee believes that the Town's allocation to the Capital Budget each year should be at least \$3.0 million (exclusive of money devoted to roads) and that that amount should increase each year by the same 2½% allowed to other aspects of the Town's general tax budget. Although the 2½% annual growth has been put into practice in some years (and in this year) for the Pavement Management Program, the base figure is nowhere near the \$3.0 million recommendation. Moreover, a study of the five-year chart at the end of this report indicates that, even with an increased allocation, some years will present a challenge. Without increased allocations, further creative financing is inevitable. In addition, the Committee has gone on record as strongly supporting the efforts of the Warrant Committee to establish a system whereby the condition of the Town's large capital assets can be assessed, indexed, and tracked from year to year.

Article 14 in the warrant will contain the Committee's FY2017 recommendations. In addition to the annual Capital allocation, this Committee routinely recommends reallocation of funds previously appropriated for capital projects that are now complete.

## PUBLIC SAFETY

*Police Equipment:* This is for a Zetron Station Alerting Software Conversion, which is the last piece of the town wide public safety radio system upgrade.

*Turn Out Gear:* This replaces half of the Fire Department's turn out gear, which is approaching the end of its useful life.

*Ambulance Replacement:* This is the third year of the Fire Department's new five-year program to fund a replacement ambulance and cardiac monitor by setting aside \$57,000 from Advanced Life Saving (ALS) receipts annually. A total of \$150,000 has been held in reserve and will be added to the \$166,000 request in this year's budget to fund the \$316,000 ambulance. Five years is the life-expectancy of front-line equipment. The current ambulance would then become the back-up vehicle. The funds in this "equipment replacement" account are in addition to the Committee's annual budget allocation.

## PUBLIC FACILITIES

*Fire Station Envelope Repairs:* This is to repair leaks at both fire stations and will be supplemented by \$985,000 in proceeds from the favorable settlement of insurance litigation against the buildings' contractor and its subcontractors.

*DPW Garage Ventilation Improvements:* This project addresses concerns about ventilation inside the building and installs a more efficient heating system.

*Town Wide Security:* This provides funds for installing additional security cameras in Town and School buildings, which is part of Phase #3 of this project.

*Winn Brook School Boiler Replacement:* This project replaces a 50+ year-old boiler, which is a 65% efficient steam boiler and heat exchanger. The replacement is a condensing 93% efficient water boiler.

## LIBRARY

*Boiler Replacement:* This project replaces a 50+ year-old boiler, which is a 65% efficient steam boiler and heat exchanger. The replacement is a condensing 93% efficient water boiler. Boiler malfunctions caused the library to close 9 days in the last heating season.

## DEPARTMENT OF PUBLIC WORKS

*Above Ground Mobile Lift:* This equipment is critical to the repair and maintenance of DPW equipment. It replaces a 1990 model that is too small for DPW's current equipment.

*Sidewalks:* This will pay for sidewalk repair in Town and is funded by the 2015 override.

*Sidewalk Management Program:* This funds a study to identify and prioritize the condition of sidewalks throughout the Town and will inform the DPW's sidewalk repair program going forward.

*Sidewalk Vacuum Sweeper:* This equipment will maintain and clean sidewalks especially in the Town's newly rebuilt business districts. The amount recommended represents half the cost of this equipment because DPW is working with the Arlington DPW to purchase a single sweeper, which will be shared by both towns.

## HEALTH

*Animal Control Van:* This replaces a well-used 11 year-old van that is not outfitted for animal transportation.

## SCHOOLS

*Town-Wide Core Network Switching Equipment:* This replaces existing equipment at the High School, which has a life span of roughly six years. The network serves the entire Town and is under the management of the School Department's IT Department.

*Maple Terrace Sidewalk Installation:* This makes critically important improvements to the stretch of sidewalk at the Butler School, where existing conditions create a very dangerous situation for pedestrians and school children.

## OFFICE OF COMMUNITY DEVELOPMENT

*Pavement Management:* This continues the yearly infusion of money into the Town's Pavement Management program, which is discussed in greater detail in the narrative of the report. The Director of Community Development will report at Town Meeting on the specific streets to be paved with the FY 2017 funds.

## ENTERPRISE FUNDS

The Directors of Community Development and the Department of Public Works who are responsible for the management of these programs report annually to the Committee on the status of these undertakings and funding mechanisms. They are described here but are not part of the annual capital budget allocation.

*Water Main Replacement Program:* This is the continuation of the 30-year project to replace all the unlined cast iron pipe in the town's water distribution system (approximately 40% of the system) to ensure a continued reliable supply of clean water. The project was originally approved by Town Meeting in 1995.

*Water Main Bond Repayment:* The Water Main Replacement Program (described above) is funded in part by taking advantage of no-interest loans from the MWRA through the Local Pipeline Assistance Program (LPAP). This is an integral part of the capital finance plan for the upgrade of the Town's water system.

*Sewer and Drain Repair:* This funds the Town's ongoing program to repair infrastructure and alleviate flooding as well as to cover the cost of testing and inspection.

*Loader Backhoe:* This replaces a 1989 model used daily for the Town's water program.

*Smart Meter Replacement Program (Phase I):* This is an upgrade to an Advanced Meter Infrastructure system and will allow for instant consumption reads, leak detection and efficiencies in billing and customer access to their accounts.

*One Ton Pick-up Truck:* This replaces a 2008 vehicle used daily for sanitary sewer maintenance.

*High Pressure Flushing Unit:* This is mounted on an existing cab and chassis and is used as needed to flush sewer lines.

The Committee's recommendations for FY2017 are set forth in the motions that correspond to Articles 9 and 14 in the warrant. Water and sewer rates have been set appropriately to finance the expenditures recommended under Article 9. Chapter 90 Highway Funds from the State are covered in Article 13.

## Five-Year Projection of Belmont's Capital Needs

It is the responsibility of the Capital Budget Committee to present to the Town Meeting, in addition to the items to be funded in the upcoming fiscal year, a list of the expected projects for the following five years. (The available data, however, is often not precisely five years: the implications of some entries go beyond five years and, in a few instances, only four years projections are available. FY2017, dealt with above, is sometimes taken as year one.) In the past, it has been the practice of the Capital Budget Committee to compile this five-year list from requests from department heads and to present it largely unaltered.<sup>3</sup> For this year, we will continue with this practice. In particular, we have not deleted items that are to us not within our mandate (see second section, above). The appearance of an item in the chart should not be taken as a decision on our part that an item is properly within this Committee's jurisdiction. We might later screen out some items as more appropriate for the operating budget. This chart is a raw document for planning purposes only. The items in the chart have not been "vetted" either by the Town Administrator or the Capital Budget Committee. The chart is attached to this report.

One will note in the chart that there are items requested for buildings that may receive major renovation or replacement in the future. We are uncertain of the timing of any of these projects, and so have included repairs that have been identified in the year that it appears such a need will occur. It is expected that any expenditures of a capital nature will be carefully thought out in terms of the expected future of the facility. However, the buildings do have to function, and be safe and comfortable, for as long as they are being used.

This Committee asked that departments submit costs estimated for the year matching the effective date of the request, thus requiring an adjustment for the economy in future years. Some departments tried to comply with this request; others did not. Moreover, unmet capital requests from the past which we have tried to carry forward are shown at the values originally submitted (without adjustment). Finally, most of the capital items are subject to a bidding process before they are actually purchased. Therefore, these cost values should be treated as only roughly comparable orders of magnitude.

Several town departments make use of the Town antenna. This item is presented under the Police Department because that department has agreed to carry this item lest it be overlooked. The over-all expense is not an item entirely for the Police budget. Moreover, the over-all expense and phasing for this project have not yet been determined. The amount and phasing shown are very preliminary police estimates.

Because the Pavement Management Program must be executed on a seasonal basis, the Committee has not attempted to cast the full planning for roads by the Community Development

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<sup>3</sup> Some changes have been made, however, for editorial consistency. Another change is that the requests for FY2017 that could not be recommended have been added to the appropriate year (usually FY2018). The later change is somewhat arbitrary because many of these requests will in fact be modified before the departments make them (or substitute requests) again. This is because it often seemingly puts two years of a multi-year project into one year and because of "work arounds" that departments may have devised in the meantime. These workarounds may involve grants, gifts, funds diverted from operations, help from other departments, different approaches to the underlying problem, combination with other projects, and so forth. The Committee, however, believes it is best to keep these matters in mind.

Department in this fiscal year chart form. The Committee has met in past years with the Director of Community Planning, has reviewed his planning and is satisfied that the Pavement Program will make good use of any funds that this Committee is able to allocate to that Program for the indefinite future. A more extensive discussion of the roads situation is available in the previously cited reports of the Belmont Pavement Management Committee.

This chart contains some expenditures for sewer and water enterprise funds. The Director of Community Development is responsible for some of those projects in his capacity as Town Engineer. (As a general matter, the Director of Community Development is responsible for sewer capital projects and those items are in the Community Development Department budget; the Director of the Public Works Department is responsible for water capital expenditures and those items are in the DPW budget. The Committee has been assured that planning for water and sewer projects is coordinated between the departments.) Some water and sewer projects are funded or to be funded from the proceeds of borrowing previously authorized or which the Town Engineer hopes will be authorized. The debt service for that borrowing will be included in the operating budgets of the enterprise funds.

The Parks Division and the Cemetery Division have been combined but are still carried separately for budgeting purposes.

The request by non-school Town Technology for Phase I of a multi-year project to relocate fiber optic hubs (see 2014), and related requests in subsequent years, anticipates the disposition of the current main library and the former Municipal Light Department headquarters on Concord Avenue. These buildings house the two main hubs for the Town's fiber network, without which the Town's computer, telephone, security and radio systems would not work. Any sale or reconstruction of these buildings will require moving the hubs, a multi-year process that needs to start no fewer than three years before sale or reconstruction.

As the five year chart will demonstrate, it is doubtful that the Town can fund all worthy capital requests in coming years from the current, annual allocation to the capital budget. The Committee recommended financing some acquisitions (lease/purchasing of Police and Fire equipment) last year. This year the override vote allows the Town to move ahead with two projects deemed of vital importance and urgency through the Committee's increased borrowing capability. Among other possible financing approaches the Committee may consider in future are so-called BANS (bond anticipation notes), leasing, capital outlay exclusions, and debt exclusions. It is very likely that the Committee will make further recommendations in this regard in coming years.

Anne Marie Mahoney, Chairman  
Rebecca Vose, Secretary  
M. Patricia Brusch  
Susan Burgess-Cox  
Jennifer Fallon  
Raffi Manjikian  
Mark Paolillo

## FY18-FY22 Capital Budget Request - Capital Discretionary

<b>DEPARTMENT OF PUBLIC WORKS</b>	<b><u>FY18</u></b>	<b><u>FY19</u></b>	<b><u>FY20</u></b>	<b><u>FY21</u></b>	<b><u>FY22</u></b>	<b><u>TOTAL</u></b>
Major Capital Equipment Replacement Costs						
<i><b>Highway</b></i>						
Sidewalk Maintenance	210,125	215,378	220,763	226,282	231,939	\$ 1,104,486
Material Spreader				14,330		\$ 14,330
Sidewalk Tractor	169,340	-	169,340	-		\$ 338,680
Snow fighter Conversion	44,940	44,940	44,940	-		\$ 134,820
Sidewalk Roller	-	15,750	-	-		\$ 15,750
Central Fleet Utility Truck			66,300	-		\$ 66,300
<i><b>Parks</b></i>						
Pickup Truck	41,100	-	-		41,100	\$ 82,200
Dump Truck	-	-	79,900			\$ 79,900
Chiller Barrel at Skating Rink	21,000	-	-			\$ 21,000
Riding Mower	73,500	-	-			\$ 73,500
Front End Loader	-	82,700	-			\$ 82,700
<i><b>Cemetery</b></i>						
Dump Truck Rehabilitation	-	-	79,900			\$ 79,900
Backhoe	110,000	-	-			\$ 110,000
Pickup Truck	-	41,100	-			\$ 41,100
<b>Sub Total</b>	<b>\$ 670,005</b>	<b>\$ 399,868</b>	<b>\$ 661,143</b>	<b>\$ 240,612</b>	<b>\$ 273,039</b>	<b>\$ 2,244,666</b>
						2,244,666
<b>POLICE DEPARTMENT</b>	<b><u>FY18</u></b>	<b><u>FY19</u></b>	<b><u>FY20</u></b>	<b><u>FY21</u></b>	<b><u>FY22</u></b>	<b><u>TOTAL</u></b>
Two Domain Controller Servers	-	-	18,000			\$ 18,000
CAD / Records management Server4 & QED	-	-	-	25,000		\$ 25,000
Replace Fuel Accounting System	24,000	-	-			\$ 24,000
Net Clock System	-	28,000	-			\$ 28,000
Replace Network Switches		24,000				\$ 24,000
ReplaceTelephone and Radion Logging Recorder					16,500	\$ 16,500
<b>Sub Total</b>	<b>\$ 24,000</b>	<b>\$ 52,000</b>	<b>\$ 18,000</b>	<b>\$ 25,000</b>	<b>\$ 16,500</b>	<b>\$ 135,500</b>
						135,500



## FY18-FY22 Capital Budget Request - Capital Discretionary

<b>TOWN CLERK</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Election Systems Upgrade	68,000	-	-	-	-	\$ 68,000
<b>Sub Total</b>	<b>\$ 68,000</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 68,000</b>
<b>INFORMATION TECHNOLOGY</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Network Construction Services	\$ -	\$ 125,000	\$ 125,000	\$ -	-	\$ 250,000
Additional Data Storage Network	90,000	-	-	-	90,000	\$ 180,000
Fiber Network Assessment & Design Services	80,000	-	-	-	-	\$ 80,000
<b>Sub Total</b>	<b>\$ 170,000</b>	<b>\$ 125,000</b>	<b>\$ 125,000</b>	<b>\$ -</b>	<b>\$ 90,000</b>	<b>\$ 510,000</b>
						510,000
<b>LIBRARY</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Upgrade Fire Alarm System	85,000	-	-	-	-	\$ 85,000
Replace Gutters	10,000	-	-	-	-	\$ 10,000
Quiet Study Rooms	45,000	-	-	-	-	\$ 45,000
Crack, Fill Seal Stripe Parking Lot	20,000	-	-	-	-	\$ 20,000
Renovate (10) Bathrooms	57,000	-	-	-	-	\$ 57,000
Upgrade Light Fixtures Throughout	125,000	-	-	-	-	\$ 125,000
Chiller Rooftop Replacement	-	200,000	-	-	-	\$ 200,000
Replace Windows And Exterior Doors	-	250,000	-	-	-	\$ 250,000
Replace/Rebuilt Front Entrance Stairs & Railings (Upper)	-	32,000	-	-	-	\$ 32,000
Automatic Sprinkler System (wet)	-	-	400,000	-	-	\$ 400,000
Upgrade/Replace Unit Ventilators	-	-	40,000	-	-	\$ 40,000
Landscaping Redesign	-	-	38,000	-	-	\$ 38,000
Building Control System	-	-	60,000	-	-	\$ 60,000
Replace/Rebuilt Front Entrance Stairs & Railings (Lower)	-	-	-	130,000	-	\$ 130,000
Repave Parking Lot (storm water, regrading, etc.)	-	-	-	200,000	-	\$ 200,000
Replace Interior Doors & Hardware	-	-	-	62,500	-	\$ 62,500
Exterior Masonry & Railing Repairs General	-	-	-	12,500	-	\$ 12,500
Abatement of Stairwell Tiling & replace with new	-	-	-	18,000	-	\$ 18,000
<b>Sub Total</b>	<b>\$ 342,000</b>	<b>\$ 482,000</b>	<b>\$ 538,000</b>	<b>\$ 423,000</b>	<b>\$ -</b>	<b>1,785,000</b>
15% Contractor's Overhead	51,300	72,300	80,700	63,450	-	267,750
10% Contingency	39,330	55,430	61,870	48,645	-	205,275
	<b>432,630</b>	<b>609,730</b>	<b>680,570</b>	<b>535,095</b>	<b>-</b>	<b>\$ 2,258,025</b>
						2,258,025

## FY18-FY22 Capital Budget Request - Capital Discretionary

<b>FIRE DEPARTMENT</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Staff Vehicle	\$ 55,000	\$ -	\$ -	\$ -		55,000
*Ambulance Replacement*	65,000	65,000	65,000	65,000	65,000	325,000
*Cardiac Monitor Replacement*	7,000	7,000	7,000	7,000	7,000	35,000
Portable Radios	-	-	-	120,000		120,000
Replace Squad 1	50,000	-	-	-		50,000
Shift Commander's Vehicle	-	-	60,000	-		60,000
Replace 2003 Pumper	-	-	600,000	-		600,000
<b>Sub Total</b>	<b>\$ 177,000</b>	<b>\$ 72,000</b>	<b>\$ 732,000</b>	<b>\$ 192,000</b>	<b>\$ 72,000</b>	<b>\$ 1,245,000</b>
						\$ 1,245,000
<b>FACILITIES DEPARTMENT</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Town/School Security Upgrades Design (Year 3 of 6)	200,000	200,000	200,000	200,000		\$ 800,000
Butler Cafeteria Flooring - Asbestos & moisture mitigation	63,000					\$ 63,000
School Parking Lot and Sidewalk Paving Management (Yr. 1 of 5)	100,000					\$ 100,000
System Wide Building Envelope - FY15 allowed 133,070	250,000	150,000	100,000	100,000		\$ 600,000
Purchase Hybrid Box Truck w/charging station to replace 2003 Astro Van	48,000					\$ 48,000
Butler Replace boilers (Year 2 of 2)	-	50,000				\$ 50,000
Butler Replace emergency generator	37,500					\$ 37,500
Burbank Replace boilers (Year 2 of 2)		60,000				\$ 60,000
Winn Brook Replace master clock system	47,598					\$ 47,598
Systemwide univent rebuild/replacement (multiple years)	50,000	50,000	50,000			\$ 150,000
One Ton dump truck to replace Silverado	48,709					\$ 48,709
Higginbottom Pool Resurfacing	50,000					\$ 50,000
Chenery Middle School Resurface Auditorium Stage	30,000					\$ 30,000
Chenery Middle School Stage Equipment Risk Assessment	15,000					\$ 15,000
School parking lot pavement management (Years 2 - 5)	100,000	100,000	100,000	100,000		\$ 400,000
Winn Brook - Replace fire alarm system	158,658					\$ 158,658
Burbank - Site redevelopment study	50,000					\$ 50,000
Chenery - Refinish Gym Floor	60,000					\$ 60,000
Chenery - Upgrade Auditorium Lighting Control System	25,000					\$ 25,000
Facilities Dept. - Replace 2003 Astro Van	23,000					\$ 23,000
<b>Sub Total</b>	<b>\$ 1,356,465</b>	<b>\$ 610,000</b>	<b>\$ 450,000</b>	<b>\$ 400,000</b>	<b>\$ -</b>	<b>\$ 2,816,465</b>
						\$ 2,816,465

## FY18-FY22 Capital Budget Request - Capital Discretionary

<b>COMMUNITY DEVELOPMENT</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>TOTAL</b>
Road Program (all elements)	\$ 2,161,790	\$ 2,202,482	\$ 2,244,194	\$ 2,286,947	\$ 2,330,770	\$ 11,226,183
Concord Avenue Parking Lot	98,000					\$ 98,000
<b>Sub Total</b>	<b>\$ 2,259,790</b>	<b>\$ 2,202,482</b>	<b>\$ 2,244,194</b>	<b>\$ 2,286,947</b>	<b>\$ 2,330,770</b>	<b>\$ 11,324,183</b>
<b>TOTAL</b>	<b>\$ 5,157,890</b>	<b>\$ 4,071,080</b>	<b>\$ 4,910,907</b>	<b>\$ 3,679,654</b>	<b>\$ 2,782,309</b>	<b>\$ 20,601,839</b>
						<b>\$ 20,601,839</b>

## FY18-FY22 Capital Budget Request-Water and Sewer

<b>DEPARTMENT OF PUBLIC WORKS</b>	<b><u>FY18</u></b>	<b><u>FY19</u></b>	<b><u>FY20</u></b>	<b><u>FY21</u></b>	<b><u>FY22</u></b>	<b><u>TOTAL</u></b>
<i>Water Enterprise Charges</i>						
Water Main Bond Repayment	755,812	793,602	833,282	874,946		\$ 3,257,642
Smart Meter Program Phase I & II	850,000					\$ 850,000
<u>Major Capital Equipment Replacement Costs</u>						
<i>Water</i>						
Emergency Service Van	30,500	-				\$ 30,500
Pickup Truck	41,100	-				\$ 41,100
Pickup Truck	33,300	33,300				\$ 66,600
Administrative Vehicle	-	38,900				\$ 38,900
Dump Truck	-	130,305				\$ 130,305
<b>TOTAL</b>	<b>\$ 1,710,712</b>	<b>\$ 996,107</b>	<b>\$ 833,282</b>	<b>\$ 874,946</b>	<b>\$ -</b>	<b>\$ 4,415,047</b>
						<b>\$ 4,415,047</b>

## FY18-FY22 Capital Budget Request - Water and Sewer

DEPARTMENT OF PUBLIC WORKS	FY18	FY19	FY20	FY21	FY22	TOTAL
<i>Sewer Enterprise Charges</i>						
Front End Loader	\$ -	\$ -	\$ -	\$ 195,000	\$ -	\$ 195,000
<b>Sub Total</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>195,000</b>	<b>-</b>	<b>\$ 195,000</b>
<b>Major Capital Equipment Replacement Costs</b>						
<i>Highway</i>						
Pickup Truck	-	33,300			41,100	\$ 74,400
Pickup Truck					41,100	\$ 41,100
Replace Rear High Pressure Flushing Unit						\$ -
Dump Truck Replacement	130,305					\$ 130,305
Dump Truck Replacement	79,900					\$ 79,900
Smart Meter Program Phase I & II	850,000					\$ 850,000
Street Sweeper	-	-	187,425			\$ 187,425
Sewer Rodder	-	33,700				\$ 33,700
Air Compressor	-	26,250				\$ 26,250
<b>Sub Total</b>	<b>\$ 1,060,205</b>	<b>\$ 93,250</b>	<b>\$ 187,425</b>	<b>\$ 195,000</b>	<b>\$ 82,200</b>	<b>\$ 1,618,080</b>
						1,618,080
COMMUNITY DEVELOPMENT	FY18	FY19	FY20	FY21	FY22	TOTAL
EPA 308 Outfalls 1, 2 & 10 (DEP) Follow-up Sampling	\$ -	\$ -	\$ 40,000			\$ 40,000
Construction	40,000	40,000		40,000	40,000	\$ 160,000
<b>Sub Total</b>	<b>\$ 40,000</b>	<b>\$ 40,000</b>	<b>\$ 40,000</b>	<b>\$ 40,000</b>	<b>\$ 40,000</b>	<b>\$ 200,000</b>
<i>Sewer and Drain Repairs</i>						\$ 200,000
Sewer and Drain CCTV and Design Report	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 200,000
Sewer and Drain Design	20,000	20,000	20,000	20,000	20,000	\$ 100,000
Sewer and Drain Relining and Point Repairs	200,000	200,000	200,000	200,000	200,000	\$ 1,000,000
<b>Sub Total</b>	<b>260,000</b>	<b>260,000</b>	<b>260,000</b>	<b>260,000</b>	<b>260,000</b>	<b>\$ 1,300,000</b>
						\$ 1,300,000
COMMUNITY DEVELOPMENT	FY18	FY19	FY20	FY21	FY22	TOTAL
<i>Loan Repayments (Debt Service)</i>						
Sewer Bond - FY06	\$ 170,427	\$ 161,377	\$ 157,447	\$ 153,577	\$ 149,677	\$ 792,505
DEP CWSRF pt1	446,172	445,665	445,148	444,620	444,081	\$ 2,225,686
DEP CWSRF pt2	97,171	97,171	97,171	97,171	97,171	\$ 485,853
MWRA I/I (2012)	111,881	-				\$ 111,881
CWSRF (2012)	142,531	142,554	142,577	142,601	142,625	\$ 712,888
<b>Sub Total</b>	<b>\$ 968,182</b>	<b>\$ 846,766</b>	<b>\$ 842,343</b>	<b>\$ 837,969</b>	<b>\$ 833,554</b>	<b>\$ 4,328,813</b>
						\$ 4,328,813
<b>TOTAL</b>	<b>\$ 2,028,387</b>	<b>\$ 940,016</b>	<b>\$ 1,029,768</b>	<b>\$ 1,032,969</b>	<b>\$ 915,754</b>	<b>\$ 5,946,893</b>
						\$ 5,946,893



## Department of Public Works

### **WATER SYSTEM IMPROVEMENT PROGRAM PROGRESS REPORT FOR FISCAL YEAR 2016**

The former Board of Water Commissioners, now the Water Advisory Board, after a competitive process, selected Weston and Sampson Engineers, Inc. to perform a comprehensive evaluation of the water distribution system which serves the Town. The primary focus of the study was the water distribution system and its: age, condition, chronic water main break events and persistent water quality concerns. The study concluded that considerable work was necessary to correct problems and deficiencies and to ensure a continued supply of safe, clean drinking water to our customers with adequate quantities of water for fire protection both now and into the future. To achieve these goals, Weston and Sampson recommended that all unlined cast iron water main be replaced with a new, larger diameter, cement lined ductile iron pipe. Unlined cast iron pipe comprised approximately 41% of the system which serves about 60% of the population of Belmont. Considering system wide pipe age and condition and economic factors, it was recommended that this work be done in increments with a completion date 30 years after commencement. This plan was approved and initially funded by the 1995 Town Meeting. The 30 year plan is known as The Water System Improvement Program. This program is guided by a 20 year capital plan and currently funded with a combination of utilizing the Massachusetts Water Resources Authority (MWRA) Local Pipeline Assistance Program (LPAP), Local Water System Assistance Program (LWSAP), which both are no-interest loan funds, Municipal Bonds and an annual budget appropriation.

The Department of Public Works Water Division is pleased to present this progress report of program:

#### Fiscal Year 2016 – “ Clifton Street, Bartlett Ave, Winslow Road, Palfrey Road”

Bid Opening: September 3, 2015

Status: Under Construction

Contract Award: Cedrone Trucking Inc

Contract Length: October 2015 – August 2016

Construction Contract Bid: \$1,299,766.48

Program Final Cost: Currently Under Construction

Extent: Clifton Street: Beatrice Circle to Rutledge Road  
Clifton Street: Rutledge Road to Rockmont Road  
Clifton Street: Rockmont Road to Prospect Street  
Bartlett Ave: White Street to Harriet Ave  
Winslow Road: Hammond Road to Palfrey Road  
Palfrey Road: Gilbert Road to Common Street  
Payson Terrace: Payson Road (East) to Payson Road (West)  
Glendale Road: Common Street to Orchard Street  
Winter Street: Concord Ave to Country Club Lane

Fiscal Year 2016 – “ Clifton Street, Bartlett Ave, Winslow Road, Palfrey Road” water main project when completed, will replace approximately 8,600 linear feet of unlined cast iron pipe with new 8,10 and 12 inch ductile iron cement lined pipe along with 22 new fire hydrants, 91 isolation valves and the transfer of 180 water services and abandonment of existing water mains and all appurtenant work within the project limits.

Since the inception of the Water System Improvement Program in 1995, approximately 25.52 miles of water main will have been replaced after the completion of the FY16 project by larger diameter ductile iron cement lined pipe with a service life expectancy of about 100 years. The Water System Improvement Program is intended to replace and upgrade 38 miles of water main out of a total of 91 miles of pipe.

June 7, 2016

Dear Fellow Town Meeting Members:

I am writing to you to explain my reasons for sponsoring a Citizens' Petition to place Article 19 on this year's Annual Town Meeting Warrant. The motion for Article 19 reads as follows:

**Moved: That the Town vote to transfer \$1,100,000 from unreserved fund balance (free cash) to the General Stabilization Fund. (*Two-Thirds vote*)**

The impetus for this article was the override passed by Belmont's voters last year, the assumptions and forecasts on which that vote was based, and the commitments we made for managing the resulting revenues. In proposing a \$4.5 million override, Belmont's leadership committed to managing the additional revenues carefully so as to extend the override's impact as far into the future as possible, thus delaying the potential need for a further override. Toward this end, Town Meeting voted last year to appropriate \$1.674 million in override funds not needed in FY16 into the General Stabilization Fund, essentially banking this money to help support future budgets. In addition, voters were assured that, should the Town's fiscal position turn out to be better than was forecasted, any additional funds not immediately needed would be similarly set aside for future use.

The purpose of Article 19 is simply to fulfill that promise. Fiscal Year 2015, which ended last June 30, in fact produced results far better than had been forecasted when the override was approved. Revenues were forecasted to be \$95.3 million, but instead came in at \$97.7 million, some \$2.4 million higher; and expenditures, budgeted at \$96.3 million, actually totaled \$94.9 million, or \$1.4 million less than had been estimated. This combined difference of \$3.8 million was the primary reason that Belmont's Certified Free Cash balance was replenished to \$7.6 million as of July 1, 2015.

This year, Town Meeting is being asked to appropriate Free Cash to several critical uses: \$1.7 million to support the FY17 operating budget; \$316,000 to the OPEB Stabilization Fund; and \$1.45 million to purchase modular classrooms for the Chenery Middle School. These appropriations leave \$4.1 million. Our guidelines call for \$3.0 million of this amount to remain in Free Cash. Article 19 proposes to transfer the remaining \$1.1 million to the General Stabilization Fund, to set this money aside to meet future needs as we did with the \$1.674 million last year.

The \$1.1 million in question are truly excess funds. Not only does the proposed transfer accommodate the Free Cash appropriations identified above, but it also does not in any way impact the allocations to the operating and capital budgets that were envisioned when the override was passed. Both the FY16 and FY17 Town and School budgets have been in line with the amounts forecasted by the Financial Task Force; and the planned annual investments in Belmont's roads (\$300,000) and sidewalks (\$200,000) have been fully funded.

The General Stabilization Fund is not restricted to any particular purpose -- this money will still be available to meet any critical spending needs that may arise. At the same time, placing the \$1.1 million into the Fund means that any future appropriation of this money will need to be approved by a two-thirds majority of Town Meeting Members. It signifies our intention to conserve these funds as much as possible to support future operating budgets and increases the likelihood that they will in fact be available when needed for that purpose.

I hope you will agree with me that Article 19 is an important step both to safeguard Belmont's fiscal health and to keep the promises we made to voters to manage their money wisely, and I ask for your support for Article 19.

Thank you for your consideration,

Bob Sarno  
TMM, Precinct 3





## MODERATOR'S MESSAGE ON TOWN MEETING PROCEDURES

Belmont's Town Meetings are conducted in accordance with the Massachusetts General Laws, our Representative Town Meeting statute, the General Bylaws, and traditional customs and practices that we have followed for many years, with guidance provided by the principles and rules of conduct in *Town Meeting Time, a Handbook of Parliamentary law*. Several matters of procedure are summarized below.

- An **article** in the Warrant provides notice to the Town Meeting of a matter to be considered. The article itself is not a specific proposal for action. A **motion** is a proposal for action by the Town Meeting and must be within the scope of the notice provided by an article in the Warrant. An article may not be amended but a motion may be amended by vote of the Town Meeting.
- Formal seconding will not be required on **main motions** under articles in the warrant. Seconding will be required on all other motions.
- All **main motions and proposed amendments** involving the expenditure of money must be in writing. All other motions and proposed amendments must also be in writing unless they are brief and simple as to be easily understood when stated orally.
- All substantive amendments and motions to be offered under an article in the Warrant must be submitted to the Town Clerk in writing not later than the close of business on the third (3<sup>rd</sup>) business day before the commencement of the session at which the Article is considered, in order to provide sufficient time for review by Town Counsel and the Moderator and to be made available for distribution to the Town Meeting Members before the commencement of such session. The Moderator may allow exceptions to the advance filing requirement in case of motions that are easy to understand, but such exceptions are within the exclusive discretion of the Moderator.
- Except for motions involving the expenditure of money or Bylaw amendments, the Moderator will first recognize the maker of the motion, if he or she wishes to speak.
- Before commencing discussion on motions involving the expenditure of money or Bylaw amendments, the Moderator will first call for committee reports as follows:
  - **Expenditure of Money** – Warrant Committee,
  - **Capital Improvements** – Warrant Committee, then Capital Budget Committee,
  - **General Bylaw amendments** – Bylaw Review Committee,
  - **Zoning Bylaw amendments** – Planning Board.
- Town Meeting Members wishing to speak should come to a microphone. When recognized by the Moderator, the Member should state his or her name and precinct number before commencing.
- Registered voters of the Town who are not Town Meeting Members may speak at the Town Meeting, but first must either arrange in advance with the Moderator for recognition or arrange to be introduced by a Town Meeting Member.

- Persons who are not Town Meeting Members may be admitted to the floor by invitation **but may not vote.**
- All discussion must be relevant to a motion before the town meeting. All speakers must address the Moderator; questions may be asked only through the Moderator. A Town Meeting Member who wishes to make a motion that is debatable must first make the motion and, after it is seconded, if required, the Moderator will recognize the maker of the motion to speak to it. The Moderator will not recognize a motion made at the conclusion of a speech. This, by definition, includes a motion that would terminate debate, such as a motion for the previous question.
- The Moderator will try to recognize Town Meeting Members in the order in which they come to the microphones. While our General Bylaws do not set a time limit for Town Meeting Members when speaking for the first time, the Moderator has established a limit of five minutes. Unless the Town Meeting consents no person may speak more than twice upon any question, except to correct an error or to make an explanation of a previous statement. No person should seek recognition to speak for a second time until others who have not yet spoken have had an opportunity to be recognized. The five-minute limit also applies to those speaking for a second time.
- Section 30-115 of our General Bylaws provides that all votes shall be taken in the first instance by a “yes” or “no” voice vote. If the Moderator is in doubt as to the vote, or if any Town Meeting Member doubts the vote, the Moderator will call for an electronic vote. Any Town Meeting Member may also request a roll call vote; the request must be concurred in by 34 or more additional Town Meeting Members; and the request must be made in connection with final action under an article in the Warrant.
- Our Bylaws require that a Town Meeting Member who wishes to speak on an issue in which he or she or a member of his or her family has a direct financial interest, or in which he or she is engaged as an attorney or consultant, must first disclose this interest to the Town Meeting.
- A motion to reconsider a vote adopted at one session of a Town Meeting may not be made at an adjourned session of the same Town Meeting unless the mover has given notice of his or her intention either at the session at which the vote was passed or by written notice delivered to the Town Clerk by 12 o'clock noon on the first business day following the commencement of the session at which the vote sought to be reconsidered was passed. A two-thirds vote is required for reconsideration; no vote may be reconsidered more than once.
- Action on our general budget article will not be considered final so as to require a two-thirds vote for reconsideration, or any other procedures relating to reconsideration, until all action under that Article has been completed.

Any citizen who has questions about Town Meeting procedures is encouraged to email me at [mike.j.widmer@gmail.com](mailto:mike.j.widmer@gmail.com).

*Michael J. Widmer*  
Moderator



*Office of the Board of Selectmen  
Town of Belmont  
Massachusetts*

[selectmen@belmont-ma.gov](mailto:selectmen@belmont-ma.gov)

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**BOARD OF SELECTMEN**

SAMI S. BAGHDADY, Chair  
MARK A. PAOLILLO, Vice-Chair  
JAMES R. WILLIAMS, Selectman

**TOWN ADMINISTRATOR**

DAVID J. KALE

**ASSISTANT TOWN ADMINISTRATOR**

PHYLLIS L. MARSHALL

April 14, 2016

Dear Town Meeting Members:

Enclosed please find the Warrant for the **Annual Town Meeting** scheduled for 7:00 p.m. on **Monday, May 2, 2016** at the Belmont High School Auditorium.

Should the business of the Annual Town Meeting not conclude on May 2nd, the meeting will be continued to 7:00 p.m. on the following dates, as required:

- May 4, 9, 11 at the Belmont High School Auditorium
- Monday, June 6, 8, 13 at the Chenery Middle School Auditorium

Also enclosed, please find the Warrant for the **Special Town Meeting** scheduled for 7:30 p.m. on **Wednesday, May 4, 2016** at the Belmont High School Auditorium.

As you will see from the attached materials, the Annual Town Meeting Warrant includes nineteen (19) articles. The non-financial articles are contained in Segment A. Information on the financial articles contained in Segment B will be distributed prior to June 1, 2016.

Please be reminded that the Warrant and any additional information can be found in the Town Meeting section of the Town Clerk's web page at [www.Belmont-ma.gov](http://www.Belmont-ma.gov).

The customary Warrant Discussion Night, co-sponsored by the League of Women Voters and the Warrant Committee is scheduled for April 14, 2016 at 7:00 pm at the Beech Street Center.

We look forward to a productive Annual Town Meeting, and thank you for your continued involvement and participation in our Town's legislative process.

Sincerely,

Mark A. Paolillo, Chair  
Sami S. Baghdady, Vice Chair  
James R. Williams, Selectmen

2016 Annual Town Meeting

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**Segment A:**

Belmont High School 7 pm, begins May 2, 2016

**Segment B:**

Chenery Middle School 7 pm, begins June 6, 2016





**TOWN OF BELMONT  
WARRANT FOR 2016 ANNUAL TOWN MEETING  
MAY 2, 2016  
COMMONWEALTH OF MASSACHUSETTS**

Middlesex, ss.

To either of the Constables in said County:

Greetings:

In the name of the Commonwealth of Massachusetts you are required to notify and warn the Inhabitants of the Town of Belmont, qualified as the law requires to vote in elections and Town Affairs, to meet at the Belmont High School Auditorium on **MONDAY, MAY 2, 2016, at 7:00 P.M.**, and to notify and warn the Town Meeting Members to meet and act at said time and place on the following Articles, viz:

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**ARTICLE 1:**

**REPORTS**

To hear the report of the Selectmen and other Town Officers. To hear the report of any Committee heretofore appointed and to act thereon.

*This article accepts the reports of Town departments appearing in the Annual Town Report and allows the Board of Selectmen and other Town officers, boards and committees to report orally to the Town Meeting on appropriate matters not otherwise appearing on the Warrant. This article stays "on the table" throughout the Town Meeting to allow Town officials and committees to report at the call of the Chair..*

**Majority vote required for passage.**

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**ARTICLE 2:**

**AUTHORIZATION TO REPRESENT THE TOWN'S LEGAL INTERESTS**

To see if the Town will authorize the Selectmen to bring and defend actions for and against the Town, to submit any such claims to arbitration and to enter into settlement on account of the same in behalf of the Town, as and when they deem it for the best interest of the Town to do so, or in any way act thereon.

*This is a standard article that authorizes the Board of Selectmen to represent the Town's legal interests and to settle legal claims.*

**Majority vote required for passage.**

---

**ARTICLE 3:**

**ABANDONMENT OF UTILITY EASEMENT**

To see if the Town will vote to abandon an easement for sanitary sewerage and storm drainage originally shown on a plan titled "Samuel Barnard Estate, Belmont Mass" dated December 11, 1922, said portion to be abandoned being shown on a plan entitled "ALTA/ACSM Land Title Survey in Belmont, MA" dated July 21, 2015, by Cliff E. Rober, P.L.S., on file in the Town Clerk's Office, or in any way act thereon.

*This article seeks authorization to abandon an existing utility easement at 112 Trapelo Road, 102-104 Trapelo Road, 489-493 Common Street, 495-501 Common Street and Parcel 207, at the request of the owner.*

Submitted by the Board of Selectmen

The Board of Selectmen will report on this Article.

**Majority vote required for passage.**

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**ARTICLE 4:**

**AMEND GENERAL BYLAWS FOR "DEMOLITION DELAY" §60-320**

To see if the Town will vote to amend Section 60-320 of the Town of Belmont General Bylaws ("Demolition Delay") as follows, or in any way act thereon.

1. By striking, from Subsection B, "Time Limitation", '2016' and replacing it with '2017', so that the Subsection reads:

B. Time Limitation. The provisions of this Section shall be null and void and of no force and effect on and after June 30, 2017.

*This article seeks to amend the General Bylaws to extend the Demolition Delay Bylaw by one year to allow for completion of the Historic District Commission Town-wide survey of historic properties.*

Submitted by the Historic District Commission

The Bylaw Review Committee and Planning Board will report on this Article.

**Majority vote required for passage.**

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**ARTICLE 5:**

**AMEND GENERAL BYLAWS FOR "RESIDENTIAL PROPERTY SNOW REMOVAL" §60-800**

To see if the Town will vote to amend Section 60-800 of the General Bylaws of the Town of Belmont by deleting section 60-800 (I) in its entirety and inserting in place thereof the following section 60-800 (I) or in any way act thereon:



I. Residential property snow removal.

(1) Purpose. Since pedestrians are safer when walking on sidewalks than when walking in the streets used by vehicular traffic, the purpose of this subsection is to encourage owners of residential property to remove the snow, slush, and ice from abutting sidewalks so that sidewalks throughout the Town are safe for use during the winter season, and so that the Town's local services and amenities are reasonably accessible by pedestrians via sidewalks, especially by elderly persons, persons using wheelchairs, persons using carriages to transport children, and students walking to school.

(2) Definitions. For the purposes of this subsection, the following terms shall have the following definitions:

OBLIGATED PERSON

The person responsible for compliance with this subsection pursuant to Subsection I(4).

SIDEWALK

A paved walkway (whether paved with brick, stone, cement, concrete, asphalt, or other impervious material) that is located within the right-of-way of a street that abuts residential property.

(3) Obligations. Snow, slush, and ice shall be removed from the sidewalk, in accordance with the deadlines set forth in Subsection I(5), to a width of at least 36 inches or, if the sidewalk is narrower, for the full width of the sidewalk.

(4) Obligated persons. The owner of record of a residential property abutting a right-of-way in which a sidewalk is located shall be obligated to comply with this subsection within that portion of the right-of-way to which the residential property abuts, unless the owner of record can demonstrate that this obligation has been duly delegated to a responsible person, identified by name and address, by a written agreement signed by the person so delegated or by an express reference to the obligation in a written lease.

(5) Deadlines for removal and treatment.

(a) After the cessation of a weather event that has resulted in snow, slush, or ice on a sidewalk, the snow, slush, or ice shall be removed no later than 8:00 p.m. the following day, and the sidewalk shall be treated with melting compounds, sand, or other grit, as reasonably necessary to inhibit slipping. Regardless of this deadline, obligated persons are encouraged to remove snow, slush, and ice promptly from the full width of the sidewalk in order to minimize the ice formed on the sidewalk when snow or ice melts and refreezes, so that neighbors and others can use the sidewalks as soon as possible.

(b) Treatment of ice that forms on sidewalks shall be accomplished no later than 8:00 p.m. on the day after the ice has formed, but obligated persons are encouraged to treat the ice promptly so that neighbors and others can use the sidewalks as soon as possible.

(c) The deadlines set forth in this subsection shall be extended for obligated persons who are temporarily absent from the residential property for vacations, holidays, hospitalization, and unexpected absences; provided, however, that such obligated persons shall be required to complete their removal and treatment obligations by 8:00 p.m. on the day following the end of their temporary absence.

(6) Rules and regulations. The Board of Selectmen shall adopt rules and regulations further implementing this subsection, including, without limitation, provisions and hearing procedures for exemptions from the requirements of this subsection for obligated persons who are physically unable to perform the obligations themselves and have a bona fide financial hardship; provided, however, that exemptions granted to such obligated persons shall be void if the obligated person causes portions of the residential property to be cleared of snow, slush, or ice for vehicular access from the street.



(7) Fines. Fines for violations of this subsection shall be on the following schedule: first offense: written warning; second offense: \$50; third and successive offenses: \$100 each, to a maximum of \$350 per winter season (October 1 to April 30). In situations where there is more than one obligated person, such fines may be assessed jointly or individually. No more than one fine may be assessed with respect to any single weather event requiring removal or treatment of snow, slush or ice.

(8) Enforcement.

(a) A person who is an enforcing person as defined in Subsection J shall take appropriate action with respect to observed or reported violations of this subsection.

(b) An enforcing person taking cognizance of such a violation shall promptly send the alleged offender a noncriminal written citation thereof by hand delivery or mail, postage prepaid, addressed to the owner of record.

(c) An owner of record who receives a citation pursuant to this subsection shall have 20 days thereafter to pay the applicable fine or to provide to the enforcing person a photocopy of the written agreement or lease used to delegate the obligation to comply with this subsection, in which case the owner of record shall not be responsible for paying any applicable fine, and the enforcing person may dismiss or modify the citation or reissue the citation to the obligated person as is deemed appropriate.

(d) If a citation is not dismissed and the fine is not timely paid, the provisions of Subsection J, other than those establishing penalties, shall be applicable.

(9) Not evidence. Except as required by applicable law, violations of this subsection shall not be admissible as evidence of negligence in any civil proceeding brought by an injured third party against an obligated person, tenant, or owner of record.

*This article seeks only to remove the "sunset" provision from the existing Bylaw and reinsert the Residential Property Snow Removal provision to the General Bylaws to require that owners of residential property with paved sidewalks remove snow and ice within 24 hours to provide safe pedestrian passage. Violations would be subject to a non-criminal fine. The Board of Selectmen will adopt rules and regulations to determine hardship exemptions.*

Submitted by the Board of Selectmen

The Bylaw Review Committee will report on this article.

**Majority vote required for passage.**

---

**ARTICLE 6: RELATING TO THE CONSTRUCTION OF OVERSIZED DWELLING  
UNITS IN THE SINGLE RESIDENCE C ZONING DISTRICTS**

1. To see if the Town will vote to amend Section 1.4, Definitions and Abbreviations, in the definition for 'Grade' by replacing the word 'altered' with 'raised' in the last sentence, as follows:

**Grade** - The average of the ground level adjoining the building at all exterior walls based upon the existing contour lines. Contour lines shall be illustrated on a plan and shall be established



prior to any filling or earth moving/removal activities. The grade shall not be altered-raised more than 12 inches to allow for proper drainage.

2. To see if the Town will vote to amend Section 1.5.4, Nonconforming Single and Two-Family Residential Structures, by inserting:
  - a. The headings 'General Residence Zoning Districts', 'Single Residence C Zoning Districts', and 'All Other Districts', and
  - b. The provisions under the heading for 'Single Residence C Zoning Districts', as follows:

#### 1.5.4 Nonconforming Single and Two-Family Residential Structures

##### General Residence Zoning Districts

In the General Residence Zoning District, as provided in Massachusetts General Law Chapter 40A, Section 6, preexisting non-conforming structures may be extended or altered with a Special Permit by the Planning Board, provided that no such extension or alteration shall be permitted unless there is a finding by the Planning Board that such extension or alteration shall not be substantially more detrimental to the neighborhood than the existing nonconforming structure. Notwithstanding the foregoing, dormers that comply with Section 4.2.2, Linear Requirements, shall be allowed without review by the Planning Board. On lots that do not comply with the minimum area requirements of this Zoning By-Law (including the minimum lot area per dwelling unit), preexisting non-conforming single and two-family structures may not be voluntarily demolished and reconstructed except in accordance with a Special Permit issued by the Planning Board under Section 6D of this Zoning By-Law.

##### Single Residence C Zoning Districts

In the Single Residence C Zoning Districts, a nonconforming single- and two-family residential structure may be reconstructed, extended, altered, or structurally changed upon a determination by the Building Commissioner that such proposed reconstruction, extension, alteration, or structural change does not increase the nonconforming nature of said structure.

The Building Commissioner may issue a Building Permit under the following circumstances:

- 1) An alteration to a structure which complies with all current setbacks, open space, lot coverage and building height requirements but is located on a lot with insufficient area and/or frontage;
- 2) An alteration to a structure which encroaches upon one or more required setbacks, where the alteration will comply with all current setbacks, open space, lot coverage and building height requirements. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements;
- 3) A half-story addition to a nonconforming structure, that will not increase the footprint of the existing structure, create a new dimensional nonconformity or extend an existing dimensional nonconformity, provided that the existing height restrictions shall not be exceeded. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements.

If the proposed reconstruction, renovation, extension, alteration, or structural change does not meet the standards listed above, a Special Permit shall be required from the Board of Appeals.

If the Building Commissioner determines that such proposed reconstruction, extension, alteration, or structural change,

- 1) Increases the gross floor area of the non-conforming structure by more than thirty percent (30%); or,
- 2) Has been altered, extended, reconstructed or structural change made to the exterior of the structure within the past five (5) years beginning on the date of issuance of the most recently issued building permit,

a Special Permit under Section 6D of this Zoning By-Law, where applicable, shall be required from the Planning Board.

A nonconforming single- or two-family structure may be reconstructed after voluntary demolition in accordance with the following provisions:

1. Building(s) as reconstructed shall be located on the same footprint as the original nonconforming structure, and shall be only as great in volume or area as the original nonconforming structure.
2. If the proposed reconstruction would:
  - a. cause the structure to exceed the gross floor area of the original non-conforming structure or
  - b. cause the structure to be located other than on the original footprint,

a Special Permit under Section 6D of this Zoning By-Law, where applicable, shall be required from the Planning Board prior to such demolition.

The Special Permit Granting Authority may grant a Special Permit to reconstruct, extend, alter or change a nonconforming structure if it finds that the reconstructed and enlarged building:

1. is appropriate in scale and mass for the neighborhood, with particular consideration of abutting properties,
2. will not increase the existing nonconforming lot coverage, if it exists, and,
3. will not be substantially more detrimental than the existing nonconforming building to the neighborhood.

For the purposes of this Section, a nonconforming single- and two-family structure shall be defined as a single- and two-family structure on a lot that does not comply with the existing minimum lot area and/or frontage requirements and/or the single- and two-family structure encroaches or otherwise does not comply with one or more setbacks, open space, lot coverage or building height requirements.

### In All Other Districts

In all other districts, nonconforming single and two-family residential structures may be reconstructed, extended, altered, or structurally changed upon a determination by the Building Commissioner that such proposed reconstruction, extension, alteration, or structural change does not increase the nonconforming nature of said structure. The Building Commissioner may issue a Building Permit under the following circumstances:

3. To see if the Town will vote to amend Section 4.2.2, Linear Requirements for Residential Districts, as follows:
  - a. Within the dimensional table create a new row for 'SR-C' by separating it from 'SR-B';
  - b. Under the 'Maximum Building Height, Feet' column, replace '36' with '30'; and,
  - c. Under subsection B. Height, insert an item '2' limiting the ridge to 34 feet and renumber the remaining items accordingly:

RESIDENTIAL DISTRICTS	MINIMUM SETBACK DIMENSIONS FEET			MAXIMUM BUILDING HEIGHT	
	Front	Side	Rear	Feet	Stories
SR-B and SR-C					
➤ Dwelling	25	10	30	36	2½
➤ Other	25	10	25	36	2½
SR-C					
➤ Dwelling	25	10	30	30	2½
➤ Other	25	10	25	30	2½

#### B. Height

2. In the SR-C Districts, the height of a Dwelling or other structure shall not exceed 34 feet to the ridge. Notwithstanding the definition of 'Height' in Section 1.4, the height of a Dwelling or other structure with a flat roof shall not exceed 30 feet to the highest point of the roof.
4. To see if the Town will amend Section 4.2.2, Linear Requirements for Residential Districts, subsection A. Setbacks, by inserting an item '2' and renumber the remaining items accordingly, as follows:

#### A. Setbacks

2. In the SR-C Districts, the placement of ground-mounted outdoor mechanical and fuel storage equipment on a lot shall be subject to the following requirements:
  - a. Not within the front yard - The front yard is defined as the area between a line obtained by extending the front elevation of the dwelling to each of the sidelines of the lot and the front line of the lot;
  - b. Not within the required side or rear setbacks;
  - c. Not within at least 10'-0" of the front elevation; and,
  - d. Screened so that it is not visible from the street or adjacent properties.



5. To see if the Town will vote to amend Section 4.2.2, Linear Requirements for Residential Districts, subsection A. Setbacks, by inserting an item '4' and renumber the remaining items accordingly, as follows:

A. Setbacks

4. Notwithstanding the front setback requirements listed in Section 4.2.2, the front setback for the SR-C Districts shall be the average of the front setbacks of the buildings on the lots contiguous thereto on either side. A vacant lot, a lot occupied by a building set back more than the required minimum, or an intersecting street shall be counted as though occupied by a building set back at that minimum.

Submitted by the Planning Board

The Planning Board and Warrant Committee will report on this Article.

**Two-thirds vote required for passage.**

---

**ARTICLE 7:**

**FY17 COMMUNITY PRESERVATION COMMITTEE BUDGET  
& PROJECTS**

To see if the Town will vote to hear and act on the report of the Community Preservation Committee on the FY2017 Community Preservation budget and, pursuant to the recommendations of the Community Preservation Committee, to appropriate from the Community Preservation Fund, or to reserve amounts in the Community Preservation Fund for future appropriations, for the administrative expenses of the Community Preservation Committee for FY2017; for the acquisition, creation and preservation of open space - including land for recreational use; for the acquisition, preservation, rehabilitation and restoration of historic resources; and for the creation, preservation and support of community housing; Or act in any other manner in relation thereto.

Amount	Project Name	Category	Funding Source
\$228,350	Construction of Intergenerational Walking Path at Clay Pit Pond	Open Space/ Recreation	Open Space/ Recreation Account/Unallocated Account
\$ 80,000	Preserving Belmont's Original Vital Records	Historic Preservation	Historic Preservation Account
\$ 85,000	Digitizing Belmont's Town Meeting Records	Historic Preservation	Historic Preservation Account
\$ 75,000	Town Hall Exterior Railings Improvements	Historic Preservation	Historic Preservation Account
\$ 25,000	Pequossette Park Revitalization	Recreational Land	Open Space/ Recreation Account/Unallocated Account
\$325,000	Winn Brook Tennis Courts	Recreational Land	Open Space/ Recreation Account/Unallocated Account

\$101,300	Allocation of not less than 10 percent of annual revenues in the Community Preservation Fund for Community Housing	Community Housing	Community Housing
\$ 50,650	Appropriations for administrative and operating expenses not more than 5 percent of annual revenues in the Community Preservation Fund	Administration	Administrative Expenses

*This article is a standard article that appropriates funds to support the operations of the Town's Community Preservation Committee and its approved projects. The Community Preservation Fund receives revenues from a 1.5% property tax surcharge to fund the program. The state provides limited matching grant funds to the Town based on the surcharge collections.*

**Submitted by the Community Preservation Committee**

The Community Preservation Committee, Warrant Committee, and Capital Budget Committee will report on this Article.

**Majority vote required for passage.**

**ARTICLE 8:**

**SALARIES OF ELECTED OFFICIALS**

To see if the Town will vote to fix the salary and compensation of each and all the elected officers of the Town, appropriate a sum of money for that purpose, determine how the same shall be raised, or in any way act thereon.

<b>Elected Officials of the Town</b>	<b>Salary</b>
Town Moderator	\$200
Chair of the Board of Selectmen	\$5,000
Selectmen (2)	\$4,500 (each)
Town Clerk	\$91,572
Town Treasurer	\$99,975
Chair of the Board of Assessors	\$3,030
Assessors (2)	\$2,200 (each)

*This is a standard article that fulfills that state law requiring Town Meeting to set the compensation levels and to appropriate the funds necessary for FY17. Please note that Town Meeting establishes and appropriates the compensation of other municipal employees under Article 10.*

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

---

**ARTICLE 9: ENTERPRISE FUNDS FOR WATER AND SEWER AND STORMWATER SERVICES**

To see if the Town will vote to appropriate a sum of money from the accounts classified as an "Enterprise Fund", pursuant to Chapter 44, Section 53F½ of the General Laws for water service, and for sewer and stormwater service; or in any way act thereon.

*This is a standard article to appropriate funds to support the operations of the Town's water and sewer functions from enterprise funds that receive revenues from user fees. Enterprise funds are entirely self-supporting from user fees and do not receive any funding from property taxes.*

The Warrant Committee will report on this Article.

**Majority vote required for passage (two-thirds if borrowing).**

---

**ARTICLE 10: FY17 BUDGET APPROPRIATION**

To determine what sums of money shall be granted to pay Town expenses for the fiscal year beginning July 1, 2016 and to make the necessary appropriations for the same for the support of schools and for other Town purposes; to determine how the same shall be raised, or in any way act thereon.

*This is a standard article that appropriates the Town's FY17 budget, commencing on July 1. The budget consists of several categories of expenditures, each require a separate vote of Town Meeting. Due to uncertainty regarding the amount of state aid, the budget will be heard at the June sessions of Town Meeting. The Warrant Committee Report contains the budget summary and supporting information and will be distributed to Town Meeting Members in advance of the June sessions.*

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

---

**ARTICLE 11: TRANSFER FUNDS TO GENERAL STABILIZATION FUND**

To see if the Town will vote to raise and appropriate, or transfer from unappropriated available funds in the Treasury a sum of money to the General Stabilization fund, or in any way act thereon.

*This is a standard article that seeks the transfer of funds to a general stabilization fund to achieve the Town's financial plan for FY17.*

The Warrant Committee will report on this Article.

**Two-thirds vote required for passage.**

---

**ARTICLE 12: AUTHORIZATION TO TRANSFER BALANCES TO FUND THE FY17 BUDGET**

To see if the Town will authorize the transfer of certain balances on the Treasurer's books and Accountant's books, or in any way act thereon.

*This is a standard article that authorizes the transfer of balances from various sources necessary to achieve the Town's financial plan for FY17 (the General Fund Budget).*

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

---

**ARTICLE 13:****AUTHORIZATION FOR UP-FRONT FUNDS FOR CHAPTER 90  
HIGHWAY IMPROVEMENTS**

To see if the Town will vote to raise and appropriate, or transfer from unappropriated available funds in the Treasury, sums of money for the repair, improvement and construction of highways, said money to be used in conjunction with any money which may be allotted by the Commonwealth for the said purposes, authorize the acceptance of such allotment, determine how the money raised and allotted as aforesaid shall be expended under the provisions of Chapter 90 of the General Laws, and acts in amendment thereof and in addition thereto, or in any way act thereon.

*This is a standard article that seeks to appropriate "up-front" funds that will be reimbursed from state highway aid, referred to as Chapter 90. This aid is authorized by the Legislature through state transportation bond issues. The estimated apportionment will be reported prior to the June sessions of Town Meeting. These funds, when supplemented with capital budget funds, will be used for the Town's Pavement Management Program to extend the life of our roadway system. In addition, the Town has used Chapter 90 funds to "leverage" substantial state/federal funding to design major road projects (i.e., Trapelo Road).*

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

**Majority vote required for passage.**

---

**ARTICLE 14:****APPROPRIATION OF CAPITAL EXPENDITURES**

To see if the Town will vote to appropriate sums of money to purchase public safety equipment, computer equipment (including consulting work), public works equipment and furnishings and equipment for Town facilities, construct public ways, and for building and facility and public works construction, major maintenance and alterations (including design work); to determine whether these appropriations shall be raised by borrowing or otherwise; or in any way act thereon.

*This is a standard article to appropriate funds for capital expenditures. While the article is general as to the categories of capital expenditures, the motion will be explicit. The recommendations of the Capital Budget Committee for FY17 capital expenditures will be distributed to Town Meeting Members prior to the June session of Town Meeting.*

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

**Majority vote required for passage (two-thirds if borrowing).**

---

**ARTICLE 15:****APPROPRIATION OF OTHER POST EMPLOYMENT BENEFITS  
(OPEB) STABILIZATION FUND**

To see if the Town will vote to appropriate, or transfer from available funds in the Treasury, a sum of money to the Other Post-Employment Benefits ("OPEB") Stabilization Fund; and to determine whether the money shall be provided by the tax levy, by transfer from available funds, by transfer from the departmental Enterprise Funds, or by any combination of these methods; or in any way act thereon.



*This article seeks to appropriate from available free cash or other available funds for future Town liabilities for Other Post-Employment Benefits.*

The Warrant Committee will report on this Article.

**Two-thirds vote required for passage.**

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**ARTICLE 16:**

**AUTHORIZATION FOR REVOLVING FUNDS**

To see if the Town will vote, pursuant to Chapter 44, Section 53E½, of the General Laws, to establish new revolving funds; to reauthorize revolving funds established under various previous votes of the Town by various Town Departments, to hear or receive a report concerning the receipts and expenditures of same or to amend the votes under any previously adopted revolving funds, to appropriate a sum of money to fund same, to determine how the money shall be raised or expended; or in any way act thereon.

*This is a standard article that seeks authorization to establish new revolving funds, and to re-authorize existing revolving funds, for certain operations of the Town. These funds allow the expenditure of user fee, receipts for program expenses without further Town Meeting appropriation. However, Town Meeting must annually renew these funds. While this article is general, the motion will specifically include the funds and spending limits in each category.*

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

---

**ARTICLE 17:**

**UNDERWOOD POOL PROJECT BORROWING DE-AUTHORIZATION  
AND APPROPRIATION OF BOND PREMIUM PROCEEDS**

To see if the Town will vote to rescind the unused borrowing authority in the amount of \$112,000 that was appropriated under Article 17 of the May 7, 2014 Annual Town Meeting for the purpose of performing improvements to the Underwood Pool Project; and appropriate the premium paid to the Town upon the sale of bonds issued for the Underwood Pool Project, which are subject of a Proposition 2 1/2 debt exclusion, to pay costs of the project financed by such bonds and to reduce the amount authorized to be borrowed by the same amount, or in any way act thereon.

*This article rescinds the authority to borrow funds that were not needed for improvements to the Underwood Pool Project due to usage of bond premium revenues in place of bond proceeds. The total authorization was approved for \$2,902,000 on Article 17 of the May 7, 2014 Town Meeting.*

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

**Majority vote required for passage.**

---



**ARTICLE 18:**

**CITIZENS' PETITION: OPEB FUND ANNUAL EXPENSE**

To fund OPEB obligations by transferring and appropriating funds from the Town's Free Cash to the Town's OPEB Trust Fund.

*This article is submitted in the exact form as provided by the Citizens.*

Submitted by James R. Williams

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

---

**ARTICLE 19:**

**CITIZENS' PETITION: GENERAL FUND STABILIZATION**

To see if the Town will vote to transfer from unappropriated available funds in the Treasury a sum of money to the General Stabilization Fund.

*This article is submitted in the exact form as provided by the Citizens.*

Submitted by Robert L. Sarno

The Warrant Committee will report on this Article.

**Majority vote required for passage.**

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Given under our hands this 28th day of March, 2016.

**BELMONT - BOARD OF SELECTMEN**

Sami S. Baghdady, Chair

Mark A. Paolillo, Vice Chair

James R. Williams

A True Copy, Attest

Town Clerk of Belmont, MA



12-11-1907 and 12-11-1908  
12-11-1909 and 12-11-1910  
12-11-1911 and 12-11-1912



**MOTIONS**  
**2016 ANNUAL TOWN MEETING**  
**MAY 2, 2016**  
**Draft as of March 30, 2016**  
*(Subject to Change)*

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**PRELIMINARY MOTION**

**ORDER OF THE ARTICLES**

MOVED: That the Town Meeting hear the motions in the following order: *(Majority vote)*

1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17,18,19

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**ARTICLE 1:**

**REPORTS**

MOVED: That the reports of the Selectmen and other Town Officers, departments and committees for the year 2016 be accepted. *(Majority vote)*

MOVED: That Article 1 motion be laid on the table. *(Majority vote)*

---

**ARTICLE 2:**

**AUTHORIZATION TO REPRESENT THE TOWN'S LEGAL INTERESTS**

MOVED: That the Board of Selectmen be, and it hereby is, authorized to bring and defend actions for and against the Town, to submit any such claims to arbitration and to enter into settlement on account of the same in behalf of the Town, as and when they deem it for the best interest of the Town to do so; said power shall be vested solely in the Board of Selectmen. *(Majority vote)*

---

**ARTICLE 3:**

**ABANDONMENT OF UTILITY EASEMENT**

MOVED: That the Town vote to authorize the Board of Selectmen to abandon and release an easement for sanitary sewerage and storm drainage as shown on a plan entitled "Plan Showing Easement for 112 Trapelo Road, 102/104 Trapelo Road, 489-493 Common Street, 495-501 Common Street, and Parcel 207 in Belmont, MA" dated April 5, 2016 and prepared by Rober Survey, said area being a portion of the easement accepted at Town Meeting on December 11, 1922, and described in a grant of easement from Mary B. Horne to the Inhabitants of Belmont dated March 13, 1929 and recorded in the Middlesex South District Registry of Deeds in Book 5337, Page 1. *(Majority vote)*

REPORTING: Board of Selectmen

**ARTICLE 4: AMEND GENERAL BYLAWS FOR “DEMOLITION DELAY” §60-320**

MOVED: That the Town vote to amend Section 60-320 of the Town of Belmont General Bylaws (“Demolition Delay”) as follows:

1. By striking, from Subsection B, “Time Limitation”, ‘2016’ and replacing it with ‘2017’, so that the Subsection reads:  
  
B. Time Limitation. The provisions of this Section shall be null and void and of no force and effect on and after June 30, 2017. *(Majority vote)*

REPORTING: Bylaw Review Committee and Planning Board

---

**ARTICLE 5: AMEND GENERAL BYLAWS FOR “RESIDENTIAL PROPERTY SNOW REMOVAL” §60-800**

MOVED: That under Article 5, the reading of the proposed Amendment to Article 9 of the Town of Belmont General Bylaws pertaining to “Residential Property Snow Removal” be dispensed with, the same having been set forth in full under Article 5 in the Warrant for this Meeting and having been distributed to each Town Meeting Member. *(Majority vote)*

MOVED: That the Town vote to amend the Belmont General Bylaws pertaining to “Residential Property Snow Removal” as set forth in full under Article 5 in the Warrant for this Meeting. *(Majority vote)*

REPORTING: Bylaw Review Committee

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**ARTICLE 6: RELATING TO THE CONSTRUCTION OF OVERSIZED DWELLING UNITS IN THE SINGLE RESIDENCE C ZONING DISTRICTS**

MOVED: That under Article 6, the reading of the proposed Amendment to the Zoning By-Law pertaining to Sections 1.4, “Definitions and Abbreviations”, 1.5.4, “Nonconforming Single and Two-Family Residential Structures” and 4.2.2, “Linear Requirements for Residential Districts”, be dispensed with, the same being set forth in full under Article 6 in the Warrant for this Meeting and having been distributed to each Town Meeting Member. *(Majority vote)*

MOVED: That the Town vote to amend the Zoning By-Law pertaining to Sections 1.4, “Definitions and Abbreviations”, 1.5.4, “Nonconforming Single and Two-Family Residential Structures” and 4.2.2, “Linear Requirements for Residential Districts”, as set forth under Article 6 of the Warrant for this Town Meeting. *(Two-thirds vote)*

REPORTING: Planning Board and Warrant Committee

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**ARTICLE 7: FY17 COMMUNITY PRESERVATION COMMITTEE BUDGET & PROJECTS**

MOVED: That the Town will hear and act on the report of the Community Preservation Committee on the 2017 Community Preservation budget and, pursuant to the recommendations of the Community Preservation Committee, take the following actions:  
That the Town vote to appropriate from the FY17 estimated receipts of \$1,013,000 Community Preservation Fund as follows:

**For Open Space:**

MOVED: a) That \$228,350 be appropriated for the Construction of an Intergenerational Walking Path at Clay Pit Pond. *(Majority vote)*

MOVED: b) That \$25,000 be appropriated for the Pequossette Park Revitalization. *(Majority vote)*

MOVED: c) That \$325,000 be appropriated for the Winn Brook Tennis Courts. *(Majority vote)*

**For Historic Preservation Projects:**

MOVED: d) That \$80,000 be appropriated for the Preservation of Belmont's Original Vital Records. *(Majority vote)*

MOVED: e) That \$85,000 be appropriated for the Digitizing of Belmont's Town Meeting Records. *(Majority vote)*

MOVED: f) That \$75,000 be appropriated for the Town Hall Exterior Railings Improvements. *(Majority vote)*

**For Affordable Housing:**

MOVED: g) That \$101,300 be appropriated for Affordable Housing. *(Majority vote)*

**And**

MOVED: h) That \$50,650 be appropriated for the FY17 Community Preservation Committee Administrative Expenses. *(Majority vote)*

REPORTING: Community Preservation Committee, Warrant Committee, and Capital Budget Committee

RECEIVED  
TOWN CLERK  
BELMONT, MA

2016 APR -8 PM 2:30

**PLANNING BOARD ZONING FORUM**  
**ZONING AMENDMENT TO THE SINGLE RESIDENCE C ZONING DISTRICTS**  
Article 6 – Annual Town Meeting

In anticipation of the Annual Town Meeting, the Planning Board will hold a **Zoning Forum on Article 6, 'Relating to the Construction of Oversized Dwelling Units in the Single Residence C Zoning Districts'**, on TUESDAY, APRIL 12, 2016, in the BOARD OF SELECTMEN'S MEETING ROOM, Town Hall, 455 Concord Avenue, at 7:00 pm.

Last year, a citizens' petition moratorium restricted the height of new structures to a total of thirty-two (32) feet, as measured from the average grade to highest point of the roof (ridge) for a portion of the Single Residence C Zoning Districts was adopted by Town Meeting. This petition was the result of the citizens' concerns about the construction of significantly larger homes without regard for the surrounding built environment. This moratorium expires on June 30, 2016.

Throughout this past year, the Board studied the issues surrounding the construction of new structures and drafted Article 6, 'Relating to the Construction of Oversized Dwelling Units in the Single Residence C Zoning Districts', in response. This zoning amendment is meant to protect and preserve the character and the quality of life in Belmont while giving due weight to the interests of property owners. .

At this Forum, the Planning Board will explain the zoning amendment and residents of the Town have an opportunity to ask questions about it. Please come, listen and ask questions.

If you want additional information about the Zoning Forum, please contact Jeffrey Wheeler, Senior Planner, at 617-993-2666 or [jwheeler@belmont-ma.gov](mailto:jwheeler@belmont-ma.gov).

**You are invited to attend**

# **Warrant Briefing**

**Thursday, April 14<sup>th</sup>, 2016**

**at 7:00 PM**

**Beech Street Center**  
**266 Beech Street**

**Opportunity to ask questions about**  
**Warrant Articles**

**prior to**

**May 2<sup>nd</sup> Annual Town Meeting**

**Town Officials and Department Heads**  
**will be present to provide information**

**Michael Libenson**

**Chair of the Warrant Committee will preside**

**Cosponsored by:**

**the Warrant Committee**

**and the**



**Belmont League of Women Voters®**  
**Education Fund**







OFFICE OF COMMUNITY DEVELOPMENT  
TOWN OF BELMONT

19 Moore Street  
Homer Municipal Building  
Belmont, Massachusetts 02478-0900

Telephone: (617) 993-2650 Fax: (617) 993-2651

Building Division  
(617) 993-2664  
Engineering Division  
(617) 993-2665  
Planning Division  
(617) 993-2666

Memorandum

To: Town Meeting Members  
From: Belmont Planning Board  
Date: April 7, 2016

RECEIVED  
TOWN CLERK  
BELMONT, MA  
2016 APR - 8 AM 8:01

RE: Planning Board's Report to the 2016 Annual Town Meeting

Pursuant to the requirements of Massachusetts General Laws, Chapter 40A, Section 5, the Planning Board hereby provides the following recommendations on the zoning amendment that will appear before the 2016 Annual Town Meeting. Sitting for the Board were Liz Allison, Chair, Barbara Fiacco, Vice Chair, Charles Clark, Joseph DeStefano, Karl Haglund, and Raffi Manjikian, associate member. A brief overview of the zoning amendment, the reasons for it and the Board's recommendation to the Town Meeting are provided below.

Additionally, the Planning Board also deliberated and voted on the one-year extension amendment to the Demolition Delay General Bylaw. While this is an Historic District Commission article, the Board participated in drafting the existing bylaw. The Board's recommendation on this amendment to the Town Meeting is provided below as well.

Article 6 – Relating to the Construction of Oversized Dwelling Units in the Single Residence C Zoning Districts

Last year a Citizens Petition Moratorium limiting the height of new structures to thirty-two (32) feet to the highest point of the roof (ridge) in a portion of the Single Residence C Zoning District (known as the Shaw Gardens and Hittinger Farm Overlay District) was adopted by Town Meeting. This Moratorium, which expires on June 30, 2016, was the result of citizens' concerns about the construction of oversized dwelling units in their neighborhood without regard for the surrounding built environment. Last August, the Planning Board began examining the issues surrounding these new buildings and concluded that the buildings were out of scale, had greater mass and height, and were set further back from the street than abutting houses. It also observed that outdoor mechanical equipment was installed close to abutting homes. Upon further review, the Board discovered that these issues affected all of the Single Residence C Zoning Districts. As a result, the Board drafted a zoning amendment to reduce the mass and height and to insure

that any new structure (both large additions and new homes) blends with the built environment. To achieve this, the proposed amendment applies to all Single Residence C Zoning Districts and contains five (5) parts: It allows the grade to be lowered, limits nonconforming construction, reduces allowed height, requires front setbacks to align with adjacent homes and limits location of outdoor mechanical equipment.

More specifically, the amendment establishes criteria for new homes and large additions on nonconforming lots (less than 9,000 square feet and 75 feet of frontage). New homes and additions that increase the gross floor area by more than 30% will require a Special Permit from the Planning Board. Additionally, the height of new structures will be limited to 30 feet at the midpoint and 34 feet at the ridge, the front setback will align with adjacent homes. The installation of HVAC and other mechanical equipment will be prohibited in front yards (the area between a line obtained by extending the front elevation of the dwelling to each of the sidelines of the lot and the front line of the lot) and side and rear setbacks and will require appropriate screening.

The Board held a series of public hearings beginning on February 23, 2016 and continued to March 2, 15 and 22. The Citizen sponsors participated in the hearings and supported the proposed amendments. At the conclusion of the public hearing, the Board deliberated on the zoning amendment and voted unanimously **to recommend favorable action by Town Meeting on the amendment relating to the construction of oversized dwelling units in the Single Residence C Zoning Districts.**

**Article 4 – Amend General Bylaws for “Demolition Delay” §60-320**  
**One-Year Extension**

The Historic District Commission (HDC) seeks to amend the Demolition Delay General Bylaw by extending it for one year. This Bylaw expires June 30, 2016. According to the HDC, the extension will allow HDC to complete an historic building inventory (funded by CPA) that will be used to revise the list of buildings subject to the Bylaw. The additional year allows the HDC to complete the inventory and for stakeholders, such as the Planning Board, time to review it. The Board deliberated on the amendment and voted unanimously **to recommend favorable action by Town Meeting on the One-Year Extension amendment to the Demolition Delay General Bylaw.**

If you have any questions regarding the zoning amendment, please do not hesitate to contact Jeffrey Wheeler, AICP, Senior Planner, at 617-993-2666 or at [jwheeler@belmont-ma.gov](mailto:jwheeler@belmont-ma.gov).

Thank you.



## Belmont Citizens for Responsible Zoning

---

April 6, 2016

Dear Town Meeting Member,

One year ago Belmont Citizens for Responsible Zoning placed an article on the Warrant for the 2015 Annual Town Meeting. Our Citizens' Petition reflected the concerns of Belmont residents about the construction of oversized dwellings in their neighborhoods. Town Meeting members listened to a presentation by our group and, after thoughtful discussion, approved our motion 238 to 24. As a result, a total height limit of thirty-two (32) feet was placed on construction, reconstruction, or modification of any detached single-family dwelling unit in a small portion of Belmont's Single Residence C Zoning District for one year. The moratorium will expire on June 30, 2016.

For the past year, members of our group have worked collaboratively with the Belmont Planning Board to develop Zoning By-Law amendments that will mitigate the effects of oversized construction throughout the Single Residence C Zoning District. We are pleased to endorse the proposed changes and additions spelled out in Article 6 on the Warrant for the 2016 Annual Town Meeting. The measures developed by the Planning Board are intended to help preserve the character of Belmont's Single Residence C neighborhoods without unduly restricting the efforts of homeowners and developers to expand and improve their property. Article 6 requires a two-thirds vote for passage, and we respectfully ask for your support.

Thank you,

Belmont Citizens for Responsible Zoning Steering Committee

Steve Pinkerton

Peg Callanan

Carol Moyles

Chris Moyles

Nick Candee

# **Annual Town Meeting 2016**

**Community Preservation Committee**

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## COMMUNITY PRESERVATION COMMITTEE

Margaret Velie, Conservation Commission (Chair)  
Anne Marie Mahoney, Board of Selectmen Appointee (Vice Chair)  
Floyd Carman, Board of Selectmen Appointee (Floyd Carman)  
Liz Allison, Planning Board  
Anthony Ferrante, Recreation Commission  
Lisa Harrington, Historic District Commission  
Gloria Leipzig, Housing Authority  
Andrés Rojas, Board of Selectmen Appointee  
Jim Williams, Board of Parks Commissioners

April 7, 2016

Dear Town Meeting Member,

The enclosed information summarizes the status of the past three years of Town Meeting approved projects and describes the six projects which Belmont's Community Preservation Committee (CPC) is recommending to Town Meeting for funding under the State's Community Preservation Act (CPA) in FY 2017. Detailed project descriptions and expense summaries for all Town Meeting approved projects can be found on the CPC webpage on the Town of Belmont website:

<http://www.belmont-ma.gov/community-preservation-committee>.

Town Meeting has the final vote on funding these recommendations. According to CPA legislation, Town Meeting actions on recommendations are limited to the following:

- May approve, reduce or reject recommended amounts.
- May reserve all or part of amount recommended for specific project to applicable reserve.
- May not increase recommendations or initiate appropriations from fund monies.

This is the fourth year the CPC will make funding recommendations to Town Meeting, and we welcome questions and suggestions. Please contact [fcarman@belmont-ma.gov](mailto:fcarman@belmont-ma.gov) or [mtrainor@belmont-ma.gov](mailto:mtrainor@belmont-ma.gov) or call our hotline at (617) 993-2774.

Copies of this document will not be available at Town Meeting, so we encourage you to bring this packet with you at the May 2016 session or contact the CPC in advance to schedule a time to pick up a hardcopy.

We look forward to discussing these recommendations with you at Town Meeting.

Margaret Velie, Chair  
Community Preservation Committee

# Overview of the CPA in Belmont

## Recommended Community Preservation Act Funding for FY 2017

The Community Preservation Committee (CPC) is recommending six projects to the 2016 Annual Town Meeting for funding. Described In the following pages, each of these projects was evaluated by the CPC in light of the articulated criteria for eligibility and appropriateness under the Community Preservation Act (CPA). The projects have been presented at a public hearing held on November 12, 2015 and at a League of Women Voters meeting on April 27, 2016.

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### Community Preservation Act

The CPA is a state statute which individual communities in the Commonwealth may choose to adopt; Belmont adopted the statute at the State election held November 2, 2010. CPA communities impose a surcharge on their own property taxes of up to 3%, and funds raised from the surcharge are restricted to use for projects in four categories: community housing, historic resources, open space and recreation. To support expenditures in these areas, the state provides partial match of the funds raised by the community surcharges.

Belmont elected a 1.5% surcharge on both residential and commercial taxpayers. Mindful of the burden on homeowners, however, the Town also adopted provisions which exempt the first \$100,000 of residential property values from the surcharge, and grant a total exemption from the surcharge to lower income residents. In 2016, the annual surcharge averaged \$156.00 per Belmont single family household.

The State match, originally 100%, has declined since 2006 as additional communities have adopted the statute and joined the funding pool, and as registry of deed fees which feed the State fund have suffered in a weak economy. The match is currently estimated at 18%. On average, Belmont generates approximately \$1.2 million of CPA funding annually.

Revenue	CPA COLLECTION				
	FY12	FY13	FY14	FY15	FY16 (Estimated)
Surcharge	\$ 858,359.01	\$ 890,298.66	\$ 917,630.41	\$ 963,354.88	\$ 1,013,000.00
Surcharge - Subsequent Year Collection	\$ -	\$ 6,358.84	\$ 7,325.91	\$ 6,204.44	\$ -
State Match	\$ -	\$ 232,884.00	\$ 470,418.00	\$ 291,615.00	\$ 288,337.00
<b>TOTAL</b>	<b>\$ 858,359.01</b>	<b>\$ 1,129,541.50</b>	<b>\$ 1,395,374.32</b>	<b>\$ 1,261,174.32</b>	<b>\$ 1,301,337.00</b>

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## **Community Preservation Committee**

The CPA requires each adopting community to appoint a Community Preservation Committee. By statute, the CPC consists of nine members, of whom three are appointed by the Board of Selectmen as at-large members and six are appointed by the following boards and commissions: Parks Commissions (the Board of Selectmen in Belmont), Conservation Commission, Historic District Commission, Housing Authority, Planning Board, and the Recreation Commission. Currently Margaret Velie serves as Chair of the CPC and Anne Marie Mahoney serves as Vice-Chair.

The CPC is responsible for reviewing applications for funding under the CPA and recommending to Town Meeting expenditure of CPA funds on those projects it approves each year. All funding decisions by the CPC were made within the framework of the Community Preservation Plan, which was approved by the CPC on August 14, 2013. The Community Preservation Plan was last updated on June 19, 2015 following the 2015 Annual Town Meeting.

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## FY17 CPA Project Summaries

Proposed FY17 Projects	Recommended Appropriation	
Construction of Intergenerational Walking Path at Clay Pit Pond	\$	228,350
Preserving Belmont's Original Vital Records	\$	80,000
Digitizing Belmont's Town Meeting Records	\$	85,000
Town Hall Exterior Railings Improvements	\$	75,000
PQ Park Playground Project	\$	25,000
Winn Brook Tennis Courts	\$	325,000
TOTAL	\$	818,350.00

<b>Project:</b>	<b>Construction of Intergenerational Walking Path at Clay Pit Pond</b>
<b>CPA Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$228,350</b>
<b>Amount Recommended:</b>	<b>\$228,350</b>
<b>CPC Vote:</b>	<b>8/8 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Mary Trudeau Belmont Conservation Commission</b>

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## **Project Description**

Construction of an Intergenerational Walking Path at Clay Pit Pond

## **Project Goals and Objectives**

The project will create a 2500 linear foot walkway through the 13.5 acres of parkland on the south side of Clay Pit Pond. The path will provide fully handicapped accessible paths linking the Clay Pit Pond water feature; an expanded Veterans Memorial; the Ruth Ippen arboretum; and proposed educational kiosks and sitting areas. The current earthen path will be replaced with a 6 to 8 foot wide, permeable stone surface incorporating subsurface engineering to improve the existing drainage issues and extend the seasonal use of the walking path.

The 2015 master plan for the site, developed through a 2014 CPA grant, harkens back to the original Loring Underwood landscaping plan prepared for the Town, in 1928. The 1928 plan was implemented as a W.P.A. project, and incorporated iconic design elements, many of which have been preserved in the 2014 plans. The proposed path design echoes the forms and materials used by Underwood in the original design. The plan for the pathways incorporates a tribute to the original brickyard origins and historic dimensions of the Clay Pit Pond through the use of brick at specified points along the proposed, permeable walking surface.

## **Project Benefit**

The development of the Clay Pit Pond Park provides a unique opportunity for the development of a multi-generational, fully accessible, recreational facility. The proposal will work to create enhanced social connections; physical fitness opportunities; and passive recreational opportunities for a wide range of users while improving the environmental impacts of the current paths. The current walkways, while beloved and well used, are not handicap accessible, and the generally poor condition of the current paths often precludes safe, dry foot traffic through the park. The proposed strategic realignment and rehabilitation of the current path system will be an environmentally sensitive improvement, and will improve the quality of runoff discharged to the Clay Pit Pond.

Additional proposed work at the park, including the creation of vistas and views of the waterbody; the control and management of invasive plant species; restoration of historic plantings and garden areas; installation of kiosks and the expansion of the Veterans Memorial provide opportunity for private funding, community engagement and service. Development of the pathway is a critical component of future improvements, many of which can be done through private donations and community service opportunities.

<b>Project:</b>	<b>Preserving Belmont's Original Vital Records</b>
<b>CPA Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$80,000</b>
<b>Amount Recommended:</b>	<b>\$80,000</b>
<b>CPC Vote:</b>	<b>8/8 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Ellen Cushman</b>
	<b>Town of Belmont - Town Clerk</b>

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### **Project Description**

Conservation of the original vital records of births, deaths and marriages in Belmont that was started as the last component of our FY13 CPA project to digitize and preserve the original vital records is not complete. This project is a second phase of the work, to conserve and preserve the original records themselves. Additional phases of this work will continue to be proposed in the future.

The Town Clerk is responsible for creating and archiving the records of the Town since its incorporation in 1859, including, but not limited to, vital records of births, deaths and marriages. Vital records are created and recorded daily by the Town Clerk's staff. The proper preservation of and access to these fragile original records is a major thrust for the Dept of Public Health for the Commonwealth as well as every town and city in the Commonwealth. The Belmont archive is the only source for decades of these documents. We must preserve and conserve these individual vital record documents (birth certificates, death certificates, marriage certificates) to halt further degradation of the paper documents in addition to making digitizing them (our original FY13 CPA project). We will prioritize the work based upon the Item-By-Item Conservation Survey that has been performed.

### **Project Goals and Objectives**

Our original FY13 project consisted of four phases:

- a. Conduct an item-by-item survey of the original bound books to prepare an action plan for preserving the records and books
- b. Digitize and index the vital records from Microfilm into a searchable database
- c. Digitize and index the vital records from paper books into a searchable database
- d. Select books to begin the preservation of the original documents per the preservation survey; engage a vendor to conduct the prescribed preservation

We have completed parts a through c above and have begun work on item d. This FY17 project would be to continue the work of part d, above, preserving the original records..

### **Project Benefit**

These are the VITAL records of Belmont's people. They cannot be permitted to degrade and disappear. Daily, the Town Clerk's office sells certified copies of our birth, death and marriage certificates for a fee to individuals required to produce them for other agencies, such as insurance, Social Security, State Department, Homeland Security, FEMA, Mortgages, State agencies such as the Registry of Motor Vehicles or Family Services, school registrations, health insurance, etc. In FY15, the fees for these documents alone amounted to more than \$35,000 of Revenues, some 1800 individual documents produced. Our FY13 project allowed us to limit the handling of the books reducing wear from now into the future. However, we must stop the degradation of the original documents so they are not lost for generations of Belmontians to come.

## ARTICLE

<b>Project:</b>	<b>Digitizing Belmont's Town Meeting Records</b>
<b>CPA Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$85,000</b>
<b>Amount Recommended:</b>	<b>\$85,000</b>
<b>CPC Vote:</b>	<b>8/8 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Ellen Cushman</b>
	<b>Town of Belmont - Town Clerk</b>

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### **Project Description**

Scanning and digitizing paper Town Meeting records and transcripts from 1859 to present; indexing to permit easy search of Town Meeting actions. Indexing fields into database system (existing software as used for Vital Records digitization project). Application of Optical Character Recognition.

### **Project Goals and Objectives**

The primary goal for this project:

To digitize the images of the Town Meeting and Annual Report documents from their many forms, and index them topically into the existing PaperVision database software the Town Clerk's office licenses for managing our vital records, our first CPA project. Indexing by topic will make them accessible and usable to the Town Clerk's staff utilizing the existing database software, cutting the research time certainly, but more importantly, it will allow the staff to obtain a complete picture of all the transactions or items involving that topic, instead of a lucky subset.

A future phase of this project could make the index and/or images of documents available to the general public via the internet so individuals can conduct some level of the research of public documents themselves.

### **Project Benefit**

The project supports ALL Town plans and decisions by providing facts and context of our governmental decisions, those past, present and future. Managing public records and responding to public records requests is a significant task within the responsibility of the Town Clerk, by Mass General Laws and the Town's Bylaws. Many legal actions and financial decisions of the Town require in depth research.

<b>Project:</b>	<b>Town Hall Exterior Railings Improvements</b>
<b>CPA Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$75,000</b>
<b>Amount Recommended:</b>	<b>\$75,000</b>
<b>CPC Vote:</b>	<b>8/8 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Gerald R. Boyle</b>
	<b>Town of Belmont - Facilities Dept</b>

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### **Project Description**

The exterior historical ornamental iron railings system on the Concord Avenue side of Town Hall has fallen into significant disrepair. The two upper portions of the railing system are of a condition where refurbishment consisting of a thorough grinding, priming and repainting can bring them to a suitable finish. The lower portion of the railing measures 40 feet in length. This section of railing is significantly deteriorated, rendering it in need of replacement rather than refurbishment. The project will attempt to replace this section with new, historically accurate ornamental iron railing in the same location, and of the same style.

### **Project Goals and Objectives**

- 1) To historically preserve the assets of the Town
- 2) To maintain the functionality of the railing system
- 3) To improve the overall aesthetics of the railing system and other ornamental iron items at the Concord Avenue entrance

### **Project Benefit**

These improvements will make the asset functional for intended use, protecting it from further deterioration.

## ARTICLE

<b>Project:</b>	<b>PQ Park Playground Project</b>
<b>CPA Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$25,000</b>
<b>Amount Recommended:</b>	<b>\$25,000</b>
<b>CPC Vote:</b>	<b>9/9</b>
<b>Sponsors:</b>	<b>Julie Crockett</b> <b>Friends of PQ Park</b>

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### **Project Description**

The Friends of Pequossette Park are requesting \$25,000 of Community Preservation Act funds for Phase 1 of the PQ Revitalization Project. At the recommendation of the Community Preservation Committee, the Project has been divided into two phases. The \$25,000 CPA funds applied for in Phase 1 will go towards an Existing Conditions Survey costing no more than \$5000, as well as approximately \$20,000 to hire a Landscape Architecture firm (including landscape architects and civil engineers) to perform all phases of a design for approximately \$20,000. The Landscape Architecture (including landscape architects and civil engineers) firm will complete all phases of the design for the ~1 acre playground portion of PQ Park: (a) Preliminary Design, (b) Construction Documents, (c) Bidding and Award, and (d) Construction Administration. It is anticipated that Friends of PQ Park will apply for additional CPA Funding in a subsequent year for Phase 2, which will focus on implementation and construction for bringing the finalized design to fruition. Design and survey costs on average are typically 10% of construction costs. Thus, with a design and survey cost of \$25,000, a preliminary estimate for the amount Friends of PQ would request in Phase 2 would be around \$250,000.

### **Project Goals and Objectives**

At just over 7.5 acres, PQ Park provides recreational space for youth and adult sports programs, such as soccer, baseball, softball, tennis, and basketball, as well as open space for walkers, joggers, families, preschoolers, friends, dogs and social groups to gather and play. But as anyone who has been to PQ Park is aware, many aspects of the ~1 acre Playground area within the 7.5 acre park are in a state of disrepair. The play area is also prone to flooding during storms, leaving standing water under the swings and around the playground structures for days at a time. Friends of PQ Park are planning for a number of equipment upgrades, safety enhancements, and additional amenities to PQ Park. These include the replacement of the playground and park equipment that is currently broken, outdated, or does not meet current safety standards, as well as converting underutilized space in the southwest corner of the park into active recreational space that is accessible to the community.

### **Project Benefit**

A revitalized PQ Park could attract an even more diverse group of users from a wider demographic, in addition to better serving its current community. In order to achieve this mission we need safe, well equipped and age appropriate play structures and high quality recreation space. While we ask for CPA funds to make the project possible, FPQ plans to maintain a small budget and work closely with DPW to keep our beloved park in excellent condition for many years to come.

<b>Project:</b>	<b>Winn Brook Tennis Courts</b>
<b>CPA Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$325,000</b>
<b>Amount Recommended:</b>	<b>\$325,000</b>
<b>CPC Vote:</b>	<b>5/8 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Jay Marcotte</b>
	<b>Town of Belmont - DPW</b>

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### **Project Description**

The proposed project is to completely remove and replace the four (4) tennis courts at the Winn Brook Playground.

### **Project Goals and Objectives**

The goal is to build a new athletic facility and the objective is to properly maintain the asset so that the community as a whole can enjoy for 20-30 years.

### **Project Benefit**

This project coincides with the Towns Comprehensive Plan of improving the quality of life, maintaining recreational facilities, investing in routine asset management, meeting the needs of children, youth and seniors, maintaining open space and reflects community priorities.



**TOWN OF BELMONT**  
**COMMUNITY PRESERVATION COMMITTEE**  
**CPA Fund (Including Proposed FY17 Projects)**  
**March 21, 2016**

Collection (FY12-FY16)

Local Surcharge	\$ 4,662,532
State Match	\$ 1,283,254
Interest and Other Fees	\$ 34,097
<b>Total Collection</b>	<b>\$ 5,979,883</b>

Expenses (FY12-FY17)

Project Spending	\$ (3,005,216)
Remaining Appropriated Project Funding	\$ (1,558,406)
Proposed FY17 Projects	\$ (818,350)
<b>Total Project Expenses</b>	<b>\$ (5,381,973)</b>
Admin Spending*	\$ (90,282)
Proposed FY17 Admin Budget**	\$ (56,250)
<b>Total Admin Expenses</b>	<b>\$ (146,532)</b>
<b>Total Expenses</b>	<b>\$ (5,528,505)</b>

Summary

Collections	\$ 5,979,883
Expenses	\$ (5,528,505)
<b>Total CPA Fund Balance</b>	<b>\$ 451,378</b>


<b>*Admin Spending</b>	<b>FY13</b>	<b>FY14</b>	<b>FY15</b>	<b>FY16</b>
Admin Salary	\$ 8,345	\$ 8,917	\$ 11,412	\$ 12,000
Procurement Training	\$ -	\$ 450	\$ 1,265	\$ -
Open Space Land and Housing Inventory	\$ -	\$ 30,000	\$ -	\$ -
Deed Restriction - Homer House	\$ -	\$ -	\$ -	\$ 4,266
CPA Coalition Dues	\$ 3,000	\$ 3,000	\$ 3,500	\$ 3,500
Misc Office Supplies	\$ 111	\$ 154	\$ -	\$ 363
<b>Total Admin Spending</b>	<b>\$ 11,456</b>	<b>\$ 42,521</b>	<b>\$ 16,177</b>	<b>\$ 20,129</b>

\*\*5% of annual revenues in the Community Preservation Fund, as allowed under M.G.L. c44B Section 6.  
All appropriated admin funds that are not expended by the end of the fiscal year are returned to the CPA Fund.  
See below for a history of admin appropriations and turnbacks.

	<b>FY13</b>	<b>FY14</b>	<b>FY15</b>	<b>FY16</b>
Original Appropriated Admin Budgets	\$ 54,000	\$ 58,000	\$ 56,498	\$ 56,200
Turnback	\$ 42,544	\$ 15,479	\$ 40,321	\$ 36,071

**TOWN OF BELMONT**  
**COMMUNITY PRESERVATION COMMITTEE**  
**CPA Project Statuses**  
**March 11, 2016**

**FY 2014**

PROJECT	SPONSOR	APPROPRIATION	EXPENSES	% COMPLETED	TURNBACK
(Belmont Village) Electric Service Upgrade Underground Wiring —	Donna Hamilton	\$ 147,000.00	\$ 128,161.22	100.00%	\$ 18,838.78
(Town Hall) Concord Avenue Door Remediation —	Kevin Looney	\$ 72,000.00	\$ 71,870.50	100.00%	\$ 129.50
Building Survey and Investigation of the William Flagg Homer House —	Susan Smart	\$ 10,000.00	\$ 9,500.00	100.00%	\$ 500.00
<b>Comprehensive Cultural Resources Survey</b> CPC approved a deadline extension to 6-30-16	Lisa Harrington	\$ 115,000.00	\$ 45,000.00	39.13%	\$ -
<b>Irrigation Improvements at Rock Meadow Community Gardens</b> CPC approved a deadline extension to 6-30-16	Mary Trudeau	\$ 10,000.00	\$ 8,000.00	80.00%	\$ -
Joey's Park Rehabilitation —	Ellen Schreiber	\$ 100,000.00	\$ 100,000.00	100.00%	\$ -
Landscape Plan for Intergenerational Walking Path at Clay Pit Pond —	Mary Trudeau	\$ 20,000.00	\$ 18,970.00	100.00%	\$ 1,030.00
<b>Preserving and Digitizing Belmont's Vital Records</b> CPC approved a deadline extension to 6-30-16	Ellen O'Brien Cushman	\$ 100,000.00	\$ 77,310.09	77.31%	\$ -
Underwood Park (Plan & Design) —	Peter J Castanino	\$ 298,000.00	\$ 298,000.00	100.00%	\$ -
		\$ 872,000.00	\$ 756,811.81 	88.49%	\$ 20,498.28

<b>Project:</b>	<b>Belmont Village Electric Service Upgrade – Underground Wiring (Affordable Housing)</b>
<b>Location:</b>	<b>59 Pearson Rd</b>
<b>CPA Project Category:</b>	<b>Community Housing</b>
<b>CPA Funding Category:</b>	<b>Community Housing</b>
<b>Amount Requested:</b>	<b>\$147,000</b>
<b>Amount Awarded:</b>	<b>\$147,000</b>
<b>CPC Vote</b>	<b>9-0</b>
<b>Sponsor:</b>	<b>Donna Hamilton, Executive Director of the Belmont Housing Authority</b>

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#### **Project Description**

This project proposes replacing all of the existing direct buried underground electric services to twenty-one buildings, with new conductors installed in new underground conduits at Belmont Village. The underground cables have not been replaced since the development was originally built in 1949.

#### **Project Goals and Objectives**

The primary goal of the project is to provide a long term resolution to potential power outages that would require relocation of family housing residents and to address safety concerns with regard to fire hazards that are associated with aging underground wiring.

#### **Project Benefit**

The project addresses some of the housing needs as defined in the 2010-2020 Belmont Comprehensive Plan, which specifically states that “many low and moderate income Belmont residents face serious housing cost burdens and other problems.” The proposed electric service upgrades will lengthen the useful life of the existing low-income housing and will enable the Belmont Housing Authority to continue to maintain and preserve the development for many more years.

<b>Project:</b>	<b>Town Hall Concord Ave Door Remediation</b>
<b>Location:</b>	<b>455 Concord Ave</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$72,000</b>
<b>Amount Awarded:</b>	<b>\$72,000</b>
<b>CPC Vote</b>	<b>9-0</b>
<b>Sponsors:</b>	<b>Kevin Looney, Manager of Building Services</b> <b>David Kale, Town Administrator</b>

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#### **Project Description**

This project proposes the renovation of the three Town Hall exit doors facing Concord Ave. These doors were overlooked during the first two Town Hall renovations. This project would use the requested funds to complete the overall appearance of the Town Hall.

#### **Project Goals and Objectives**

Each door will require full factory refinishing, new hardware, and new weather stripping. Each set of doors is expected to undergo a fifteen week restoration process, with the entire project occurring in a span of approximately twelve months.

#### **Project Benefit**

The renovation of the three Town Hall exit doors will complete the overall renovations that began in 1999. It will match the overall aesthetics of the historic building, as well as improve security and energy conservation.

<b>Project:</b>	<b>Building Survey &amp; Investigation of the 1853 William Flagg Homer House</b>
<b>Location:</b>	<b>661 Pleasant St</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$10,000</b>
<b>Amount Awarded:</b>	<b>\$10,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Susan Smart, Belmont Women's Club Maryann Scali, Belmont Women's Club</b>

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#### **Project Description**

This project proposes a professional building survey and investigation of the interior and exterior envelope of the 1853 William Flagg Homer House.

#### **Project Goals and Objectives**

The goal is to produce a guiding document containing a conditions assessment, treatment recommendations and work cost estimates for the property. The long-term objective is to use this document as a point of reference in the practical planning of future preservation efforts.

#### **Project Benefit**

This project addresses the Town's needs as stated in the 2010-2020 Belmont Comprehensive Plan with regard to identifying "vulnerable historic assets and the measures to protect them." The project also has the potential of stimulating cultural tourism to the site, thereby contributing to the goals of "creating economic value" and promoting a "higher quality of life" town wide, as stated in the Comprehensive Plan.

<b>Project:</b>	<b>Comprehensive Cultural Resources Survey of Belmont</b>
<b>Location:</b>	<b>Town-Wide</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$115,000</b>
<b>Amount Awarded:</b>	<b>\$115,000</b>
<b>CPC Vote</b>	<b>7-1 (1 member absent from vote)</b>
<b>Sponsor:</b>	<b>Lisa Harrington, member of the Historic District Commission</b>

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#### **Project Description**

This project proposes the creation of a town-wide survey and inventory of historic properties, neighborhoods and other historic resources in Belmont.

#### **Project Goals and Objectives**

The primary goal is to create a Survey of Belmont's Historic Resources in an effort to supplant the existing 1982 Survey of Historic Resources, which contains numerous errors and omissions. The new Survey will fulfill key strategies in the 2010-2020 Belmont Comprehensive Plan by creating an inventory of landmark buildings, open spaces, and historic patterns throughout the Town.

#### **Project Benefit**

The Survey will be an important tool used to follow through on the following Comprehensive Plan recommendations: reinforce Belmont's neighborhoods and centers through historic and natural resource protection; refocus control of future development on design guidelines and review process to supplement traditional zoning, clarify the land use vision for each commercial area, and allow economically viable development which complements the Town's existing character.



<b>Project:</b>	<b>Irrigation Improvements at Rock Meadow Community Gardens</b>
<b>Location:</b>	<b>Mill St (Between Trapelo Rd and Winter St)</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$10,000</b>
<b>Amount Awarded:</b>	<b>\$10,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Mary Trudeau, Conservation Agent</b> <b>Glenn Clancy, Director of Community Development</b>

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#### **Project Description**

The project proposes improving and expanding the existing water supply system servicing 137 garden rental plots within the Community Gardens at Rock Meadow. The improved irrigation system will address leakage issues, variations in water pressure, and the need for additional spigots.

#### **Project Goals and Objectives**

The goal is to increase the available water supply within the Gardens. The proposed funding will be used to replace the existing one inch main to the west with a two inch diameter line, replace damaged irrigation lines, replace existing spigots; add two new spigots; and bed all existing and proposed trenches in sand.

#### **Project Benefit**

Irrigation improvements will benefit the 137 gardeners who use the plots each summer, as well as the more than 100 applicants that are on a waiting list to rent available garden plots in the future.

<b>Project:</b>	<b>Joey's Park Rehabilitation</b>
<b>Location:</b>	<b>97 Waterhouse Rd</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>up to \$100,000</b>
<b>Amount Awarded:</b>	<b>up to \$100,000</b>
<b>CPC Vote</b>	<b>9-0</b>
<b>Sponsors:</b>	<b>Ellen Schreiber, Friends of Joey's Park</b>
	<b>Diane Miller, Friends of Joey's Park</b>

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#### **Project Description**

This project proposes using public and private funding sources to rebuild Joey's Park. The construction would be done through a community build, with members of Play By Design acting as construction supervisors and volunteers acting as crew captains and laborers. The design of the park was completed in the fall of 2012, with the help of 450 Belmont children who contributed ideas for the new park during a community-wide Design Day on September 20, 2012.

#### **Project Goals and Objectives**

As most of the funding for the new park will come from private sources, the requested funds would be used to purchase materials such as the structural plastic, composites & lumber, hardware & tools, and engineered wood fiber ground cover. These materials would be purchased during the summer of 2013, with construction scheduled to be completed by October 14, 2013.

#### **Project Benefit**

Rebuilding Joey's Park will provide a long-term recreational benefit to Belmont families and help to preserve the essential character of the Town. It will replace a town resource that is threatened due to age and safety violations.



<b>Project:</b>	<b>Intergenerational Walking Path Plan at Clay Pit Pond</b>
<b>Location:</b>	<b>Concord Ave (Opposite Louise Rd)</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$20,000</b>
<b>Amount Awarded:</b>	<b>\$20,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Mary Trudeau, Conservation Agent</b>
	<b>Glenn Clancy, Director of Community Development</b>

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#### **Project Description**

This project proposes engaging the services of a Registered Landscape Architect to design a fully accessible walking/fitness trail to rehabilitate, restore and preserve the existing paths and landscape at Clay Pit Pond. The requested \$20,000 will not be used to fund any construction work.

#### **Project Goals and Objectives**

The goal is to produce a master phased landscaping plan for the perpetual use of the park lands. The resulting phased landscaping plan will provide the framework to structure projects for community service days; utilize offers of volunteer labor, such as Eagle Scout and Girl Scout projects and provide a basis for future grant proposals.

#### **Project Benefit**

The project will make it possible for a handicapped accessible intergenerational path to be created at this site, enhancing social connections and making physical fitness and passive recreational opportunities possible for a wide range of users. The plan will also assist the Department of Public Works and various community service groups to continue their meaningful contributions to the maintenance of the park.

<b>Project:</b>	<b>Preserving and Digitizing Belmont's Vital Records</b>
<b>Location:</b>	<b>455 Concord Ave</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>up to \$100,000</b>
<b>Amount Awarded:</b>	<b>up to \$100,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsor:</b>	<b>Ellen O'Brien Cushman, Town Clerk</b>

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#### **Project Description**

This project proposes hiring a suitable vendor to conduct and prepare a Conservation Survey in order to determine the best approach to conserving original vital records of births, deaths and marriages in Belmont. The funds that remain after this survey is completed will be used to scan and preserve the most critical volumes.

#### **Project Goals and Objectives**

As this will be a phased project spanning multiple years, the goal is to address the overall conservation plan for Belmont's vital records and address the at risk documents in the first year. The Survey will also determine the complete cost of the project and what further funding is required to complete the conservation plan.

#### **Project Benefit**

Town residents will benefit by having the historic record of generations of Belmont citizens preserved for familial research purposes. Residents are also required at times to present these documents to Insurance, Social Security, State Department, Homeland Security, FEMA, Mortgages, and State agencies. Therefore, it is critical that a long term preservation solution is determined to ensure these documents remain intact and readily accessible to the public.

<b>Project:</b>	<b>Underwood Park (Plan and Design)</b>
<b>Location:</b>	<b>1 Cottage St.</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Undesignated</b>
<b>Amount Requested:</b>	<b>up to \$298,000</b>
<b>Amount Awarded:</b>	<b>up to \$298,000</b>
<b>CPC Vote</b>	<b>9-0</b>
<b>Sponsors:</b>	<b>Peter Castanino, Director of the Department of Public Works</b> <b>David Kale, Town Administrator</b>

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**Project Description**

This project proposes funding the design for rebuilding or relocating the Underwood Pool and possibly a multi-purpose athletic field, pending the results of the Feasibility and Preliminary Design Study that has already been funded by the Town. The requested \$385,000 is for design only, and will not be used to fund any construction work.

**Project Goals and Objectives**

The goal is to create a design document based on the preferred alternative from the aforementioned Feasibility and Preliminary Design Study.

**Project Benefit**

The project will help to preserve and utilize current Town owned assets that would otherwise be threatened, and provides a long-term contribution to the Town. It would also allow the distinctive sense of community that the pool has nurtured since 1912 to continue in Belmont.

**TOWN OF BELMONT**  
**COMMUNITY PRESERVATION COMMITTEE**  
**CPA Project Statuses**  
**March 11, 2016**

**FY 2015**

PROJECT	SPONSOR	APPROPRIATION	EXPENSES	% COMPLETED	TURNBACK
<b>Belmont Community Moving Image Archive</b> The archival process has started. No invoices submitted at this time.	<b>Jeffrey Hansell</b>	\$ 12,000.00	\$ -	0.00%	\$ -
<b>Daniel Butler School Playground Project (Phase II)</b> The majority of the project has been completed, with some invoice processing and minor finishing work remaining.	<b>Michael McAllister, Principal</b>	\$ 66,524.00	\$ 59,008.00	88.70%	\$ -
<b>(Belmont Village) Electrical Upgrade Interior Wiring</b> After receiving the Town's electrical inspector's approval, work to upgrade the electrical work has begun at the rate of one unit per day.	<b>Donna Hamilton</b>	\$ 165,000.00	\$ 34,994.00	21.21%	\$ -
<b>First Time Homebuyer Assistance</b> Although grant recipients have been selected, finding applicable housing stock has become increasingly difficult. Project sponsors and the CPC will reassess project by the close of FY16.	<b>Helen Bakeman</b>	\$ 375,000.00	\$ -	0.00%	\$ -
<b>JV Field Irrigation Upgrade</b> —	<b>Jim Fitzgerald</b>	\$ 8,700.00	\$ 8,700.00	100.00%	\$ -
<b>Underwood Pool</b> A few invoices for contract administration remain before the CPC can vote to officially close the project.	<b>David Kale</b>	\$ 2,000,000.00	\$ 1,997,399.86	99.87%	\$ -
<b>Winn Brook Field Renovation</b> —	<b>Peter Thomson</b>	\$ 100,000.00	\$ 96,373.54	100.00%	\$ 3,626.46
		<b>\$ 2,727,224.00</b>	<b>\$ 2,196,475.40</b>	<b>58.54%</b>	<b>\$ 3,626.46</b>

<b>Project:</b>	<b>Belmont Community Moving Image Archive</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$12,000</b>
<b>Amount Awarded:</b>	<b>\$12,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Jeffrey Hansell</b>

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#### **Project Description**

The Project proposes maintain a community archive that will preserve the unique history, culture, visions, and voices of Belmont through film and video.

#### **Project Goals and Objectives**

The goals of the project are:

- a. To preserve the video library of public meetings, community events, and other locally produced programming housed at Belmont Media Center; and by their preservation are made publicly accessible for research and viewing via an online "digital moving image archive".
- b. To preserve historically or culturally significant video media and films donated or made available to BMC by residents and organizations and made publicly accessible via the online archives.
- c. To further develop the structure, policies and operations, and funding to best maintain the archives as community resource.

#### **Project Benefit**

The project will preserve historic resources for the Town and will enable anyone to access the video history of Belmont. The archives will benefit historians, elected officials, civic activists, and students looking to research the history of the town in which they live.



<b>Project:</b>	<b>Daniel Butler School Playground Project (Phase II)</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$66,524</b>
<b>Amount Awarded:</b>	<b>\$66,524</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>Kevin Sullivan, Daniel Butler School Playground Committee</b>

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#### **Project Description**

The project proposes complete the second phase of construction for the new Daniel Butler School Playground, which was shut down in the Fall of 2011.

#### **Project Goals and Objectives**

The goals for the project are as follows:

1. Increased lighting and signage
2. Increasing the number of trash receptacles
3. Stump edging around the perimeter
4. Re-painting of the basketball courts and hard top
5. An outdoor classroom
6. Work on the back field (including landscaping, hydro seeding, and improvements to the Nurse's Garden, and repairs to the backstop)

#### **Project Benefit**

The project will address the Town's needs as stated in the 2010-2020 Belmont Comprehensive Plan; specifically "to preserve and enhance existing active and passive recreation areas and ensure adequate maintenance" of existing facilities. It also addresses the need for better maintenance in both "passive and active, public and private recreation areas" (p. 36).

<b>Project:</b>	<b>Electrical Upgrade</b>
<b>CPA Project Category:</b>	<b>Community Housing</b>
<b>CPA Funding Category:</b>	<b>Community Housing</b>
<b>Amount Requested:</b>	<b>\$165,000</b>
<b>Amount Awarded:</b>	<b>\$165,000</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>Donna Hamilton, Belmont Housing Authority</b>

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#### **Project Description**

This project proposes adding additional circuits and upgrading the electrical panels at Belmont Village in order to decrease circuit overloads within the apartments. The interior electrical wiring has not been upgraded since it was installed in 1949.

#### **Project Goals and Objectives**

The goal is to reduce the risk of potential fire hazards that may be caused by older wiring and insufficient receptacles. The existing wiring is not rated for 90°C as required by modern light fixtures and does not include a separate ground wire. The insulation on wiring from the 1940's and 1950's becomes very brittle over time, leading to arc faults and fires.

#### **Project Benefit**

The project addresses some of the housing needs as defined in the 2010-2020 Belmont Comprehensive Plan, which specifically states that "many low and moderate income Belmont residents face serious housing cost burdens or other problems ." The proposed electric service upgrades will lengthen the useful life of the existing low-income housing and will enable the Belmont Housing Authority to continue to maintain and preserve the development for many more years.

<b>Project:</b>	<b>First Time Homebuyer Assistance</b>
<b>CPA Project Category:</b>	<b>Community Housing</b>
<b>CPA Funding Category:</b>	<b>Community Housing</b>
<b>Amount Requested:</b>	<b>\$375,000</b>
<b>Amount Awarded:</b>	<b>\$375,000</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>Alisa Gardner-Todreas</b>

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#### **Project Description**

The project proposes establishing a First-Time Homebuyer Assistance Program, in order to make a small number of homes affordable to families or individuals just entering the housing market. This amount of funding is needed to start a program and justify the frontend effort and costs. The program is being modeled on ones implemented in other communities, adjusted for Belmont's particular market.

#### **Project Goals and Objectives**

The program will provide assistance to reduce the purchase prices, down-payments, and closing costs for three first-time homebuyers who are seeking to purchase a home (condo, townhouse, or single-family) in Belmont and whose annual income is at or below 80% of the area median income (AMI) as measured by the U.S Department of Housing and Urban Development (HUD). Buyers will be required to live in the property as their primary residence and must agree to a Deed Restriction on the property. All of them will be required to go through First -Time Homebuyer Counseling, obtain a conventional mortgage, and make a down payment. The program's overarching goal is to make existing homes count toward the mandated 10% affordable housing in every community in the Commonwealth. Belmont is currently at just 3.8%.

#### **Project Benefit**

Assisting first-time homebuyers preserves the essential character of the Town (our Town of Homes) as described in the Town's Comprehensive Plan : "Young adults and young families looking to buy a first home, or to rent an affordable one, do not have many options in Belmont." There will be a resident preference for those who live, work, or have children already in the Belmont schools. Assisting first-time homebuyers will benefit a currently under-served population, as it is difficult to afford a home in Belmont for those not already in the market and especially for new buyers with moderate incomes. And the program will provide a long-term contribution to the Town, through increasing Belmont's supply of affordable units and strengthening the core of moderate-income workers in town.



<b>Project:</b>	<b>JV Field Irrigation</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$8,700</b>
<b>Amount Recommended:</b>	<b>\$8,700</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>Jim Fitzgerald, Belmont Soccer Association</b>

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**Project Description**

This project proposes upgrading the irrigation system for the Town owned JV field located on Concord Ave opposite Cottage St.

**Project Goals and Objectives**

The goal is to upgrade the irrigation system so that sod can be used in place of grass for the JV Field. As the number of children who use the field has quadrupled since it was originally designed, it is no longer possible to plant grass and attain a solid root system prior to the beginning of the new season. By upgrading the irrigation system, Belmont Soccer Associate can use sod to improve the quality of the JV field.

**Project Benefit**

The project will benefit the thousands of children who use the field through Belmont High School Track, Lacrosse, and Soccer programs by providing a better, safer playing field for the players.

<b>Project:</b>	<b>Underwood Pool</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$2,000,000</b>
<b>Amount Recommended:</b>	<b>\$2,000,000</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>David Kale, Town Administrator</b> <b>Peter Castanino, Director of the Department of Public Works</b>

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**Project Description**

This project proposes funding the construction of the final design for the new Underwood Park complex.

**Project Goals and Objectives**

The goal of the project is to replace the Underwood Pool, a Town asset that has been available for all Belmont residents to use for the past 100 years.\*

**Project Benefit**

The project will help preserve and utilize current Town owned assets that would otherwise be threatened, and provides a long-term contribution to the Town. It would also allow the distinctive sense of community that the pool has nurtured since 1912 to continue in Belmont.

<b>Project:</b>	<b>Winn Brook Field Renovation</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$100,000</b>
<b>Amount Recommended:</b>	<b>\$100,000</b>
<b>CPC Vote</b>	<b>5-0 (4 members absent from vote)</b>
<b>Sponsors:</b>	<b>Peter Thomson, Belmont Second Soccer</b>

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#### **Project Description**

This project proposes renovating the Town owned recreation fields at Winn Brook elementary school for the long term use by the residents of Belmont. The project will be implemented in two phases to ensure that there are some fields available for the community during the renovation project.

#### **Project Goals and Objectives**

The goal is to update the fields by implementing a drainage system to prevent damage due to rain storms and ensure fields are playable after heavy or prolonged rain, implementing an irrigation system to keep the fields appropriately watered during prolonged dry weather, and create additional playing space for use by the community by reconfiguring some under-utilized space at the existing field.

#### **Project Benefit**

As a small town with limited recreational space and limited room to add net new space, this project aligns with the Town need to keep existing space well maintained for long term use and will also create a new soccer field within the existing recreation area. The additional playing field addresses the increased user base and the improved quality of the fields will also help to ensure child safety.

#### **Funding Request**

The funding request for this project is \$100,000. Although the total estimated cost of the project is \$302,000, the remaining \$202,000 will be acquired through a combination of grants, loans, and donations.

**TOWN OF BELMONT**  
**COMMUNITY PRESERVATION COMMITTEE**  
**CPA Project Statuses**  
**March 11, 2016**

FY 2016						
PROJECT	SPONSOR	APPROPRIATION	EXPENSES	% COMPLETED	TURNBACK	
<b>Belmont Veterans Memorial Project</b> —	Kevin Ryan	\$ 60,000.00	\$ 26,800.00	100.00%	\$ 33,200.00	
<b>Electrical Upgrade</b> See FY15 Phase 1	Donna Hamilton	\$ 522,500.00	\$ -	0.00%	\$ -	
<b>Digitization of Belmont Newspapers (1890-1923)</b> After a slight delay due to the change to a new project sponsor, preliminary work has resumed.	Emily Reardon	\$ 17,923.24	\$ -	0.00%	\$ -	
<b>1853 Homer House Rehabilitation and Restoration</b> Project sponsors have completed the first draft of the RFP, which is being sent to the Town for review.	Kelly Higgins	\$ 100,000.00	\$ -	0.00%	\$ -	
<b>Pequossette Tennis Courts Rehabilitation and Restoration</b> A vendor has been selected and the project is expected to be completed by late May 2016.	David Kale	\$ 295,000.00	\$ 25,128.98	8.52%	\$ -	
<b>Wellington Station Exterior Restoration and Rehabilitation</b> A vendor has been selected and work is expected to begin in May 2016.	Emilio E Mauro, Jr.	\$ 26,300.00	\$ -	0.00%	\$ -	
		\$ 1,021,723.24	\$ 51,928.98	18.09%	\$ 33,200.00	

#### **Article 8(a)**

<b>Project:</b>	<b>Belmont Veterans Memorial Project</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$60,000</b>
<b>Amount Recommended:</b>	<b>\$60,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Kevin Ryan, Belmont Veterans Memorial Committee</b>

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#### **Project Description**

As part of a broader initiative to restore and preserve memorials to Belmont's servicemen and women, the Belmont Veterans Memorial Project seeks to restore and preserve the existing monument to Belmont citizens who died fighting in the "Great War." The monument is located at the intersection of Concord Avenue and Common Street.

#### **Project Goals and Objectives**

The goal is to restore the monument to Belmont citizens who fought and died in the "Great War." The project will remove paint from the monument and clean all surfaces as well as the surrounding mason railing and pavers. It will preserve the monument by repointing joints and waterproofing against weathering and environmental wear.

#### **Project Benefit**

In this 100th anniversary year of the beginning of WWI, the "Great War," the lessons of this first great conflict of the modern era are still important to our lives. This monument honorably commemorates the Belmont citizens who fought and died in the "Great War." The memorial and the tri-corner of land on which it sits provide a place for reflection and for education. Each year the town holds a ceremony at the site to honor Belmont's veterans. It prompts us to think about the costs of war and the sacrifices it demands. But the monument needs restoration. A close observation shows that it is made of a fine granite under a grey coat of protective paint. The monument's paint is peeling and it is stained by carbon from years of automobile traffic. Restoring the memorial is a project that not only preserves the monument for future generations but also preserves what the Belmont Historical Society calls an "historic park honoring military service."

#### **Funding Request**

The total amount of money requested to restore and preserve the monument to the fallen in the "Great War" is \$60,000. This money would cover permits, removal of paint, restoration cleaning, paver "resetting" and cleaning, stone joint repointing, wash down, and waterproofing.



#### **Article 8(b)**

<b>Project:</b>	<b>Electrical Upgrade</b>
<b>CPA Project Category:</b>	<b>Community Housing</b>
<b>CPA Funding Category:</b>	<b>Community Housing</b>
<b>Amount Requested:</b>	<b>\$522,500</b>
<b>Amount Recommended:</b>	<b>\$522,500</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Donna Hamilton, Belmont Housing Authority</b>

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#### **Project Description**

Because Belmont Village was originally built in 1949, the scope of work for the proposed project would be to install additional circuits and upgrade electrical panels in order to either prevent or substantially decrease circuit overloads within the residential apartments that are located in the family housing development. The existing wiring at Belmont Village is original to the buildings and was installed in 1949. The wiring methods used were typical for the time period and did not include a ground wire. The outlets installed were simply two prong (i.e. a hot and neutral). The existing wiring method did not include a separate ground wire.

#### **Project Goals and Objectives**

The primary goal is to reduce any potential fire hazards that may be caused by older wiring and insufficient receptacles that are not able to accommodate the number of appliances and electronics that are currently being used. This is the second request for CPA funds for electrical upgrades to Belmont Village. The first request was approved by Town Meeting in 2014 for \$165,000 and paid for upgrading 6 of the 25 buildings. This FY16 project will replace the electric panel, all wiring, the receptacles and the light switches in each apartment in the remaining 19 buildings. Each receptacles will have three wire circuits (Hot, Neutral, Ground), and Ground Fault Circuit Interrupter protected outlets will be installed in the kitchen, bathroom, and basement areas. As required by code, the project would also install Arc-Fault protected circuits.

#### **Project Benefit**

As stated in the Consolidated Plan for the Town of Belmont, "many low and moderate income Belmont residents face serious housing cost burdens or other problems". Since Belmont Village was constructed in 1949, the Belmont Housing Authority has provided decent, safe and affordable housing for income eligible families and will continue to work with the Town in order to address the housing concerns and needs of its residents. Belmont residents and Veterans are given a preference over non-residents and local residents are strongly encouraged to apply.

#### **Funding Request**

The funding request for this project is \$522,500.00, based on the estimate provided by the Belmont Housing Authority.

#### Article 8(c)

<b>Project:</b>	<b>Digitization of Belmont Newspapers (1890-1923)</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$17,923.24</b>
<b>Amount Recommended:</b>	<b>\$17,923.24</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Emily Reardon, Acting Library Director</b> <b>Kathleen Keohane, Board of Library Trustees</b>

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#### **Project Description**

The library's proposed project request is to digitize the local Belmont historical newspapers from 1890-1923 that are no longer published and in the public domain. Currently the local newspapers are only available in the library on microfilm. The library owns the master reels of microfilm.

#### **Project Goals and Objectives**

The goals of the proposed project are:

- to preserve Belmont's local history and make it accessible to the public 24/7
- to help preserve the longevity of the local newspapers
- to make information readily available in a means that the public now expects
- to make Belmont's historic newspapers available to future generations
- to help improve staff efficiency by reducing the amount of time library staff devote to researching local history questions by offering "keyword" searching which is not available on the microfilm

#### **Project Benefit**

The local newspapers are used for research by students, genealogists, business owners and prospective employees, real estate agents, attorneys, government agencies, community groups, members of historical societies, and history buffs. The library is the only repository collecting and preserving the local newspapers and will always have the master microfilm reels. Once the local newspapers are digitized, users will be able to access these resources from their home 24/7. Searching that used to take hours will take only minutes because of the ability to do a "key word" search. These newspapers are the only source that can provide an historic picture of the way life was in Belmont. This project is important to Belmont's history and a great benefit to the citizens of Belmont.

#### **Funding Request**

The funding request for this project is \$17,923.24, based on the estimate provided by Lyrasis Digital and Blue Robin.



**Article 8(d)**

<b>Project:</b>	<b>1853 Homer House Rehabilitation and Restoration</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$100,000</b>
<b>Amount Recommended:</b>	<b>\$100,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Kelly Higgins, Belmont Woman's Club</b> <b>Susan Smart, Belmont Woman's Club</b>

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**Project Description**

This project will address high-priority preservation and rehabilitation needs of the 1853 William Flagg Homer House as described in the professional Building Survey and Investigation (funded by Town Meeting, through CPA, in 2013), and as necessary to follow the Winter 2014 emergency work (funded by the Belmont Woman's Club and the Belmont Savings Bank) that involved the temporary stabilization/netting of the House's cupola for public safety. The cupola interior itself remains vulnerable to the elements; the netting merely prevents projectiles from the roof.

**Project Goals and Objectives**

The first phase of work will produce construction documents informed by historical analysis. Primary focus of the implementation phase will be on the cupola restoration and the replacing of failed or missing elements. One aspect of this project, restoring operability to the cupola windows, will allow proper ventilation of the house, provide access to the roof, and enhance the visitor experience.

**Project Benefit**

The Town of Belmont Comprehensive Plan, 2010-2020, clearly states the town's historic preservation goals, among them being to "broaden the preservation and protection of Belmont's historic buildings and sites" and preserve "scenic vistas." Among the historic preservation strategies suggested to achieve this and other goals is the identification of "vulnerable historic assets and the measures to protect them." The measures identified in the 2013 CPA-funded Building Survey and Investigation as the Emergency and Short term rehabilitation and restoration of the cupola and the porches directly addresses the Town's stated needs and strategies in this area. The Homer House, listed on the State Register and on the National Register of Historic Places as part of the Pleasant Street Historic District, has been a Belmont architectural landmark for generations.

**Funding Request**

The funding request for this project is \$100,000, based on preliminary estimate provided by Gary Wolf, AIA, Wolf Architects, Inc., Boston, MA, author of the 2013 Homer House Building Survey and Investigation.



#### **Article 8(e)**

<b>Project:</b>	<b>Pequossette Tennis Courts Rehabilitation and Restoration</b>
<b>CPA Project Category:</b>	<b>Recreation</b>
<b>CPA Funding Category:</b>	<b>Open Space/Recreation</b>
<b>Amount Requested:</b>	<b>\$295,000</b>
<b>Amount Recommended:</b>	<b>\$295,000</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>David Kale, Town Administrator</b>

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#### **Project Description**

The Board of Selectmen, working with the Department of Public Works, developed a plan to crack seal and resurface the deteriorated Town-owned sets of four tennis courts at three separate locations (Winn Brook Playground, Pequossette Playground, and the Grove Street Playground). The condition of these courts made the unsafe and unplayable and this plan was a two to five year temporary solution to improve the courts at all three locations. The Pequossette Tennis Courts, utilizing a Capital Budget appropriation, were crack-sealed and resurfaced in 2011 at a cost of \$21,160. These courts are at least 30 years old and the failure of the asphalt base does not allow for a permanent solution other than the complete removal and replacement (including fencing).

#### **Project Goals and Objectives**

The goal of the proposed project is to completely remove and replace the four tennis courts at the Pequossette Playground. The cost estimate includes the construction, professional design, specification preparation, and construction administration (including periodic inspection) by a Landscape Architect to ensure the quality of the work. This would be completed in the summer/fall of 2015.

#### **Project Benefit**

This important Town asset is needed as an integral part of the resident's opportunity to have athletic facilities available to them for both pleasure and competitive enjoyment with the associated health benefits. The availability of tennis courts also allows every new generation to have the opportunity to acquire skills that they can enjoy for a lifetime. This request addresses Town needs as identified in the CPA Guidelines. In addition, addresses the following needs as detailed in The Comprehensive Plan; quality of life, maintaining recreational facilities, invest in regular asset management, meeting the needs of children, youth and seniors, maintains open space and reflects community priorities.

#### **Funding Request**

The funding request for this project is \$295,000 and is based upon estimates submitted by the project sponsors.

**Article 8(f)**

<b>Project:</b>	<b>Wellington Station Exterior Restoration and Rehabilitation</b>
<b>CPA Project Category:</b>	<b>Historic Preservation</b>
<b>CPA Funding Category:</b>	<b>Historic Preservation</b>
<b>Amount Requested:</b>	<b>\$26,300</b>
<b>Amount Recommended:</b>	<b>\$26,300</b>
<b>CPC Vote</b>	<b>8-0 (1 member absent from vote)</b>
<b>Sponsors:</b>	<b>Emilio E Mauro, Jr., Belmont Historical Society</b>

---

**Project Description**

Located on town-owned parkland at 2 Common Street (adjacent to the First Church in Belmont), the Wellington Station is a highly visible local landmark close to Belmont Center. The existing wood shingle roof (now almost 30 years old) is nearing the end of its useful life and is in need of total replacement. This project proposes restoring and rehabilitating the building by replacing the existing roof, which is an important original design feature that must be replicated in-kind to preserve the building's historic appearance. A new roof is also imperative for the long-term survival of this building by ensuring it is weather-tight.

**Project Goals and Objectives**

The goal of this project is to ensure the long-term preservation of the historic Wellington Station by restoring its wood shingle roof, which is now at the end of its useful life after nearly 30 years. This project will include stripping the existing roof shingles, restoration of deteriorated roof sheathing boards, installing new wood shingles, replacing deteriorated sections of trim at the roof, and touching-up exterior paint at the roof trim elements.

**Project Benefit**

This project is needed to preserve this highly visible local historic landmark that is the centerpiece of the Common Street local historic district and is listed on the State Register of Historic Places. The Wellington Station is listed as one example of Belmont's historic assets in the Town of Belmont Comprehensive Plan 2010-2020, which sets a preservation goal to broaden the preservation and protection of Belmont's historic buildings, sites and neighborhoods.

**Funding Request**

The funding request for this project is \$26,300 and is based upon estimates submitted by Buttonwood Renovations.

## Article 13

### Roads to Be Reconstructed FY 2017\*

Name	From	To
DORSET RD	VILLAGE HILL RD	FRONTAGE RD
AUDUBON LN	CONCORD AVE	DEAD END
VILLAGE HILL RD	PARK AVE	WELLESLEY RD
EXETER ST	BELMONT ST	THINGVALLA
COMMON ST	BRETTWOOD RD	PAYSON ST
CROSS ST	BRIGHTON ST	ARLINGTON TOWN LINE
WINTER ST	CONCORD AVE	LEXINGTON TOWN LINE

\*Subject to change based on bid results and availability of National Grid

OFFICE OF COMMUNITY DEVELOPMENT  
TOWN OF BELMONT

19 Moore Street

Homer Municipal Building  
Belmont, Massachusetts 02478-0900

Telephone: (617) 993-2650 Fax: (617) 993-2651

Building Division  
(617) 993-2664  
Engineering Division  
(617) 993-2665  
Planning Division  
(617) 993-2666



TO: Town Meeting Members  
FROM: Planning Board \*  
Date: May 25, 2016

RE: Revised Article 6

**Background:** Alarmed by the increase in demolitions and the construction of oversized houses in a portion of the Single Residence C Zoning District, the April 2015 Town Meeting supported a Citizens' Petition for a moratorium on the construction of houses over 32 feet high. This moratorium will expire on June 30.

Since then, the Planning Board has worked to develop revised zoning for Single Residence C that would deal with redevelopment in an equitable fashion over the long term. It has done so in partnership with the Citizen Petitioners and the many Belmont residents who attended the nine public hearings and provided input on this Article.

Originally scheduled for the first session of 2016 Town Meeting, Article 6 was postponed in order to respond to Town Meeting Member requests for clearer, more readable language in Subpart 2, one of its five Subparts.

Our clear and readable Subpart 2 is attached. Please note that there are no changes in substance. A short summary of each Subpart is provided below. For your convenience, Article 6, as originally printed in the Warrant, with Subparts 1, 3, 4 and 5 which are unchanged in either substance or language, and the Zoning map are attached.

**Summary:** The zoning changes that you will be asked to approve to ensure that development enhances the Single Residence C neighborhood are summarized below. The summaries of revised Subpart 2 are italicized.

- Subparts:
1. Allows the grade of the lot to be lowered to minimize the apparent mass of the building (§ 1.4);
  2. *Establishes a Special Permit process for major construction (very large additions and post demolition reconstructions) on nonconforming lots. This process will be administered by the Planning Board and explicitly requires consideration of the impact on the neighborhood. Smaller additions still require only a building permit and mid-sized additions a permit from the Board of Appeals (§ 1.5.4);*  
*Provides a detailed list of factors to be considered in granting a Special Permit for major construction for nonconforming lots (§ 1.5.4 B. (5));*
  3. Restricts building height to 30 feet to the midpoint and 34 feet to the highest point (§4.2.2);
  4. Limits the placement and requires screening of HVAC equipment and propane tanks (§ 4.2.2); and,
  5. Requires the front setback of the house be consistent with its neighbors (§4.2.2).

We also thank all those who helped to revise this Article and ask that you support it on June 6. Please contact us at [Liz Allison@att.net](mailto:Liz.Allison@att.net) or [Jwheeler@belmont-ma.gov](mailto:Jwheeler@belmont-ma.gov) with any questions. We will provide additional information next week regarding any amendments submitted by residents.

\*Liz Allison (Chair)  
Charles Clark

Joseph DeStefano  
Barbara Fiacco (Vice chair)

Karl Haglund  
Raffi Manjikian

## Guide to Article 6....a five (5) part Article

<u>Sub-part</u>	<u>Topic</u>	<u>What we're proposing</u>	<u>Why we're proposing it</u>	<u>Amendments from residents*</u>	<u>PB vote on amendment</u>
1	Grade (of the lot)	Allow grade to be lowered (currently can only lower or raise by 12 inches)	Lowering grade can help reduce sense of size and bulk	None	N/A
2	Special Permit required for certain classes of construction on nonconforming lots	Require a Special Permit from the PB in two cases: 1. Applicant wants to increase gross floor area by more than 30% 2. Applicant has demolished the house and wants to rebuild a larger house and/or on a different footprint	Control "mega houses" that reduce the quality of life/value of neighboring houses and impair the character of the neighborhood	<b>Amendment 4</b> Change wording and grammar ----- <b>Amendment 5</b> Change wording and grammar in section of by-law that controls GR districts ----- <b>Amendment 7</b> Eliminate "design" as consideration in Special Permit review ----- <b>Amendment 8</b> Allow addition of 2 <sup>nd</sup> story by-right	<b>Unfavorable.</b> Makes language inconsistent with rest of Zoning By-Law. PB is developing plan for orderly cleanup ----- <b>Unfavorable:</b> Changes in GR zoning are beyond scope and were never discussed at a public hearing ----- <b>Unfavorable:</b> Design is a key element in minimizing apparent bulk and crucial to character of the neighborhood ----- <b>Unfavorable:</b> Allows 1,300 sf house on a 3,500 sf lot to become a 3,100 sf house by-right
3	Height	30' to midpoint and 34' to highest point of roof	Stop out of scale construction	None	N/A
4	HVAC and propane tank placement	Set back 10' from front of house, not in setbacks, not visible from street or neighboring houses. Current installations grandfathered.	Appearance of neighborhood, noise concerns. (If close to your house, you'll buy a quieter unit)	<b>Amendment 2</b> Install 5' back from front of house; place "adjacent" to house; "minimize" visibility. ----- <b>Amendment 6</b> Install 5' back from front of house	<b>Unfavorable:</b> Weakens protection for neighbors; vague language makes enforcement difficult ----- <b>Unfavorable:</b> Weakens protections for neighbors; reviewed small lots to make sure works
5	Front setback	Average of abutting houses	Avoid "missing tooth" effect	None	N/A





**SUBSTITUTE MOTION BY THE PLANNING BOARD  
2016 ANNUAL TOWN MEETING**

**June 6, 2016**

**Draft as of May 25, 2016**

*(Subject to Change)*

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**ARTICLE 6: RELATING TO THE CONSTRUCTION OF OVERSIZED DWELLING  
UNITS IN THE SINGLE RESIDENCE C ZONING DISTRICTS**

MOVED: That under Article 6, the reading of the proposed Amendment to the Zoning By-Law pertaining to Sections 1.4, “Definitions and Abbreviations” and 4.2.2, “Linear Requirements for Residential Districts”, be dispensed with, the same being set forth in full under Article 6, subparts 1, 3, 4 and 5 of the Warrant for this Meeting and having been distributed to each Town Meeting Member. (Majority vote)

MOVED: That the Town vote to amend the Zoning By-Law pertaining to Sections 1.4, “Definitions and Abbreviations” and 4.2.2, “Linear Requirements for Residential Districts”, as set forth under Article 6, subparts 1, 3, 4 and 5 of the Warrant for this Town Meeting. (Two-thirds vote)

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MOVED: That the Town vote to amend Section 1.5.4 of the Belmont Zoning By-Law, “Nonconforming Single and Two-Family Residential Structures”:

- a. By inserting the headings ‘A. General Residence Zoning Districts’, ‘B. Single Residence C Zoning Districts’, and ‘C. All Other Districts’, and
- b. By inserting new provisions under the heading for ‘B. Single Residence C Zoning Districts’,

so that Section 1.5.4 reads as follows:

**1.5.4 Nonconforming Single and Two-Family Residential Structures**

**A. General Residence Zoning Districts**

*[No change to existing first paragraph]*

**B. Single Residence C Zoning Districts**

- (1) In the Single Residence C Zoning Districts, a nonconforming single- and two-family residential structure may be reconstructed, extended, altered, or structurally changed upon a determination by the Building Commissioner that such proposed reconstruction, extension, alteration, or structural change does not increase the nonconforming nature of said structure.

The Building Commissioner may issue a Building Permit under any of the following circumstances:

- 1) An alteration to a structure which complies with all current setbacks, open space, lot coverage and building height. This clause shall apply-regardless of whether the lot complies with the current area and/or frontage requirements;
- 2) An alteration to a structure which encroaches upon one or more required setbacks, where the alteration will comply with all current setbacks, open space, lot coverage and building height requirements. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements;
- 3) A half-story addition to a nonconforming structure, that will not increase the footprint of the existing structure, create a new dimensional nonconformity or extend an existing dimensional nonconformity, provided that the existing height restrictions shall not be exceeded. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements.

If the Building Commissioner determines that the proposed alteration or structural change does not meet any of the clauses listed above, a Special Permit shall be required from the Board of Appeals.

- (2) If the Building Commissioner determines that such proposed alteration or structural change increases the gross floor area of the nonconforming structure by more than thirty percent (30%) either as:
  - a) A standalone application, in and of itself, or
  - b) When combined with the gross floor area added to the structure during the five- year period preceding the date of the pending application

then the proposed alteration or structural changes shall require a Special Permit from the Planning Board.

- (3) A nonconforming single- or two-family structure may be reconstructed after voluntary demolition if the building as reconstructed will be located on the same footprint as the original nonconforming structure, and will be no greater in volume or gross floor area as the original nonconforming structure.

If the Building Commissioner determines that the proposed reconstruction would:

- a. cause the structure to exceed the volume or gross floor area of the original nonconforming structure or
- b. cause the structure to be located other than on the original footprint,

then a Special Permit shall be required from the Planning Board prior to such reconstruction.

- (4) The Planning Board may grant a Special Permit under this Section 1.5.4.B. (2) or (3) if it finds that the enlarged building:
  - a) Is generally in harmony with the neighborhood;
  - b) Will neither generate excessive traffic, parking, noise or density impacts on the abutters, nor create other detrimental effects on the neighborhood;
  - c) Is appropriate in scale and mass for the neighborhood, with particular consideration of abutting properties;
  - d) Will not increase the existing nonconforming lot coverage, if it exists; and,
  - e) Will not be substantially more detrimental than the existing nonconforming building to the neighborhood.
- (5) In making any Special Permit decision pursuant to this Section 1.5.4.B. (2) or (3), the Planning Board shall consider the following:
  - a) Scale and design of the structure;
  - b) The siting of the structure and driveway;
  - c) Walkway, driveway and parking circulation;
  - d) Exterior lighting;
  - e) Open space and screening; and,
  - f) Drainage.
- (6) For the purposes of this Section 1.5.4.B., a nonconforming single- and two-family structure shall be defined as a single- and two-family structure on a lot that does not comply with the existing minimum lot area and/or frontage requirements and/or the single- and two-family structure encroaches or otherwise does not comply with one or more setbacks, open space, lot coverage or building height requirements.

An application for a Special Permit under this Section 1.5.4.B. shall comply with the procedures and requirements set forth in Section 7.4 of the Zoning By-law.

**C. All Other Districts**

[No changes to balance of Section 1.5.4.]

REPORTING: Planning Board and Warrant Committee

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(7) Fines. Fines for violations of this subsection shall be on the following schedule: first offense: written warning; second offense: \$50; third and successive offenses: \$100 each, to a maximum of \$350 per winter season (October 1 to April 30). In situations where there is more than one obligated person, such fines may be assessed jointly or individually. No more than one fine may be assessed with respect to any single weather event requiring removal or treatment of snow, slush or ice.

(8) Enforcement.

(a) A person who is an enforcing person as defined in Subsection J shall take appropriate action with respect to observed or reported violations of this subsection.

(b) An enforcing person taking cognizance of such a violation shall promptly send the alleged offender a noncriminal written citation thereof by hand delivery or mail, postage prepaid, addressed to the owner of record.

(c) An owner of record who receives a citation pursuant to this subsection shall have 20 days thereafter to pay the applicable fine or to provide to the enforcing person a photocopy of the written agreement or lease used to delegate the obligation to comply with this subsection, in which case the owner of record shall not be responsible for paying any applicable fine, and the enforcing person may dismiss or modify the citation or reissue the citation to the obligated person as is deemed appropriate.

(d) If a citation is not dismissed and the fine is not timely paid, the provisions of Subsection J, other than those establishing penalties, shall be applicable.

(9) Not evidence. Except as required by applicable law, violations of this subsection shall not be admissible as evidence of negligence in any civil proceeding brought by an injured third party against an obligated person, tenant, or owner of record.

*This article seeks only to remove the "sunset" provision from the existing Bylaw and reinsert the Residential Property Snow Removal provision to the General Bylaws to require that owners of residential property with paved sidewalks remove snow and ice within 24 hours to provide safe pedestrian passage. Violations would be subject to a non-criminal fine. The Board of Selectmen will adopt rules and regulations to determine hardship exemptions.*

Submitted by the Board of Selectmen

The Bylaw Review Committee will report on this article.

**Majority vote required for passage.**

**ARTICLE 6:**

**RELATING TO THE CONSTRUCTION OF OVERSIZED DWELLING  
UNITS IN THE SINGLE RESIDENCE C ZONING DISTRICTS**

1. To see if the Town will vote to amend Section 1.4, Definitions and Abbreviations, in the definition for 'Grade' by replacing the word 'altered' with 'raised' in the last sentence, as follows:

**Grade** - The average of the ground level adjoining the building at all exterior walls based upon the existing contour lines. Contour lines shall be illustrated on a plan and shall be established

prior to any filling or earth moving/removal activities. The grade shall not be altered-raised more than 12 inches to allow for proper drainage.

2. To see if the Town will vote to amend Section 1.5.4, Nonconforming Single and Two-Family Residential Structures, by inserting:
  - a. The headings 'General Residence Zoning Districts', 'Single Residence C Zoning Districts', and 'All Other Districts', and
  - b. The provisions under the heading for 'Single Residence C Zoning Districts', as follows:

#### 1.5.4 Nonconforming Single and Two-Family Residential Structures

##### General Residence Zoning Districts

In the General Residence Zoning District, as provided in Massachusetts General Law Chapter 40A, Section 6, preexisting non-conforming structures may be extended or altered with a Special Permit by the Planning Board, provided that no such extension or alteration shall be permitted unless there is a finding by the Planning Board that such extension or alteration shall not be substantially more detrimental to the neighborhood than the existing nonconforming structure. Notwithstanding the foregoing, dormers that comply with Section 4.2.2, Linear Requirements, shall be allowed without review by the Planning Board. On lots that do not comply with the minimum lot area per dwelling, the minimum lot area per dwelling shall be the minimum lot area per dwelling. Structures may not be voluntarily demolished without a Special Permit issued by the Planning Board.

## PLEASE REFER TO ATTACHED SUBSTITUTE MOTION FOR REVISED SUBPART 2

##### Single Residence

In the Single Residence C Zoning Districts, a nonconforming single- and two-family residential structure may be reconstructed, extended, altered, or structurally changed upon a determination by the Building Commissioner that such proposed reconstruction, extension, alteration, or structural change does not increase the nonconforming nature of said structure.

The Building Commissioner may issue a Building Permit under the following circumstances:

- 1) An alteration to a structure which complies with all current setbacks, open space, lot coverage and building height requirements but is located on a lot with insufficient area and/or frontage;
- 2) An alteration to a structure which encroaches upon one or more required setbacks, where the alteration will comply with all current setbacks, open space, lot coverage and building height requirements. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements;
- 3) A half-story addition to a nonconforming structure, that will not increase the footprint of the existing structure, create a new dimensional nonconformity or extend an existing dimensional nonconformity, provided that the existing height restrictions shall not be exceeded. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements.

If the proposed reconstruction, renovation, extension, alteration, or structural change does not meet the standards listed above, a Special Permit shall be required from the Board of Appeals.

If the Building Commissioner determines that such proposed reconstruction, extension, alteration, or structural change,

- 1) Increases the gross floor area of the non-conforming structure by more than thirty percent (30%); or,
- 2) Has been altered, extended, reconstructed or structural change made to the exterior of the structure within the past five (5) years beginning on the date of issuance of the most recently issued building permit,

a Special Permit under Section 6D of this Zoning By-Law, where applicable, shall be required from the Planning Board.

A nonconforming single- or two-family structure may be reconstructed after voluntary demolition in accordance with the following provisions:

1. Building(s) as reconstructed shall be located on the same footprint as the original nonconforming structure, and shall be only as great in volume or area as the original nonconforming structure.

2. If the prop

**PLEASE REFER TO ATTACHED  
SUBSTITUTE MOTION  
FOR REVISED SUBPART 2**

- a. causi  
struct

onforming

- b. cause the structure to be located other than on the original footprint,

a Special Permit under Section 6D of this Zoning By-Law, where applicable, shall be required from the Planning Board prior to such demolition.

The Special Permit Granting Authority may grant a Special Permit to reconstruct, extend, alter or change a nonconforming structure if it finds that the reconstructed and enlarged building:

1. is appropriate in scale and mass for the neighborhood, with particular consideration of abutting properties,
2. will not increase the existing nonconforming lot coverage, if it exists, and
3. will not be substantially more detrimental than the existing nonconforming building to the neighborhood.

For the purposes of this Section, a nonconforming single- and two-family structure shall be defined as a single- and two-family structure on a lot that does not comply with the existing minimum lot area and/or frontage requirements and/or the single- and two-family structure encroaches or otherwise does not comply with one or more setbacks, open space, lot coverage or building height requirements.

~~In All Other Districts~~

~~In all other districts  
reconstructed, the  
Commissioner  
does not increase  
issue a Building~~

**PLEASE REFER TO ATTACHED  
SUBSTITUTE MOTION  
FOR REVISED SUBPART 2**

~~es may be  
on by the Building  
structural change  
Commissioner may~~

3. To see if the Town will vote to amend Section 4.2.2, Linear Requirements for Residential Districts, as follows:
  - a. Within the dimensional table create a new row for 'SR-C' by separating it from 'SR-B';
  - b. Under the 'Maximum Building Height, Feet' column, replace '36' with '30'; and,
  - c. Under subsection B. Height, insert an item '2' limiting the ridge to 34 feet and renumber the remaining items accordingly;

RESIDENTIAL DISTRICTS	MINIMUM SETBACK DIMENSIONS FEET			MAXIMUM BUILDING HEIGHT	
	Front	Side	Rear	Feet	Stories
SR-B and SR-C					
➤ Dwelling	25	10	30	36	2½
➤ Other	25	10	25	36	2½
SR-C					
➤ Dwelling	25	10	30	30	2½
➤ Other	25	10	25	30	2½

**B. Height**

2. In the SR-C Districts, the height of a Dwelling or other structure shall not exceed 34 feet to the ridge. Notwithstanding the definition of 'Height' in Section 1.4, the height of a Dwelling or other structure with a flat roof shall not exceed 30 feet to the highest point of the roof.
4. To see if the Town will amend Section 4.2.2, Linear Requirements for Residential Districts, subsection A. Setbacks, by inserting an item '2' and renumber the remaining items accordingly, as follows:

**A. Setbacks**

2. In the SR-C Districts, the placement of ground-mounted outdoor mechanical and fuel storage equipment on a lot shall be subject to the following requirements:
  - a. Not within the front yard - The front yard is defined as the area between a line obtained by extending the front elevation of the dwelling to each of the sidelines of the lot and the front line of the lot;
  - b. Not within the required side or rear setbacks;
  - c. Not within at least 10'-0" of the front elevation; and,
  - d. Screened so that it is not visible from the street or adjacent properties.

5. To see if the Town will vote to amend Section 4.2.2, Linear Requirements for Residential Districts, subsection A. Setbacks, by inserting an item '4' and renumber the remaining items accordingly, as follows:

A. Setbacks

4. Notwithstanding the front setback requirements listed in Section 4.2.2, the front setback for the SR-C Districts shall be the average of the front setbacks of the buildings on the lots contiguous thereto on either side. A vacant lot, a lot occupied by a building set back more than the required minimum, or an intersecting street shall be counted as though occupied by a building set back at that minimum.

Submitted by the Planning Board

The Planning Board and Warrant Committee will report on this Article.

Two-thirds vote required for passage.

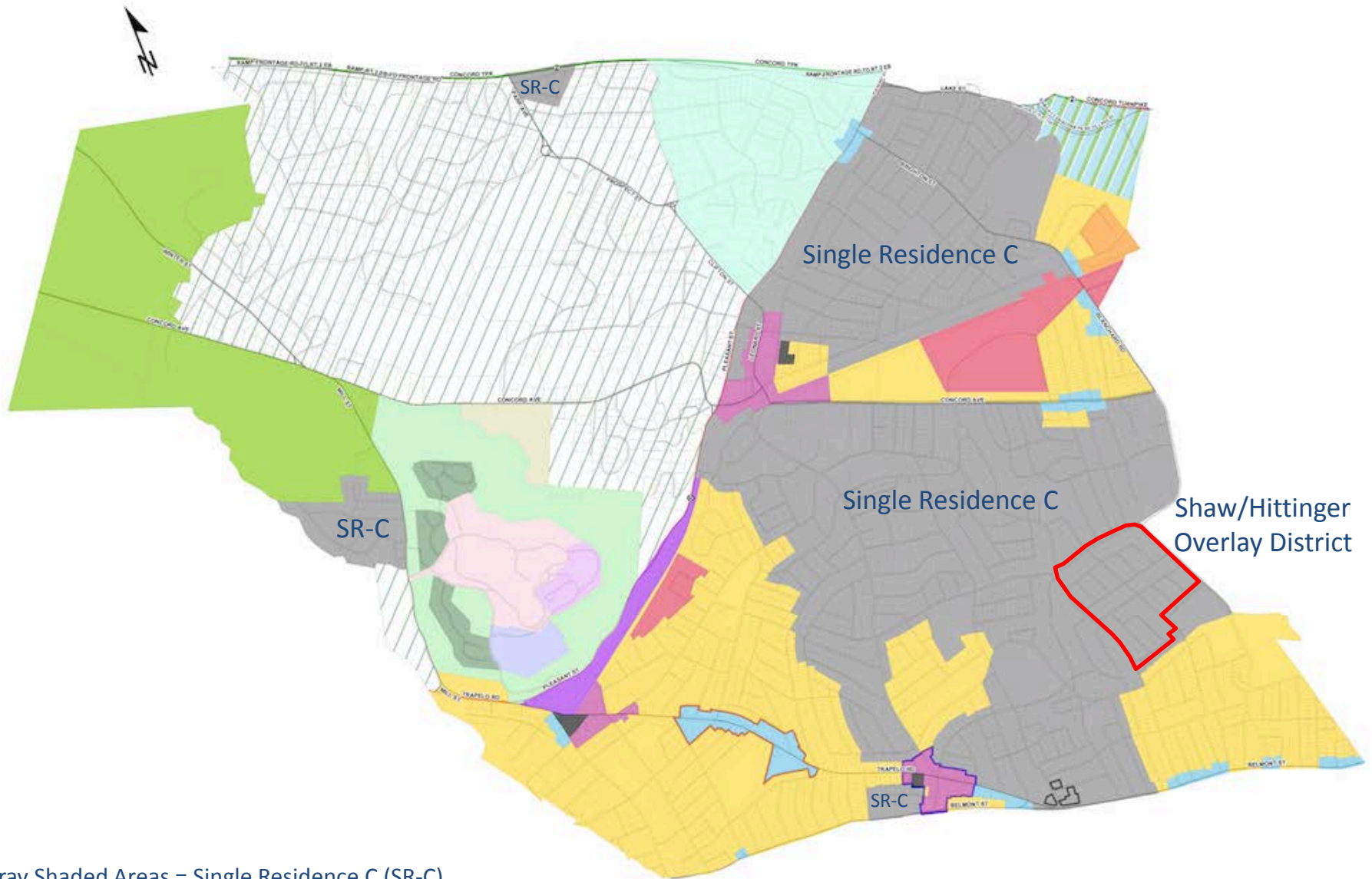
**ARTICLE 7:**

**FY17 COMMUNITY PRESERVATION COMMITTEE BUDGET  
& PROJECTS**

To see if the Town will vote to hear and act on the report of the Community Preservation Committee on the FY2017 Community Preservation budget and, pursuant to the recommendations of the Community Preservation Committee, to appropriate from the Community Preservation Fund, or to reserve amounts in the Community Preservation Fund for future appropriations, for the administrative expenses of the Community Preservation Committee for FY2017; for the acquisition, creation and preservation of open space - including land for recreational use; for the acquisition, preservation, rehabilitation and restoration of historic resources; and for the creation, preservation and support of community housing; Or act in any other manner in relation thereto.

Amount	Project Name	Category	Funding Source
\$228,350	Construction of Intergenerational Walking Path at Clay Pit Pond	Open Space/ Recreation	Open Space/ Recreation Account/Unallocated Account
\$ 80,000	Preserving Belmont's Original Vital Records	Historic Preservation	Historic Preservation Account
\$ 85,000	Digitizing Belmont's Town Meeting Records	Historic Preservation	Historic Preservation Account
\$ 75,000	Town Hall Exterior Railings Improvements	Historic Preservation	Historic Preservation Account
\$ 25,000	Bequossette Park Revitalization	Recreational Land	Open Space/ Recreation Account/Unallocated Account
\$325,000	Winn Brook Tennis Courts	Recreational Land	Open Space/ Recreation Account/Unallocated Account

# Single Residence C Zoning Districts



Gray Shaded Areas = Single Residence C (SR-C)



**Second Amendment to Warrant Article 6**  
Submitted by Robert McGaw (Precinct 1)

Purpose: Many houses in SR-C Zoning Districts have non-conforming side setbacks. As summers get hotter, more people will be installing central air conditioning, which requires a ground-mounted compressor/condenser unit to be located adjacent to the house. The pipes circulating the coolant for efficiency need to go directly from the outside compressor/condenser unit to the air-handling equipment, which is typically located in the attic. The purpose of this amendment is

1. to continue to allow installation of ground-mounted mechanical equipment (e.g., heat pump compressor units and air conditioning compressor/condenser units for central air conditioning) in the side yards of SR-C houses, but only if they comply with the Town's noise Bylaws and are screened to minimize visual impacts,
2. to simplify the definition of front yard, and
3. to clarify screening.

MOVED: That the motion made by the Planning Board under paragraph 4 of Article 6 be amended by substituting for item '2' under subsection A, Setbacks, of section 4.2.2 of the Zoning Bylaw as proposed by the Planning Board the following item '2':

2. In the SR-C Districts, the placement of ground-mounted outdoor mechanical equipment and fuel storage equipment occurring after the effective date of this item 2, on a lot containing a single- or two-family structure shall be subject to the following requirements:
  - a. Not within the front yard, which for purposes of this item 2 is defined to be the area between the front line of the lot and a line obtained by extending the front elevation of the structure to each of the sidelines of the lot;
  - b. Not within the required side or rear setbacks; provided, however, that ground-mounted outdoor mechanical equipment may encroach entirely or partially into a required side setback if (i) it is placed adjacent to the structure, (ii) it does not extend more than six feet from the structure, (iii) it complies with items c. and d. below, and (iv) it complies with applicable noise standards in the General Bylaws of the Town of Belmont;
  - c. Not within 5'-0" of the front yard as defined in item a. above; and
  - d. Screened to minimize visual impacts.

**Fourth Amendment to Warrant Article 6**  
Submitted by Robert McGaw (Precinct 1)

Purposes of this Amendment:

To clarify that the Building Commissioner can issue a Building Permit for a proposed reconstruction, extension, alteration, or structural change to a non-conforming single- or two-family structure if the conditions in any of the three clauses 1), 2), and 3) are met.

To clarify that clauses 1) and 2) in the second unnumbered paragraph apply to a “reconstruction,” “extension,” or “structural change” as well as an “alteration,” since all four types of change are referred to in the first unnumbered paragraph as well as in the third unnumbered paragraph.

To correct the punctuation and use of the relative pronouns “which” and “that.” When “which” is used as a relative pronoun to introduce a clause, “which” is properly used in the descriptive sense and commas set off the clause. When “that” is used as a relative pronoun to introduce a clause, it is used in the restrictive sense and no comma is needed.

MOVED: That the substitute motion made by the Planning Board amending section 1.5.4 of the Zoning Bylaw be amended by substituting for the unnumbered second paragraph (including subparagraphs 1), 2) and 3) of that paragraph) of subsection B, clause (1) as proposed by the Planning Board, the following new second paragraph to read as follows:

The Building Commissioner may issue a Building Permit if the conditions in any of the following three clauses are met: ~~[under the following circumstances:]~~

- 1) A reconstruction, extension, alteration, or structural change to a structure that ~~[which]~~ complies with all current setbacks, open space, lot coverage and building height requirements but is located on a lot with insufficient area and/or frontage;
- 2) A reconstruction, extension, alteration, or structural change to a structure that ~~[which]~~ encroaches upon one or more required setbacks, where the reconstruction, extension, alteration, or structural change will comply with all current setbacks, open space, lot coverage and building height requirements. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements; or



- 3) A half-story addition to a nonconforming structure [~~deleted comma~~] that will not increase the footprint of the existing structure, create a new dimensional nonconformity or extend an existing dimensional nonconformity, provided that the existing height restrictions shall not be exceeded. This clause shall apply regardless of whether the lot complies with the current area and/or frontage requirements.

[NOTE: the additions are identified by double-underscoring; deletions are shown with ~~double-strikethrough~~ and [brackets] .

**Fifth Amendment to Warrant Article 6**  
Submitted by Robert McGaw (Precinct 1)

The purpose of this amendment is to clarify that Section 6D of the Zoning By-Law does not govern the voluntary demolition of a nonconforming single- or two-family structure, since Section 6D governs development and reconstruction.

NOTE: Section 1.5.5 of the Zoning By-Law governs restoration of nonconforming structures after fire or other casualty.

Moved: To amend the last sentence of the paragraph labeled “General Residence Zoning Districts” in paragraph 2.b of Article 6 to read in its entirety as follows:

On lots that do not comply with the minimum area requirements of this Zoning By-Law (including the minimum lot area per dwelling unit), preexisting non-conforming single- and two-family structures that are ~~[may not be]~~ voluntarily demolished may not be ~~and~~ reconstructed except in accordance with a Special Permit issued by the Planning Board under Section 6D of this Zoning By-Law.

[NOTE: the additions are identified by double-underscoring; deletions are shown with ~~double-strikethrough~~ and [brackets].

#6

Amendment to Warrant Article 6  
Submitted by Chris Kochem (Precinct 8)

RECEIVED  
TOWN CLERK  
BELMONT, MA

2016 JUN -1 PM 12: 20

The purpose of this amendment is

1. that Section 4.2.2, subsection A.2.c be amended so that the minimum distance for the placement of mechanicals in the side yard in relation to the front elevation is changed from 10'0" to 5'0".

Moved: To amend Section 4.2.2, subsection A.2.c, of Warrant Article 6 by deleting 10'-0" and replacing it with 5'0" so that the section reads as follows:

c. Not within at least 5'-0" of the front elevation; and

Submitted by:  
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Town Meeting Member, Precinct 8

#7

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2016 JUN -1 PM 3:46

**Article 6 Proposed Amendment  
Submitted 6/1/2016 by Anthony Ferrante (Precinct 8)**

MOVED: That Section 1.5.4.B. (5), paragraph a) be amended such that the words "and design" shall be deleted so the section reads in whole:

(5) In making any Special Permit decision pursuant to this section 1.5.4.B. (2) or (3), the Planning Board shall consider the following:

- a) Scale of the structure;
- b) The siting of the structure and driveway;
- c) Walkway, driveway and parking circulation;
- d) Exterior lighting;
- e) Open space and screening; and,
- f) Drainage.

**Original, showing proposed changes**

(5) In making any Special Permit decision pursuant to this section 1.5.4.B. (2) or (3), the Planning Board shall consider the following:

- a) Scale ~~and design~~ of the structure;
- b) The siting of the structure and driveway;
- c) Walkway, driveway and parking circulation;
- d) Exterior lighting;
- e) Open space and screening; and,
- f) Drainage.

**Explanatory Note:**

In Single Residence C only 28% of the lots are over 9,000 square feet which means that significant expansion of most homes in that district will require a Special Permit. The purpose of this amendment is to clarify that property owners should have the right to build homes that appeal to their personal sense of aesthetics. The Planning Board may consider all other aspects of the proposed project listed above.

#8

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2016 JUN -1 PM 3: 25

Amendment to Warrant Article 6  
Submitted by Anthony Ferrante & Christine Kochem (Precinct 8)

The purpose of this amendment is

1. to add a new section 4 after Section 1.5.4, subsection B.1.3 so as to continue to allow single-story houses in Single Residence C to build a full-story addition 'by-right', so long as the proposed addition does not increase the footprint of the existing structure

Moved: To amend Warrant Article 6 by adding a new section after Section 1.5.4, subsection B.1.3 by inserting a new section 4 that reads as follows:

4) A full second-story addition to a single-story, nonconforming structure (a single-story structure is defined as a structure with a second level that is not habitable according to the State Building Code; i.e., floor to ceiling height is too low, light and ventilation is limited, room size is too small or egress is not provided) that will not increase the footprint of the existing structure, create a new dimensional nonconformity or extend an existing nonconformity, provided that the existing height restrictions shall not be exceeded. This clause shall apply regardless of whether the lot complies with the current area and/or-frontage requirements.

Submitted by:  
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Town Meeting Member, Precinct 8

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Town Meeting Member, Precinct 8

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2016 JUN -1 PM 2:20

#9

## Article 6 Proposed Amendment

Submitted June 1, 2016 by Paul Roberts (Precinct 8)

**MOVED: THAT** Warrant Article 6 be amended such that the words "4.2.1 'Area Requirements'" be added to the existing wording, so that the section reads, as a whole (changes in bold):

That the Town vote to amend the Zoning By-Law pertaining to Sections 1.4, "Definitions and Abbreviations," 4.2.1, "**Area Requirements**" and 4.2.2, "Linear Requirements for Residential Districts", as set forth under Article 6, subparts 1, 3, 4 and 5 of the Warrant for this Town Meeting. (Two-thirds vote)

**AND THAT** Article 6, subpart 3 be replaced in its entirety with the following:



3. To see if the Town will vote to amend Section 4.2.1 Area Requirements and Section 4.2.2, Linear Requirements for Residential Districts as follows:

- a. Within the dimensional table "Area Requirements" in Section 4.2.1, change the values for SR-C as follows: Minimum Lot Area: **5,000**; Minimum Lot Frontage: **50**; Maximum Lot Coverage: **30%**, Minimum Open Space: **40%**, such that the modified table appears as follows:

#### 4.2.1 Area Requirements

	Minimum Lot Area	Minimum Lot Frontage	Minimum Lot Area Per Dwelling Unit	Maximum Floor Area Ratio	Maximum Lot Coverage	Minimum Open Space
Districts	Sq. Ft.	Feet	Sq. Ft./D.U.		% Of Lot	% Of Lot
SR-A	25,000	125	--	--	20%	50%
SR-B	12,000	90	--	--	25%	50%
<b>SR-C</b>	<b>5,000</b>	<b>50</b>	--	--	<b>30%</b>	<b>40%</b>
SR-D	25,000	125	--	--	20%	50%
GR	5,000	50	3,500	--	30%	40%
AH	85,000	100	1,200	--	30%	40%
LB I	--	20	--	1.25	--	--
LB II	--	20	--	1.05	--	--
LB III	--	20	--	1.05	35%	--
GB	--	20	--	--	--	--
PL	--	--	--	--	--	--

- b. Within the dimensional table “Linear Requirements for Residential Districts” in section 4.2.2, remove “SR-C” from the row labeled “SR-B and SR-C” and to add “**SR-C**” to the row labeled “GR” such that the final table appears as follows:

**4.2.2 Linear Requirements for Residential Districts**

Residential Districts	Minimum Setback Dimensions Feet			Maximum Building Height	
	Front	Side	Rear	Feet	Stories
SR-A and SR-D					
• Dwelling	30	15	40	36	2½
• Other	30	15	25	36	2½
SR-B					
• Dwelling	25	10	30	36	2½
• Other	25	10	25	36	2½
<b>GR and SR-C</b>					
• Dwelling	20	10	20	33	2½
• Other	20	10	12	33	2½
AH	30	30	30	30	30

**Finally, in section 4.2.2 part A; item 3 should be amended to read:**

Notwithstanding the front setback requirement listed in Section 4.2.2, the front setback for the GR **or SR-C** District shall not exceed the average of the front setbacks of the buildings on the lots contiguous thereto on either side. A vacant lot, a lot occupied by a building set back more than the required minimum, or an intersecting street shall be counted as though occupied by a building set back at that minimum.



## Originals, showing proposed changes

That under Article 6, the reading of the proposed Amendment to the Zoning By-Law pertaining to Sections 1.4, "Definitions and Abbreviations" 4.2.1, "Area Requirements" and 4.2.2, "Linear Requirements for Residential Districts", be dispensed with, the same being set forth in full under Article 6, subparts 1, 3, 4 and 5 of the Warrant for this Meeting and having been distributed to each Town Meeting Member. (Majority vote)

That the Town vote to amend the Zoning By-Law pertaining to Sections 1.4, "Definitions and Abbreviations," 4.2.1, "Area Requirements" and 4.2.2, "Linear Requirements for Residential Districts", as set forth under Article 6, subparts 1, 3, 4 and 5 of the Warrant for this Town Meeting. (Two-thirds vote)

### 4.2.1 Area Requirements

	Minimum Lot Area	Minimum Lot Frontage	Minimum Lot Area Per Dwelling Unit	Maximum Floor Area Ratio	Maximum Lot Coverage	Minimum Open Space
Districts	Sq. Ft.	Feet	Sq. Ft./D.U.		% Of Lot	% Of Lot
SR-A	25,000	125	--	--	20%	50%
SR-B	12,000	90	--	--	25%	50%
<b>SR-C</b>	<b>9,000-5,000</b>	<b>75 50</b>	--	--	<b>25%-30%</b>	<b>50%-40%</b>
SR-D	25,000	125	--	--	20%	50%
GR	5,000	50	3,500	--	30%	40%
AH	85,000	100	1,200	--	30%	40%
LB I	--	20	--	1.25	--	--
LB II	--	20	--	1.05	--	--
LB III	--	20	--	1.05	35%	--
GB	--	20	--	--	--	--
PL	--	--	--	--	--	--

#### 4.2.2 Linear Requirements for Residential Districts

Residential Districts	Minimum Setback Dimensions Feet			Maximum Building Height	
	Front	Side	Rear	Feet	Stories
SR-A and SR-D					
• Dwelling	30	15	40	36	2½
• Other	30	15	25	36	2½
SR-B and SR-C					
• Dwelling	25	10	30	36	2½
• Other	25	10	25	36	2½
GR and SR-C					
• Dwelling	20	10	20	33	2½
• Other	20	10	12	33	2½
AH	30	30	30	30	30

#### A. Setbacks

1. Ornamental features, such as belt courses, chimneys, eaves, gutters, sills, pilasters, or lintels, may project up to two feet into the setback.
2. No building need be set back more than 30% of the depth of the lot in a Single Residence A or D District, 25% of the lot depth in a Single Residence B or C District, nor more than the average of the setbacks of the buildings on the lots contiguous thereto on either side, a vacant lot, a lot occupied by a building set back more than the required minimum, or an intersecting street being counted as though occupied by a building set back at that minimum. However, in no case shall the setback be less than 15 feet in Single Residence Districts.
3. Notwithstanding the front setback requirement listed in Section 4.2.2, the front setback for the GR or SR-C District shall not exceed the average of the front setbacks of the buildings on the lots contiguous thereto on either side. A vacant lot, a lot occupied by a building set back more than the required minimum, or an intersecting street shall be counted as though occupied by a building set back at that minimum.
4. On lots having depth of less than 100 feet, dwelling setback from the rear lot line shall equal not less than 40% of lot depth in the Single Residence A and D Districts, not less than 30% of lot depth in Single Residence B and C Districts, and not less than 20% of lot depth in General Residence Districts; but in no event shall the rear setback equal less than 25 feet in Single Residence Districts or less than 16 feet in General Residence Districts. 5. In the SR Districts, the Board of Appeals may grant a Special Permit reducing the rear setback requirement of corner lots and other unusually



configured lots to not less than the side requirement, taking into consideration the configuration of the lot, and the effect upon the neighboring property

**Explanatory Note:**

Belmont's current zoning by-laws categorize the vast majority of the town's residential neighborhoods as Single Residence Zone C (or SR-C) for short. These SR-C zones include many of our most iconic neighborhoods: the 19<sup>th</sup> century Victorians on School Street, the 1930s and 40s era Colonials in the Winn Brook area, around Payson Reservoir, and so on. These are closely settled neighborhoods with modest houses on small(ish) lots – almost all less than a quarter acre.

However, as currently written, the town's SR-C zoning simply does not reflect the reality of our built environment. Specifically: SR-C mandates 9,000 square foot lots (almost a quarter acre) and 75 feet of frontage. While this is nice in an aspirational kind of way, it simply does not reflect the type of housing stock that has been constructed in Belmont over the last 150 years – the kind of houses and neighborhoods most of us live in and consider as defining our town's residential character.

How badly out of whack are the zoning requirements for SR-C? Consider that today; close to 3 out of every 4 houses in SR-C zoned neighborhoods are non-conforming in one way or another. As a practical matter: that means that homeowners who seek to make even modest changes or additions to their property must receive a special permit from the Planning Board to do so – an uncertain, time-consuming and potentially expensive prospect.

It is this dislocation between our residential zoning and the reality of our built environment that makes the debate about the Planning Board's proposed rules so fraught. Simply put: these are rules meant to deal with *exceptions* to our bylaws. But, because almost all of us live in non-conforming homes, exceptions to our bylaws are the rule and these changes end up affecting almost everyone.

Fortunately, we do have a residential zoning on the books in Belmont with dimensions for home and lot size, setbacks and the like that nicely reflect the neighborhoods most of us inhabit: the **General Residence (or GR) zone**. GR zones currently lie adjacent to many of our town centers (Leonard Street, Cushing Square, Waverly Square) and are often interwoven with and indistinguishable from SR-C districts, except as concerns our zoning bylaws. Walk from Bellevue Rd. on one side of Chenery Middle School over to Hurd Rd. on the other side and you've walked from a GR to a SR-C zone, but you wouldn't know it.

My proposed amendment is simple and straightforward. It would leave many of the proposed changes in Article 6 – intended to deal with exceptions to our zoning bylaws- intact. But, importantly, it would bring many of our SR-C zoned neighborhoods and homes into compliance with our by-laws by harmonizing the current SR-C zone with the General Residence zone and, most important, with our built environment. SR-C, like GR, will be defined by a minimum lot size (5,000 square feet) and frontage (50 feet). The maximum lot coverage (30%) and minimum open space per lot (40%) will also be the same for GR and SR-C zones.

How will this affect you, as a homeowner? Let's consider a couple use cases that would be typical for many of us:

**Winn Brook Colonial**

**Lot size:** 8,640 sq ft.

**Frontage:** 60'

**Building size:** 1,735 sq. feet

**Built:** 1934

**Zone:** SR-C

Current minimum lot area: 9,000 sq. feet

Current minimum lot frontage: 75 feet

Current maximum lot coverage: 2,160 (25%)

Current min. open space: 4,320 (50%)

Current status: *does not conform*

Under proposed changes:

Proposed minimum lot area: 5,000 sq. feet - conforms

Proposed minimum lot frontage: 50 feet - conforms

Proposed maximum lot coverage: 2,592 (30%) - conforms

Proposed min. open space: 3,456 sq. feet (40%) - conforms

Overall Status: *conforms*

**Goden Street Victorian**

**Lot size:** 8,050 sq. ft.

**Frontage:** 60'

**Building size:** 2,705 sq. feet

**Zone:** SR-C

Under proposed changes:

Proposed minimum lot area: 5,000 sq. feet - conforms

Proposed minimum lot frontage: 50 feet - conforms

Proposed maximum lot coverage: 2,415 (30%) – does not conform

Proposed min. open space: 3,220 sq. feet (40%) - conforms

Overall Status: *does not conform*

**Hurd Rd Colonial (Payson area):**

**Lot size:** 6,534 sq. ft.

**Frontage:** 60'

**Building size:** 2,010 sq. feet

**Zone:** SR-C

Under proposed changes:

Proposed minimum lot area: 5,000 sq. feet - conforms

Proposed minimum lot frontage: 50 feet - conforms

Proposed maximum lot coverage: 2,415 (30%) - conforms

Proposed min. open space: 3,220 sq. feet (40%) - conforms

Overall Status: *conforms*