

## 2017 Town Meeting Warrant Articles: TABLE OF CONTENTS

Art. #	Title (shaded articles are proposed for inclusion on the Consent Calendar to be voted under Article 2)	Vote quantum	Page #	Recommendations	
				Finance Committee	Board of Selectmen
1	Choose Town Officers			-----	-----
2	Hear Reports/Consent Calendar	2/3rds		-----	-----
3	Meeting Procedure	majority		Affirmative Action	Affirmative Action
4	Ratify Personnel Board Classification Actions	majority		Affirmative Action	Affirmative Action
5	Classification & Compensation	majority		Affirmative Action	Affirmative Action
6	Personnel Bylaw Amendment	majority		Affirmative Action	Affirmative Action
7	Town Budget	2/3rds		Affirmative Action in the amount of \$40,943,520	Affirmative Action in the amount of \$40,943,520
8	Municipal Building Renovations	2/3rds		Affirmative Action in the amount of \$350,000	Affirmative Action in the amount of \$350,000
9	Public Safety Communications Equipment	2/3rds		Affirmative Action in the amount of \$225,000	Affirmative Action in the amount of \$225,000
10	Fire Engine #8 Replacement	2/3rds		Affirmative Action in the amount of \$575,000	Affirmative Action in the amount of \$575,000
11	Ambulance #1 Replacement	2/3rds		Affirmative Action in the amount of \$260,000	Affirmative Action in the amount of \$260,000
12	Leasing of Town Land Bylaw	Majority		Affirmative Action	Affirmative Action
13	Concord Public School Budget	Majority		Affirmative Action in the amount of \$36,810,111	Recommendation will be made at Town Meeting
14	FY2017 Concord Public Schools Supplemental Appropriation	Majority		Recommendation will be made at Town Meeting	Recommendation will be made at Town Meeting
15	Concord Public Schools Renovations	2/3rds		Affirmative Action in the amount of \$850,000	Affirmative Action in the amount of \$850,000
16	Concord-Carlisle Regional High School Budget	Majority		Affirmative Action in the amount of \$17,935,005	Recommendation will be made at Town Meeting
17	Concord-Carlisle RSD - Landfill Remediation	Majority		Affirmative Action in the amount of \$1,200,000	Affirmative Action in the amount of \$1,200,000
18	Minuteman Regional High School Budget	Majority		Affirmative Action in the amount of \$599,313	Affirmative Action in the amount of \$599,313
19	Free Cash Use	Majority		Affirmative Action in the amount of \$1,000,000	Affirmative Action in the amount of \$1,000,000
20	PETITION - Reducing the Influence of Money in Politics	Majority			Recommendation will be made at Town Meeting
21	Establish Revolving Fund – Rental Income from Farms	Majority		Affirmative Action	Affirmative Action
22	PEG Access and Cable-Related Fund	Majority		Affirmative Action in the amount of \$560,000	Affirmative Action in the amount of \$560,000
23	Authorize Acquisition of 55 Church Street	2/3rds		Affirmative Action in the amount of \$1,200,000	Affirmative Action in the amount of \$1,200,000
24	Funding for Telecommunications Services	2/3rds		Affirmative Action in the amount of \$1,000,000	Affirmative Action in the amount of \$1,000,000
25	Funding for Technology Improvements	2/3rds		Affirmative Action – Article to be taken at STM	No motion is expected
26	Smart Grid Improvements	2/3rds		Affirmative Action in the amount of \$3,000,000	Affirmative Action in the amount of \$3,000,000
27	Comprehensive Municipal Facility Needs Study	2/3rds		Affirmative Action in the amount of \$250,000	Affirmative Action in the amount of \$250,000
28	PETITION Guideline of Public Access to Open Space	Majority			Recommendation will be made at Town Meeting
29	Community Preservation Committee Recommendations	Majority		Affirmative Action in the amount of \$1,326,340	Affirmative Action in the amount of \$1,326,340
30	CPC Recommendation for Junction Village Affordable Assisted Living Development	Majority		Recommendation will be made at Town Meeting	Recommendation will be made at Town Meeting
31	Bruce Freeman Rail Trail – Grant of Easement to MBTA	2/3rds			Affirmative Action
32	Accept Easements – Brookside Square Development	Majority			Affirmative Action
33	Grant of Easement to W.R. Grace	2/3rds			Affirmative Action
34	Grant of Easement over 26A Balls Hill Road	2/3rds			No motion is expected
35	Zoning Bylaw Amendment – Site Plan Review	2/3rds			Affirmative Action
36	Zoning Bylaw Amendment – Professional Office	2/3rds			Recommendation will be made at Town Meeting
37	Zoning Bylaw Amendment – Nonconforming Single and Two Family Residential Structures	2/3rds			Affirmative Action
38	Zoning Bylaw Amendment – Residential Uses	2/3rds			Affirmative Action
39	Zoning Bylaw Amendment – Marijuana Moratorium	2/3rds			Recommendation will be made at Town Meeting
40	General Bylaw - Tree Preservation Bylaw	Majority			Affirmative Action
41	Tree Preservation Revolving Fund	Majority		Affirmative Action	Affirmative Action
42	PETITION Alternative use Proposal Forest Ridge Rd.	2/3rds		Affirmative Action	Affirmative Action
43	PETITION Release of Restriction to Forest Ridge Rd.	2/3rds			Affirmative Action
44	Regional Housing Services Revolving Fund Expenditures	Majority		Affirmative Action in the amount of \$235,000	Affirmative Action in the amount of \$235,000
45	Road Repair Revolving Fund Expenditures	Majority		Affirmative Action in the amount of \$120,000	Affirmative Action in the amount of \$120,000
46	Cemetery Roads and Infrastructure Improvements	2/3rds		Affirmative Action in the amount of \$150,000	Affirmative Action in the amount of \$150,000
47	2017 Roads and Parking Lots Program	2/3rds		Affirmative Action in the amount of \$1,415,000	Affirmative Action in the amount of \$1,415,000
48	Senior Means-Tested Property Tax Exemption	Majority		Affirmative Action	Affirmative Action
49	PETITION Home Rule Legislation - Affordable Housing	Majority		Recommend NO ACTION	Recommendation will be made at Town Meeting
50	PETITION Fund Testing of Hives for Neonicotinoid	Majority		No motion is expected	No motion is expected
51	Concord's Energy Goals	Majority		Recommendation will be made at Town Meeting	Recommendation will be made at Town Meeting
52	Unpaid Bills	4/5ths		No motion is expected	No motion is expected
53	Light Plant Expenditures & Payment in Lieu of Taxes	Majority		Affirmative Action in the amount of \$474,000	Affirmative Action in the amount of \$474,000
54	Solid Waste Disposal Fund Expenditures	Majority		Affirmative Action	Affirmative Action
55	Sewer System Expenditures	Majority		Affirmative Action	Affirmative Action
56	Sewer Improvement Fund Expenditures	Majority		Affirmative Action	Affirmative Action
57	Water System Expenditures	Majority		Affirmative Action	Affirmative Action
58	Beede Swim & Fitness Center Enterprise Expenditures	Majority		Affirmative Action	Affirmative Action

**TOWN MEETING  
MONDAY, APRIL 24, 2017 – 7:00 PM  
CONCORD-CARLISLE REGIONAL HIGH SCHOOL**

**PARKING**

Town Meeting attendees should enter from the Walden Street entrance. Walden Street will allow for exiting and entering motor vehicles and parking will be restricted to the right hand side of the road as you enter only. The Thoreau Street gate will be for exit only and parking will be allowed on both sides all motor vehicles facing out.

Handicap parking and “for those needing to be close” will be designated in the front row of the main parking lot on the East end of the lot closest to the East entrance to the cafeteria. This location is the main entrance for the Town Meeting and where check-in and ballot distribution will take place. There are also additional handicap spaces at the front of the school.

Parking will be allowed in all designated spaces as well as the turf field parking lot. Parking will also be allowed in front of the Beede Center if necessary as well as in the lower end of the Beede parking lot. In the event that the parking lots at the high school are full, attendees will be directed to Alcott School first and, once Alcott is full, then the Concord District Court. Shuttle buses will be available to bring residents to and from the satellite parking.

**CHILDCARE**

Childcare will be provided at the high school in the maroon gym for children 2 1/2 and older. The Concord Recreation Department is offering the service at a cost of \$5 per child per hour. In order to guarantee a space, reservations should be made in advance by calling the Concord Recreation Department at 978 287-1050.

**SENIORS**

Seniors may arrange transportation with the Council on Aging office @ 978 318-3020. Advance reservations are necessary as seats are limited and offered on a first come first serve basis.

**CHECK-IN**

All voters who were registered to vote by **March 8, 2017** are eligible to participate at Town Meeting. Voters should check-in at the tables in the main lobby by last name and pick up a Town Meeting ballot on each night of attendance. Only one ballot per voter per evening of attendance. Ballots are not transferrable.

**SEATING**

Seating is available in the gymnasium only. It will be the main meeting room and the only location where votes will be counted.

**ASSISTED LISTENING DEVICES**

Assisted Listening Devices will be available in the lobby.

**SPECIAL ARRANGEMENTS OR NEEDS**

Anyone with a disability requiring special arrangements for Town Meeting should contact Kate Hodges, Assistant Town Manager/ADA Coordinator before 4:30 p.m. on Monday, April 18, 2017 at (978) 318-3000. The earlier special arrangement needs are communicated, the more likely special accommodations will be met, if possible.

**REFRESHMENTS**

Light refreshments will be available for purchase in the Dining Commons (cafeteria) beginning at 6:30 p.m. The following options will be available- juices, flavored waters, granola bars, yogurt, muffins, cookies, hummus & chips, salsa & chips and pre-made salads. The items will be CASH ONLY – credit cards will not be able to be accepted.

**TELLERS**

Voters willing to be a teller at Town Meeting are asked to call Abe Fisher, head teller at (978) 869-9233 or e-mail at [abefisher@misterfisher.com](mailto:abefisher@misterfisher.com).



The Finance Committee thanks the town and school administrations, employees and committees for the cooperation and assistance during the past year.

### **Terms to expire 2017**

Terri S. Ackerman  
Karle S. Packard  
Wendy Rovelli  
Thomas Tarpey  
Brian Taylor

### **Terms to expire in 2018**

Richard Jamison  
Linda Miller  
C. Thomas Swaim  
Philip C. Swain  
Triveni Upadhyay

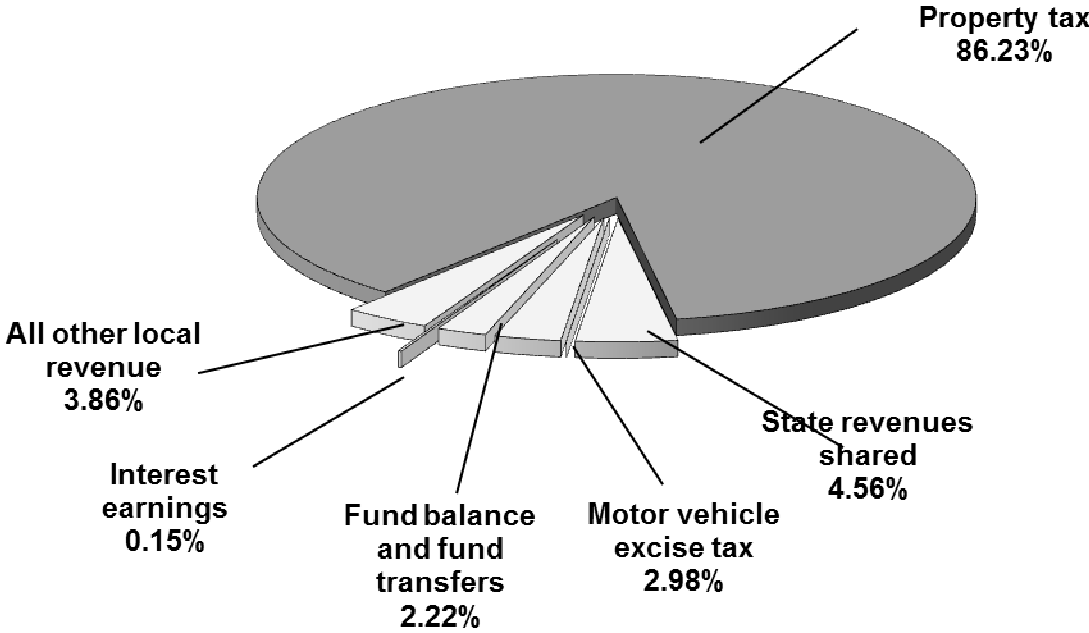
### **Terms to expire in 2019**

Dean S. Banfield  
Scott Randall  
June Rzepczynski

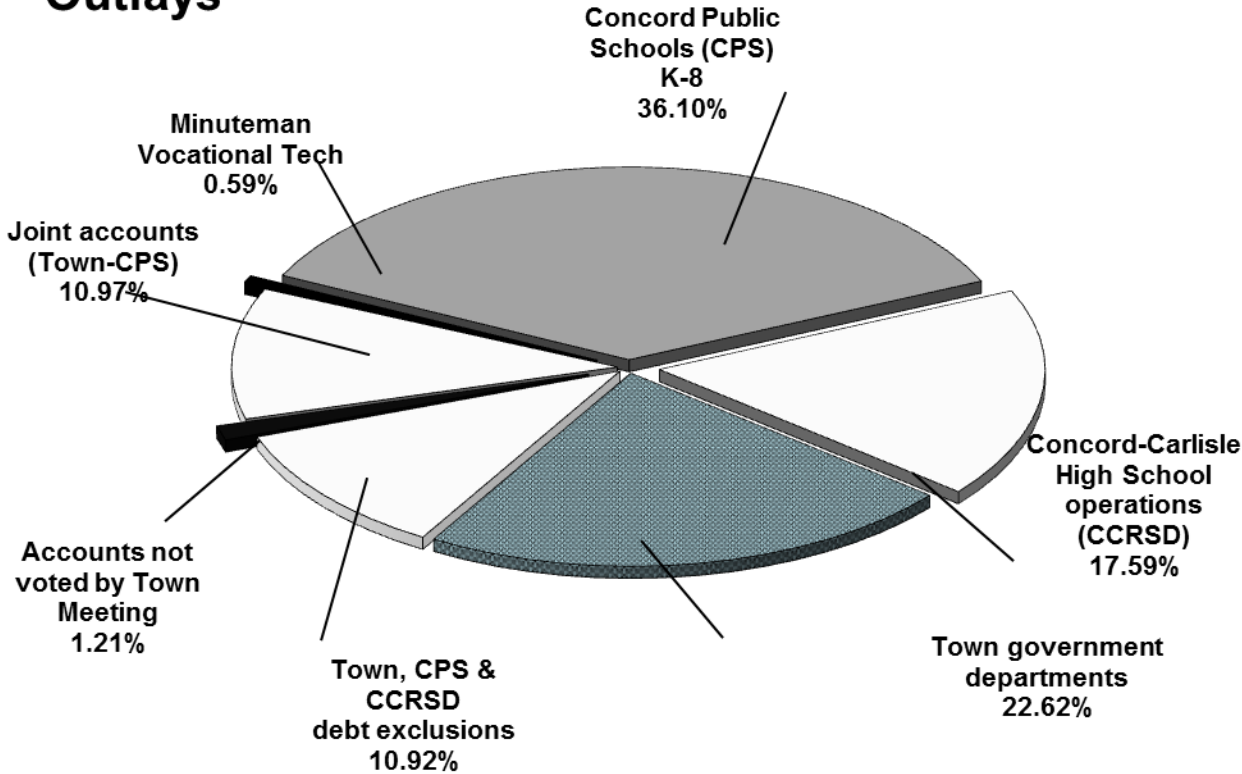
This report of the Concord Finance Committee was prepared with the assistance of the Concord Finance Department.

**General Fund**  
**FY18 PROPOSED BUDGET**  
 Operating budgets of town and schools  
 Total Budget: \$101,968,859 (+3.79%)

**Income**



**Outlays**



# The Budget in Brief

## Total Budget: Town Government and Education at Finance Committee recommendations

- The total proposed FY18 General Fund budget is \$101,968,859. This is a \$3,719,277 or 3.79% over FY17. This amount is \$102,000 higher than what is showing in the FY2018 Town Manager's Proposed Budget Book, due to an increase in the estimated Minuteman Regional Technical High School District Assessment.
- Concord's share of the debt service payable on bonds and notes issued or to be issued by the Concord-Carlisle Regional School District is estimated at \$3,664,067, a decrease of \$84,904. Of this amount, \$3,561,484 is for exempt debt for the School Building, and \$102,583 is non-exempt debt for the bus depot.
- The allocation to the Town's OPEB Trust Fund is proposed at \$1,470,000, an increase of \$70,000, and the Town's assessed share of the CCRSD OPEB Trust Fund contribution is approximately \$540,665.
- The current year snow account deficit to be raised in the FY18 budget is estimated at \$179,000.
- The Town government and education proposed operating budgets total \$77,809,129, which is 4.1% over FY17 operating budgets.
- Nearly 58% of the proposed FY18 spending plan is for expenses related to primary and secondary education.
- Total debt service (principal and interest payments on long and short-term debt) is budgeted at \$11,131,574. The tax levy for debt service excluded from the Proposition 2 ½ levy limit, in accordance with previous town-wide ballot votes, is \$6,381,790, which represents 6.26% of the total proposed budget.
- Long term bonds have been issued for the financing of the new Alcott, Thoreau and Willard schools opened in 2004, 2006 and 2009 respectively. The total debt issued, principal to be repaid through June 30, 2015 and the FY16 debt service amounts are:

Project	Debt Issued	Outstanding Amount	FY18 Debt Service	
		as of 06/30/16	Principal	Interest
Alcott	\$ 9,365,000	\$ 3,887,900	\$ 494,000	\$ 100,505
Thoreau	\$ 16,940,000	\$ 4,114,400	\$ 581,000	\$ 139,930
Willard	\$ 27,025,000	\$ 16,680,000	\$ 1,480,000	\$ 555,475
	\$ 53,330,000	\$ 24,682,300	\$ 2,555,000	\$ 795,910

## Property taxes

- The median single family residential tax bill in FY17 is \$11,529 based on an assessed value of \$819,400 at a tax rate of \$14.07 per thousand.
- The tax rate projected increase is 3.09% (an additional \$356 on the median bill, \$48 per \$100,000 of assessed valuation).
- Each 1% increase in the tax levy equals \$840,500 in revenue for FY18.
- 86.2% of the Proposed Budget support is derived from property taxes.
- 75.9% of property taxes are paid by single family residential property.

## Free Cash Use

- The Finance Committee recommends allocating \$1,000,000 from Free Cash to support the FY18 budget plan (Article 19). Additional Free Cash allocations are sought as follows: Article 14 - \$400,000; Article 23 - \$1,200,000; Article 30 - \$1,000,000; and Article 51- \$200,000. Free Cash is a term denoting the available portion of the undesignated General Fund balance.

**The Proposed Guideline Budget Appropriation  
for the year beginning July 1, 2017 (FY18)**

*Recommendations of the Finance Committee  
Articles 7, 13, 16, 18 comprising the Guideline Budget*

	FY18: Warrant location reference	Appropriated FY17	Proposed FY18	percent change	percent of total
<b>Town Government</b>					
General Government	Art. 7, items 1-6	\$ 2,895,694	\$ 2,885,019	-0.37%	2.8%
Finance & Admin; Inf. Systems	Art. 7, items 7-10	2,333,799	2,453,175	5.12%	2.4%
Public Safety (Police & Fire)	Art. 7, items 11-16	9,253,145	9,307,693	0.59%	9.1%
Public Works	Art. 7, items 17-24	4,203,351	4,265,349	1.47%	4.2%
Library	Art. 7, item 25	2,136,945	2,142,218	0.25%	2.1%
Reserve Fund	Art. 7, item 28	225,000	225,000	0.00%	0.2%
Salary Reserve	Art. 7, item 33	28,065	793,923	--	0.8%
Recreation and all other	Art. 7, items 26-31, 34	888,015	991,637	11.67%	1.0%
<b>Total Town Gov't operations @</b>	<b>General Fund Guideline</b>	\$ 21,964,014	\$ 23,064,014	5.01%	22.6%
Emergency services Stabilization Fund		50,000	0		
	<b>Subtotal, Town Gov't</b>	\$ 22,014,014	\$ 23,064,014	4.77%	22.6%
<b>Concord Public Schools (CPS)</b>					
	Article 13	\$ 35,660,111	\$ 36,810,111	3.22%	36.1%
<b>Concord-Carlisle Regional HS</b>					
	Operations	\$ 17,035,005	\$ 17,935,005	5.28%	17.6%
(Concord's assessment share)	Debt Service	3,748,971	3,664,067	-2.26%	3.6%
	Article 16	\$ 20,783,976	21,599,072	3.92%	21.2%
<b>Town and School (CPS) debt service</b>					
debt repayment within levy limit		\$ 3,730,000	\$ 3,860,000	3.49%	3.8%
debt excluded from levy limit		3,007,828	2,822,507	-6.16%	2.8%
<b>Total tax-supported</b>	Art. 7, item 39	\$ 6,737,828	\$ 6,682,507	-0.82%	6.6%
High School Debt Stabilization	Article 7	1,000,000	785,000		0.8%
	<b>total debt service</b>	\$ 7,737,828	\$ 7,467,507	-3.49%	7.3%
<b>Employee Benefits (Town and CPS only):</b>					
Group Insurance	Art. 7, item 35A	\$ 4,650,000	\$ 4,800,000	3.23%	4.7%
OPEB Trust	Art. 7, Item 35B	1,400,000	1,470,000	5.00%	1.4%
Retirement (pension funding)	Art. 7, item 37	3,317,000	3,667,000	10.55%	3.6%
Social Security & Medicare	Art. 7, item 38	765,000	810,000	5.88%	0.8%
<b>Total Employee Benefits</b>		\$ 10,132,000	\$ 10,747,000	6.07%	10.5%
<b>Minuteman Tech Regional HS</b>	Art. 18	\$ 423,443	\$ 602,000	42.17%	0.6%
<b>Property &amp; liability insurance</b>	Art. 7, item 35C	250,000	250,000	0.00%	0.2%
<b>Unemployment/Worker's Comp</b>	Art. 7, item 36	200,000	200,000	0.00%	0.2%
<b>TOTAL Town Meeting appropriations</b>		\$ 97,201,372	100,739,704	3.64%	98.8%
<b>Not Appropriated:</b>					
State assessments (mostly for MBTA)		\$ 495,310	\$ 500,500	1.05%	0.5%
Snow & Ice expense account deficit		0	178,655		0.2%
Overlay for tax exemptions and abatements		552,900	550,000	-0.52%	0.5%
		\$ 1,048,210	\$ 1,229,155	17.26%	1.2%
<b>TOTAL SPENDING PLAN</b>		\$ 98,249,582	\$ 101,968,859	3.79%	

## To the residents of Concord

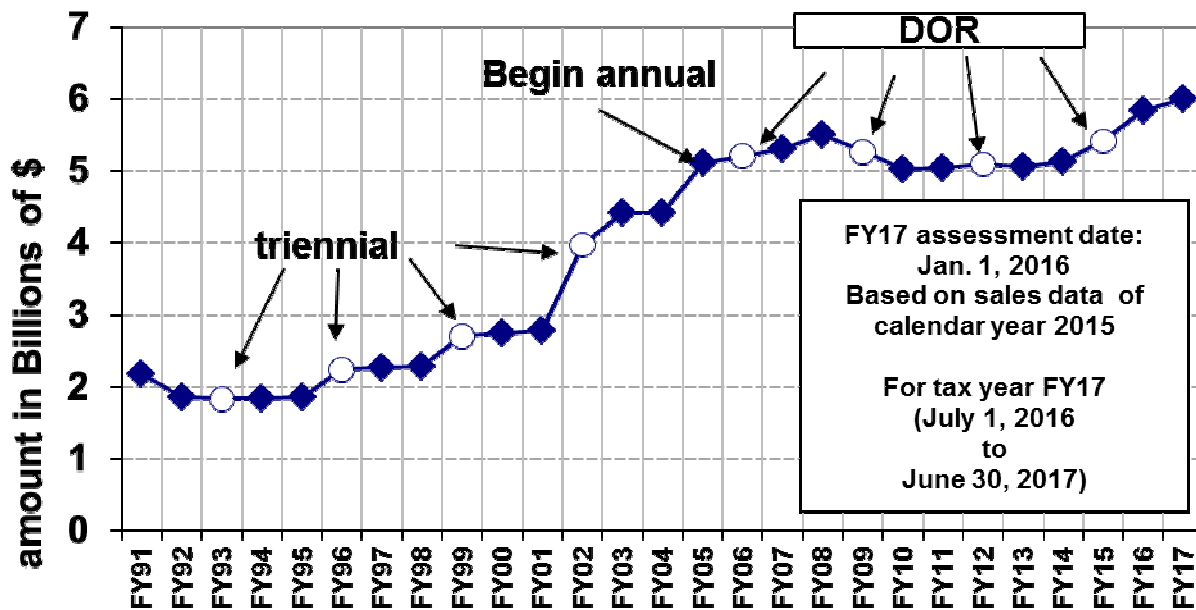
The annual report of the Concord Finance Committee summarizes the financial position of the Town and discusses the articles on the warrant for the 2017 Annual Town Meeting.

### Overview

The outlook for both the national and Massachusetts economies remains positive. National unemployment rates have been declining steadily to levels below 5%. However, growth rates of gross domestic product (GDP) expanded only moderately in 2016, up 1.6%, the lowest rate of increase since 2011. Massachusetts, and particularly the Boston region, has been performing above the national average in both GDP and job growth measures. Uncertainty and volatility have been high, reflecting global economic conditions and events and the changes anticipated from the results of the recent presidential election.

Locally, Concord has continued to show strong economic activity; a reinvigorated growth in population and increases in local residential real estate valuations. Total assessed value has risen 16.4% over the past three years with residential values increasing 17.7%. In FY17, the average single family home had an assessed value of \$987,567.

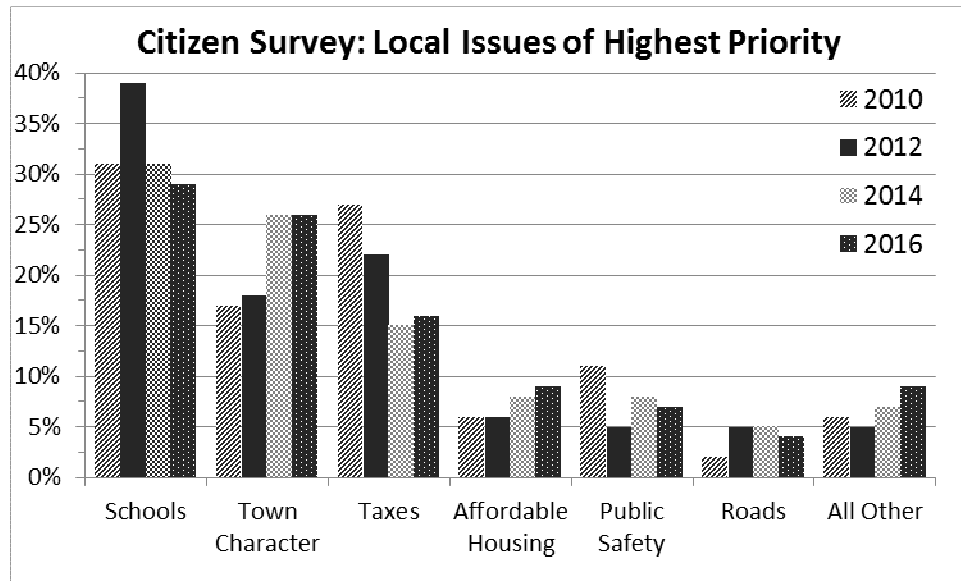
### Taxable Assessed Valuation



The overall level of building activity in 2016, as measured by total permits issued increased 2% to 2,881. Trends in local motor vehicle excise taxes also continued to rise reflecting strong consumer spending locally.

Other factors which reflect the well-being of our community come from residents directly. As of December 2016, the Town completed its biennial survey of Concord residents to measure satisfaction with the quality of services from Town government and satisfaction with public services relative to taxes and /or prices paid. Over 90% of respondents thought that Town services were “excellent” or “good”. When asked about which local

issue is of highest priority, citizens continue to rank schools as their greatest priority. Concerns regarding taxes appear to have dropped with an increased focus on Town character.



### Concord's Fiscal Position

Concord has traditionally taken a conservative approach to budgeting. The Finance Committee seeks to maintain operating cost increases within certain criteria to meet a goal of financial sustainability over the long term. In addition, the Finance Committee believes that it is important for the Town to maintain flexibility to deal with future infrastructure needs as well as unanticipated expenses and other contingencies.

These criteria include:

- Setting modest expectations for revenue growth, with estimates of property tax growth from new construction and renovations based only on known development activity for which there is high likelihood of completion in the upcoming fiscal year;
- Keeping tax increases from depleting excess levy limit capacity so that general overrides are not required;
- Maintaining the uncommitted General Fund Balance ("Free Cash") at levels at or above 5% of the subsequent year's total Town Budget--
  - in practice, the Finance Committee has in recent years supported keeping Free Cash at levels closer to 10%, as a stronger reserve position during periods of uncertain economic conditions;
- Supporting capital needs by routinely dedicating 7-8% of total budget resources for capital improvements--
  - roughly 1/3<sup>rd</sup> of capital financing is derived from current resources and 2/3<sup>rd</sup> is derived from debt financing through the issuance of long-term bonds,
  - principal repayment is structured so that most bonded debt (60%) is retired within five years, and 90% is retired within 10 years; and
- Taxpayers are not burdened beyond what typical expectations of income growth can accommodate.

The Town's Free Cash position and debt policies are key factors in maintaining the Town's credit rating of Aaa, which it has held since 1987.

Each year as the Finance Committee reviews and evaluates operating budget needs, consideration is given to long-term priorities of the Town, how Concord compares to other peer towns and the general trend in tax increases over time. We are sensitive to the rate at which taxes are increasing compared to local incomes and property values. If taxes exceed the rate of income growth over extended periods of time, the tax rate can become unsustainable to the point where affordability becomes problematic for some households. The Finance Committee recognizes this is of great concern to homeowners living on low or fixed incomes.

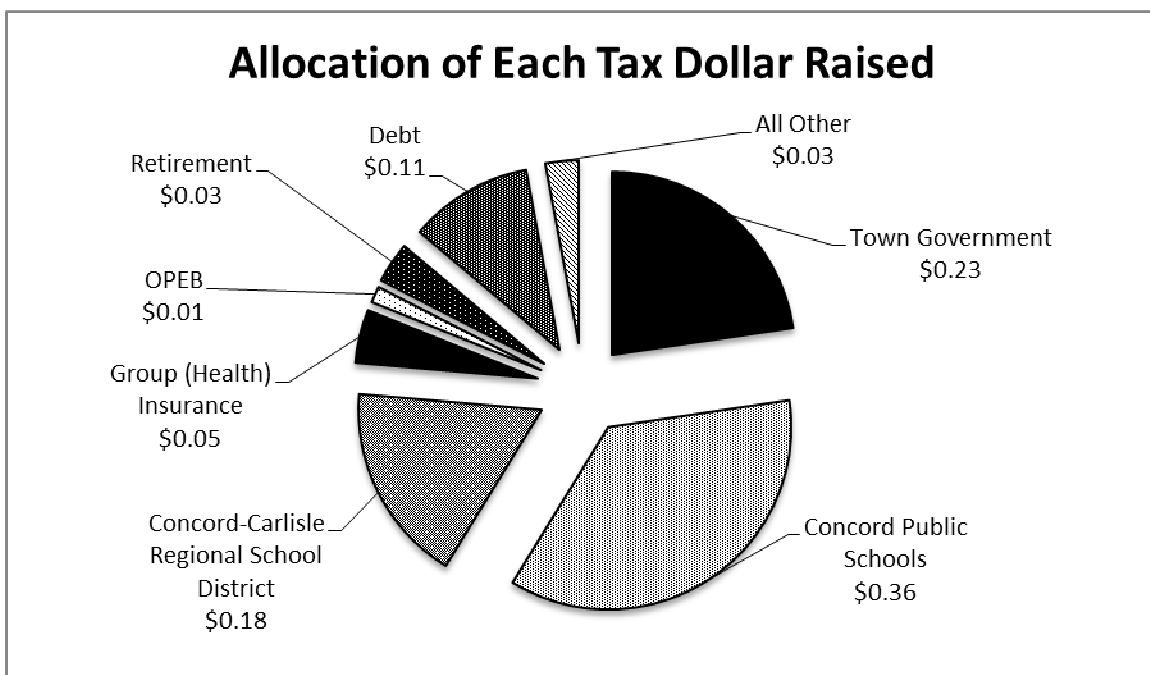
### **FY18 Budget Guideline**

The proposed FY18 Total Budget for Concord is \$101,968,859, based on the Finance Committee's FY18 Budget Guideline recommendations, issued November 30, 2016 and updated in March following a review of updated General Fund projections of resources and expenses, which resulted in an increase in the Minuteman Regional Vocational Technical School District's Assessment of \$102,000. This figure does not include operations of the Town that are supported by fee-for-service activities such as those of the Concord Municipal Light Plant.

The FY18 Guideline adopted by the Finance Committee:

- directs \$3,100,000 of incremental funds to the operating budgets, a 4.15% increase over FY17 operating budget levels;
- results in a total FY18 General Fund spending plan of \$101,968,859, which would be an increase of 3.79% over the adopted FY17 budgets;
- assumes an overall increase of 3.24% in the tax bill to existing taxpayers, inclusive of Exempt Debt; and
- maintains an unused levy capacity of \$3,777,410 (which is 4.43% under the projected levy limit).

For each tax dollar raised to fund the Total General Fund Budget, the proposed uses are:



The Town Operating Budget (*23% of tax dollars*) request submitted by the Town Manager in his budget document of February 16, 2017 is at the Finance Committee Guideline of \$23,064,013 and provides \$1,050,000 in incremental funding over FY17, an increase of 4.77% (Article 7 of the Annual Town Meeting Warrant).

The Concord Public School (CPS) Committee (*36% of tax dollars*) did not adopt the Finance Committee Guideline recommendation. That guideline would have provided CPS a budget increase of \$1,150,000 or 3.22%. Rather the CPS Committee, in Article 13, requests a 3.89% increase to \$37,046,694, which is \$236,584 above the spending guideline.

The Concord-Carlisle Regional School District (CCRS) Committee (*18% of tax dollars*) voted to adopt the Finance Committee Guideline recommendation. This provides CCRSD an increase of which Concord's share will increase by 5.28% or \$900,000 to \$17,935,005 (Article 16).

The assessment for the Minuteman Regional Vocational Technical School District is \$599,313, as voted by the Minuteman School Committee. It is currently being carried at \$602,000 in the Finance Committee's final guideline. This difference will be correct prior to setting the FY18 Tax Rate. This is a steep increase from the previous year because of an increase in enrollment of Concord students at Minuteman.

In addition to the operating budgets, a significant part of the budget is for Debt Service (*11% of tax dollars raised*). The proposed FY18 debt service cost is as follows: \$3,860,000 for routine projects, within the levy limit, for Town and CPS projects such as road repairs and building renovations; \$3,607,507 for Town and CPS excluded debt projects mostly for new elementary schools; and \$3,561,484 for the CCRSD excluded debt assessment for the new CCRSD high school building and \$102,583 of non-excluded debt for school buses, for a total debt service assessment of \$3,664,067.

Other non-operating budget expenses include Other Post-Employment Benefits (OPEB- primarily health insurance for retired personnel) and retirement contributions (*5% of tax dollars*). While headline news reports that some municipal retirement systems across the country seem to be in trouble, in Concord, this isn't the case as we have followed a consistent policy of funding the employer contribution. Totaling \$3,667,000 in FY18, this represents an increase of 10.5% from the previous year. As of January 1, 2016, the Town's net Pension Liability is estimated to be \$29.1 million and its funded ratio is about 83%, a ratio that is ranked among the top 10 public retirement systems in the State.

Group Insurance, or employee health care costs, is anticipated to accelerate in FY18 after several years of flat to modest increases (*5% of tax dollars*). Factors that have helped keep increases manageable are the Town's membership in Minuteman Nashoba Health Group, a joint purchasing consortium of 17 area towns that pool risks and self-funds health plans to keep costs down. As compared to other Massachusetts municipalities, the percent of Concord's employer contribution for health care premium is on the low side: approximately 55% for active employees and 50% for retirees. In addition, a 2011 State health care reform law enabled the Town to negotiate plan design changes with the stipulation that 25% of the first-year savings were placed in a fund to mitigate subscriber out-of-pocket cost.

The Town of Concord will derive the majority (85.1%) of the FY18 General Fund resources from property taxes. State Aid will contribute 4.4%, a modestly increasing amount over the past 4 years. Other sources such as Motor Vehicle Excise Taxes and Fees are closely aligned to citizen purchasing decisions.

With these assumptions, the projected FY18 increase in real estate taxes to existing citizens is estimated at 3.09%, exclusive of exempt debt, over the FY17 levy. Based on the FY17 median single family residential home value of \$819,400 (and tax rate of \$14.07 per thousand) the median tax bill is project to increase by \$356

to \$11,885 from \$11,529 (or \$48 per each \$100,000 of assessed value). This is an increase in terms of percentage over the FY17 tax increase of 1.6% and is consistent with the Finance Committee's desire to keep tax increases below 4.0% on a town-wide average given today's low rate of inflation.

As of June 30, 2016, Certified Free Cash was a healthy \$12,605,955 or 12.8% of the current year budget. The FY18 budget will maintain this level of Free Cash, while still providing a \$1 million allocation for Town operations to reduce the tax levy. Contributions from Free Cash are made to help support the budget plan each year, in an amount approximately equal to 1% of the total spending plan and that we can reasonably expect will be restored by positive operating results of the budget year. When Free Cash exceeds 10% of the Town's next budget, contributions to stabilization funds or funding of warrant articles are often considered for recommendation to the Town Meeting. In a higher interest rate environment, early repayment of debt also might be considered.

The unused levy capacity, the amount that the projected tax levy is below the allowable Proposition 2 ½ levy limit, is projected to be \$3,777,410 in FY18. This means that the Town has some flexibility in future budgets since we are not at the upper ceiling of the levy limit as determined by an increase of 2 ½% from the previous levy limit plus an allowance for new growth.

### **Budget Drivers**

To understand the drivers affecting the budget each year, the Finance Committee meets throughout the fall with the Town Manager and school administration. We consider trends in salaries, wages and benefits, special education, additional costs for school bus transportation, capital improvements and evolving service demands from citizens. We evaluate planned contribution towards pensions and health insurance commitments for retired public employees (OPEB) and the impact of debt obligations for previously approved as well as anticipated projects. Notable drivers impacting this year's budget include:

- *Salaries and hiring:* The largest component of Town, CPS and CCRSD budgets is the salary of our employees. In the school system, salary expense is driven by collective bargaining agreements which establish salary structures for a three-year period. Increases from a new CPS teacher's contract are reflected in this year's budget, but larger increases are expected in next year's budget. In addition, CPS proposes to add 3 ½ positions in world languages and additional time for tutors, aides and substitute teachers to support teachers' co-curricular activities, special education and the pre-school program. The CCRSD's bargaining unit, the Concord-Carlisle Teachers Association (CCTA), recently began negotiations with school administration for a new contract.

The Town is less dependent on labor agreements, but is continually challenged to retain staff at salaries that are competitive in the market place. In addition, a number of positions that had been funded by outside sources are now added to the General Fund, including the Energy Conservation Coordinator (shared with the Concord Municipal Light Plant), the Visitors Center (formerly operated by the Concord Chamber of Commerce), Community Services Coordinator and Youth Services Coordinator; as well as increases in funding for the Regional Housing Services Office, increased hours for the Assistant Building Inspector, Library staff for weekend hours, Outreach Coordinators and Van Drivers, and Public Health Nurse, staffing of the 2<sup>nd</sup> Ambulance in West Concord, and also new positions of Fire Inspection Lieutenant and Assistant Highway & Grounds Superintendent.

- *Economic Activity and Population Growth:* With the growth in housing construction and the attractiveness of new schools, student enrollment has been increasing steadily in the last few years. Since October 2011, there has been a noticeable increase in students at both the Concord Middle School (CMS) and CCRSD. Rising enrollments put pressure on our school system in terms of staffing for instruction, class size and space needs.
- *Shifts in high school enrollment between Concord and Carlisle:* The percentage of Concord student residents is used to determine Concord's allocation of the CCRSD budget, including debt expense associated with the new high school building. This ratio is decreasing slightly from 73.61% in FY17 to 73.51% for FY18.
- *Other school needs:* CCRSD plans to implement a later start time. This will require both an increase in the Schools' bus fleet and drivers. Scheduled are the purchase of 6 additional buses (one a replacement vehicle) and hiring of 5 new drivers.
- *OPEB:* Both the Town and CCRSD have established a plan for regular increases in funding to meet its Annual Required Contribution (ARC), which is the point at which regular contributions will match future liabilities. Recent actuarial analysis of these liabilities suggests the Town will meet its ARC with the FY2017 budget, earlier than expected a few years ago. However, health insurance expenses are expected to increase in future years and therefore these liabilities will continue to fluctuate over time. CCRSD has established an OPEB Trust and has revised its planned contribution schedule to meet its ARC in 2020. The CCRSD proposed FY18 budget includes a contribution to the OPEB Trust of \$735,500. The Finance Committee is supportive of this commitment and took it into account when setting the Guideline this year. The Town proposed FY18 budget includes an increase of \$70,000 for its OPEB Trust funding for a total contribution of \$1,470,000, which meets the required ARC.
- *Shift in demographics and service demands:* With the increase in housing and construction throughout town, along with aging of the population, the Town is experiencing new demands on public services provided by various departments. The Town Manager's budget will accommodate funding for increases in Fire Preventions staffing and inspections; additional staff hours are proposed to meet demands for the Public Health Nurse coverage and the Veterans Services. The General Funds will accommodate a greater share of the Full-Time Equivalents (FTE) expense for staffing the second ambulance. This daytime service operated out of the West Concord Fire Station, inaugurated July 2011, and has resulted in improvements in response time. It is the Town's intention to staff 24-hour schedule by FY2019 which would require four additional firefighter/EMS positions.

### **Looking ahead**

While the Town and schools are in sound financial condition and continually update their long-range plans to address anticipated future needs, there are a number of matters that the Finance Committee is concerned may have a significant impact on the future tax burden of residents.

The high school building project has proven to be a huge success and came in on plan and on budget. Now that the new school building is complete, attention is drawn to the remaining remediation of the eastern parking lot adjacent to the old high school. The remediation solution – to cap the private landfill operation

that existed up to the 1950s before the land was purchased for the new Concord-Carlisle Regional School District in 1956—will involve creation of an engineered barrier and will require limitations on use of the land in the future. The cost of remediation has been estimated by an engineering firm at \$1.1 million. Article 17 seeks Town Meeting approval of the Regional School Committee’s \$1.1 million borrowing authorization for this purpose. Beyond this immediate need, the CPS Committee initiated a study of the Concord Middle School’s physical plant. The recommendations of this study could include a major renovation or new building for the 6<sup>th</sup> through 8<sup>th</sup> grade.

**Article 26.** Smart-Grid Improvements will allow the Concord Municipal Light Plant to accelerate its investment in smart-grid technology. To fully exploit this enhanced capability, additional investments in technology (much of which is just becoming realized in the marketplace) may be possible in the future. Expenses for these investments will ultimately be covered by increased charges to ratepayers of CMLP.

**Article 27.** Comprehensive Municipal Facility Needs Study, if approved, will provide the Town with a comprehensive analysis of municipal facility and space needs. Public Works, Planning, Human Services and general government space needs are the focus. As well, the recommendations of this study could include renovation of existing buildings or construction of new facilities to modernize and enhance the efficiencies of municipal operations in the future.

**Article 29.** Community Preservation Committee (CPC) Appropriation Recommendations continues a history of Concord’s participation in the Community Preservation Act (CPA). State matching funding for the CPA has diminished over time as State resources have been stretched and as more cities and towns have joined the program and taken advantage of matching funds. In the future, to maintain a current rate of project funding, the CPC could request an increase in its tax surcharge from the current 1.5% to as high as 3% as allowed by the Commonwealth.

**Article 30.** Appropriation Recommendation for the Junction Village Affordable Assisted Living Development addresses the limited availability of affordable housing in Concord. If approved this proposal will address one segment of the need for affordable housing—assisted living for the elderly. However, if citizens desire to maintain a Town character that offers diverse housing choices additional projects targeting affordable housing may be appropriate for future consideration.

## **Conclusions**

Contained within this report are additional summaries and budget details which citizens will find useful in evaluating Town warrant articles, as well as background on issues and trends that various town committees have been addressing and which have a financial bearing on the Town. In addition, we encourage citizens to also view detailed budget reports that are available online, or at the library, including: The Town Manager’s Proposed FY18 Budget; the Town Manager’s Proposed FY18 Enterprise Budget; the Superintendent’s FY18 Proposed Budget for Concord-Carlisle Regional School District (CCRS); and the Superintendent’s FY Proposed Budget for the Concord Public Schools (CPS). These books contain a wealth of additional information and will provide extensive background and details on all budget items.

The Town and School finances are well managed, as evidenced by the long-standing Aaa bond ratings of the Town and the Concord-Carlisle Regional School District, and the ability to meet and exceed the growing demand from citizens for high quality public services. Meeting these needs is a challenge and we commend the Town Manager, Chris Whalen, and the Superintendent of Schools, Diana Rigby for their leadership and creativity in balancing resources and priorities to meet these needs. We also express our deepest thanks to

the Town Finance Director, Kerry Lafleur, and the Deputy Superintendent, John Flaherty, and their respective staffs, for their dedicated and careful management of the Town finances and for their patience and expertise on advising the Finance Committee throughout the year.

## Notes

The Concord Finance Committee was established by Town bylaw in 1921 and is comprised 15 members appointed by the Moderator for staggered three-year terms. By tradition, members serve no more than two terms. By this arrangement, there is always a mix of new and experienced members and a mix of new points of view and institutional memory. The appointment process is designed so that the Finance Committee remains independent of the Town's administrative structure and elected boards.

The Finance Committee has the following responsibilities:

- Establishing fiscal guidelines for the Town Manager, the Concord Public School Committee, and the Concord-Carlisle Regional School Committee in preparing their budgets. Under Town by-law, these guidelines must be published by the end of November each year.
- Conducting public hearings on the budgets and other financial matters expected to come before annual and special Town Meetings.
- Preparing this report for distribution to all residents, including recommendations on warrant articles before the Annual Town Meeting and a summary of the Town's financial status.
- Managing a Reserve Fund account to meet extraordinary and unforeseen expenditures (proposed at \$225,000 for FY18).

Individual committee members are assigned as observers to attend public meetings of other Town boards and committees. Reports from these observers are included in the Observer Reports section of this document. It is important to emphasize that the role of the Finance Committee is limited to making recommendations. The Finance Committee regularly makes recommendations to Town Meeting, the Town Manager, the Board of Selectmen, the school committees, the Superintendent of Schools, other boards and committees, and the citizens of the Town. Responsibility for making decisions is reserved to the citizens through Town Meeting and Town elections and to staff members, boards, and committees to whom specific responsibilities have been delegated by Town by-law and/or State Law.

That being said, The Finance Committee's recommendation for the allocation of the limited resources within the Levy Limit has the de facto force of a formal decision. This is because the three major budgetary entities—the Town Manager, Concord Public Schools, and the Concord-Carlisle Regional School District—have constituencies of roughly equal weight. As a practical matter, therefore, any one entity is rarely able to increase its share at the expense of the others without the Finance Committee's support.

### **Finance Committee Policies**

For many years, the Finance Committee has had a set of long-range financial policies for prudent financial management of the Town. Starting in FY06, the Town began to document its financial policies in the Town Manager's annual budget in a comprehensive way, following the recommended practices of the Government

Finance Officers Association of the United States and Canada (GFOA). The following is a summary of some of these policies, from the perspective of the Finance Committee.

- Maintain a minimum fixed percentage of the annual budget in Free Cash. This forms the core of the Town's reserves and its working capital.
- Spend about 7% to 8% of the annual budget on routine recurring capital maintenance and renewal of the Town's facilities and infrastructure (including schools). Included in this, up to 5% is reserved for debt service for large items and projects funded by borrowing with debt service to be supported within the property tax levy limit and therefore, for this component of the capital program, without resort to debt exclusion ballots.
- Avoid earmarking of revenues, except as established by statute or local bylaw enacted by Town Meeting. All other revenues go into the General Fund, where they form part of the current year resources and/or contribute to Free Cash for future years.
- Maximize the efficiency of capital within aggressive program of repayment of debt principal, thereby minimizing the proportion of debt service paid in interest and making tax dollars go farther.
- Adjust these policies only gradually and deliberately, not in response to the pressure of the moment.
- In general, the Finance Committee's position is that debt service within the Levy Limit should be focused on routine things over which the Town has little discretion, e.g. roofs, roads, equipment, workspaces for employees. Debt exclusion financing should be reserved for community amenities that are direct additions or improvements in basic services and that would otherwise push essential maintenance out of the capital budget.

## **Budget Process**

The budget process begins each summer when the Finance Committee formulates a series of requests for information from the Town Manager and School Superintendent regarding overall trends and issues. In September, a joint coordination meeting is held, including the Finance Committee, the Board of Selectmen, the School Committees, the Carlisle Board of Selectmen and the Carlisle Finance Committee. During this meeting, the general parameters of revenues, state aid, and fixed costs are laid out, along with matters of coordination between the two towns regarding the Regional School District.

During the fall, the Town Manager and the School Superintendent begin their annual budget process with their own department managers. In October, the Guideline Subcommittee of the Finance Committee meets with each of them to begin to frame the allocation of resources within the Levy Limit and any overrides for the coming fiscal year. This is presented to the full Finance Committee, which publishes its Tentative Guideline by the end of October. During November, the Guideline Subcommittee again meets with the Town Manager and School Superintendent to finalize the recommended Guideline. This Guideline is published by the Finance Committee no later than the end of November.

School budgets are voted by the School Committees early January, in time for summarizing in the Town Manager's proposed budget. By Town Charter, the Town Manager's budget proposal must be presented to the Board of Selectmen 90 days before the start of Town Meeting. About two months before Town Meeting, the Town and Education budgets are presented for public comment at the Finance Committee's public hearings. The period between these hearings and Town Meeting is for resolving issues, addressing comments and questions, and refining the budgets.

**Property Tax Impact of Proposed FY18 Budget at Finance Committee Budget Guidelines**

**Projected Tax rate Impact**

**3.09%**

Tax Bill at median \$819,400 value

\$ 11,529

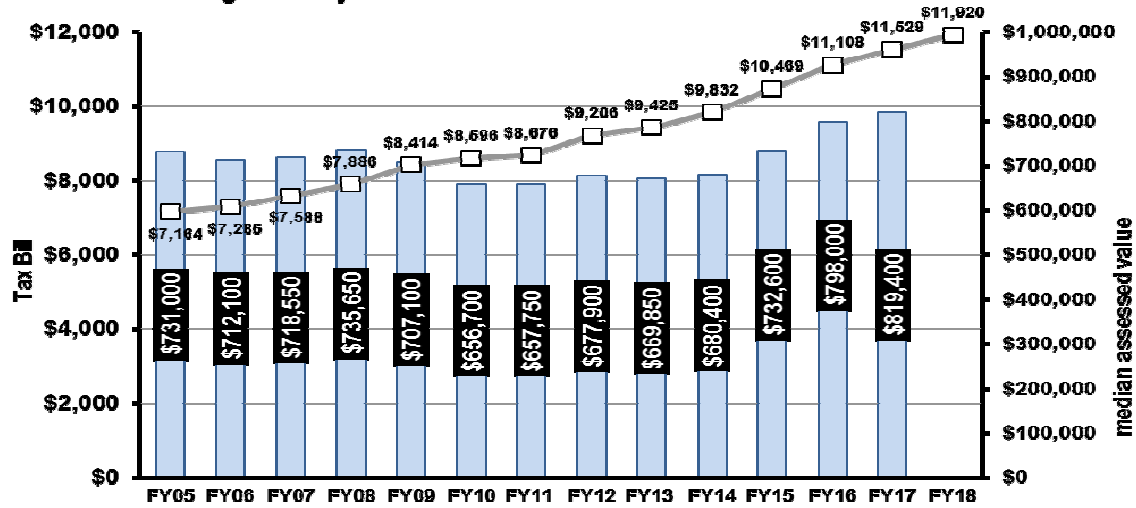
+ 356 = \$ 11,885

Tax Bill per \$100,000 a.v.

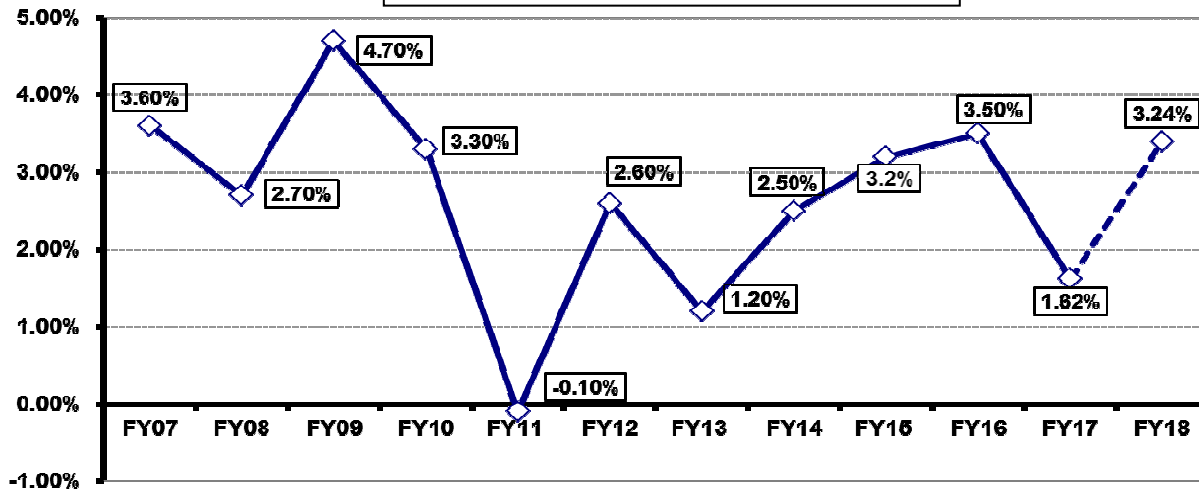
\$ 1,409

+ 48 = \$ 1,457

**Single Family residential median value and tax bill**



**Increase to Existing Taxpayer, FY07 - 18**



## ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR TAX BILL

	Median Average												
	350,000	450,000	500,000	600,000	700,000	819,400	987,566	1,050,000	1,200,000	1,350,000	1,500,000	1,600,000	1,750,000
Fiscal Values	350,000	450,000	500,000	600,000	700,000	819,400	987,566	1,050,000	1,200,000	1,350,000	1,500,000	1,600,000	1,750,000
Fiscal 2017 Taxes	4,925	6,332	7,035	8,442	9,849	11,529	13,895	14,774	16,884	18,995	21,105	22,512	24,623
Fiscal 2017 Base	4,584	5,894	6,549	7,813	9,168	10,732	12,859	13,752	15,717	17,681	19,646	20,956	22,920
FY2017 Debt Exemption	340	438	486	629	681	797	1,036	1,021	1,167	1,313	1,459	1,556	1,702

To calculate the dollar impact of any additional expenditures that may be considered by Town Meeting, use this chart below.

Article Amount	350,000	450,000	500,000	600,000	700,000	819,400	987,566	1,050,000	1,200,000	1,350,000	1,500,000	1,600,000	1,750,000
10,000	0.59	0.75	0.84	1.00	1.17	1.37	1.65	1.76	2.01	2.26	2.51	2.68	2.93
25,000	1.46	1.88	2.09	2.51	2.93	3.43	4.13	4.39	5.02	5.65	6.28	6.70	7.32
50,000	2.93	3.77	4.18	5.02	5.86	6.86	8.27	8.79	10.04	11.30	12.55	13.39	14.65
75,000	4.39	5.65	6.28	7.53	8.79	10.29	12.40	13.18	15.07	16.95	18.83	20.09	21.97
100,000	5.86	7.53	8.37	10.04	11.72	13.72	16.53	17.58	20.09	22.60	25.11	26.78	29.29
150,000	8.79	11.30	12.55	15.07	17.58	20.58	24.80	26.37	30.13	33.90	37.66	40.18	43.94
200,000	11.72	15.07	16.74	20.09	23.44	27.43	33.06	35.15	40.18	45.20	50.22	53.57	58.59
250,000	14.65	18.83	20.92	25.11	29.29	34.29	41.33	43.94	50.22	56.50	62.77	66.96	73.24
300,000	17.58	22.60	25.11	30.13	35.15	41.15	49.60	52.73	60.26	67.80	75.33	80.35	87.88
350,000	20.51	26.37	29.29	35.15	41.01	48.01	57.86	61.52	70.31	79.10	87.88	93.74	102.53
400,000	23.44	30.13	33.48	40.18	46.87	54.87	66.13	70.31	80.35	90.40	100.44	107.14	117.18
450,000	26.37	33.90	37.66	45.20	52.73	61.73	74.39	79.10	90.40	101.70	112.99	120.53	131.83
500,000	29.29	37.66	41.85	50.22	58.59	68.58	82.66	87.88	100.44	112.99	125.55	133.92	146.47
550,000	32.22	41.43	46.03	55.24	64.45	75.44	90.93	96.67	110.48	124.29	138.10	147.31	161.12
600,000	35.15	45.20	50.22	60.26	70.31	82.30	99.19	105.46	120.53	135.59	150.66	160.70	175.77
700,000	41.01	52.73	58.59	70.31	82.03	96.02	115.72	123.04	140.62	158.19	175.77	187.49	205.06
750,000	43.94	56.50	62.77	75.33	87.88	102.88	123.99	131.83	150.66	169.49	188.32	200.88	219.71
800,000	46.87	60.26	66.96	80.35	93.74	109.73	132.25	140.62	160.70	180.79	200.88	214.27	234.36
900,000	52.73	67.80	75.33	90.40	105.46	123.45	148.79	158.19	180.79	203.39	225.99	241.06	263.65
1,000,000	58.59	75.33	83.70	100.44	117.18	137.17	165.32	175.77	200.88	225.99	251.10	267.84	292.95

## Assessed Valuation, Levy Limit, Tax Levy and Rates: FY2000-2017

Fiscal Year	Total Assessed Value		Levy Ceiling		Levy Limit		Actual Levy		Uniform Tax Rate	Unused Levy Limit	
	Assessed Value		Levy Ceiling		Levy Limit		Within Limit	Debt Exclusion		\$	as % of Limit
2000	\$2,742,122,055	\$68,553,051	\$33,421,403	\$32,453,928	\$725,749	\$12.10	\$967,475	2.89%			
2001	\$2,783,643,972	\$69,591,099	\$34,827,754	\$34,225,525	\$681,370	\$12.54	\$602,229	1.73%			
2002	\$3,974,434,046	\$99,360,851	\$38,958,156	\$38,226,458	\$842,228	\$9.83	\$731,698	1.88%			
2003	\$4,408,301,807	\$110,207,545	\$42,171,555	\$41,782,825	\$713,204	\$9.64	\$388,730	0.92%			
2004	\$4,411,852,520	\$110,296,313	\$45,336,664	\$45,161,214	\$1,560,304	\$10.59	\$175,450	0.39%			
2005	\$5,117,100,515	\$127,927,513	\$48,886,984	\$48,293,261	\$1,854,324	\$9.80	\$593,723	1.21%			
2006	\$5,207,535,371	\$130,188,384	\$51,679,906	\$50,786,544	\$2,486,543	\$10.23	\$893,362	1.73%			
2007	\$5,309,253,831	\$132,731,346	\$54,523,353	\$53,363,359	\$2,702,361	\$10.56	\$1,159,994	2.13%			
2008	\$5,498,736,316	\$137,468,408	\$57,254,951	\$55,919,464	\$3,026,989	\$10.72	\$1,335,487	2.33%			
2009	\$5,264,591,702	\$131,614,793	\$59,634,076	\$58,717,305	\$3,931,336	\$11.90	\$916,771	1.54%			
2010	\$5,026,552,229	\$125,663,806	\$62,197,127	\$61,284,932	\$4,512,636	\$13.09	\$912,195	1.47%			
2011	\$5,045,140,030	\$126,128,501	\$64,569,355	\$62,529,967	\$4,015,430	\$13.19	\$2,039,388	3.16%			
2012	\$5,090,058,629	\$127,251,466	\$67,047,174	\$65,053,133	\$4,069,863	\$13.58	\$1,994,041	2.97%			
2013	\$5,054,970,094	\$126,374,252	\$69,911,104	\$67,034,708	\$4,088,721	\$14.07	\$2,876,396	4.11%			
2014	\$5,130,493,662	\$128,262,342	\$72,879,506	\$69,334,221	\$4,801,422	\$14.45	\$3,545,285	4.86%			
2015	\$5,412,298,562	\$135,307,464	\$75,539,516	\$71,897,151	\$5,444,595	\$14.29	\$3,642,365	4.82%			
2016	\$5,841,889,295	\$146,047,232	\$78,712,008	\$75,508,265	\$5,810,834	\$13.92	\$3,203,743	4.07%			
2017	\$5,973,716,402	\$149,342,910	\$82,116,773	\$77,784,021	\$6,266,168	\$14.07	\$4,332,752	5.28%			

**Budget - All Accounts , FY14 - FY17 and FY18 Adopted Finance Committee Guideline**

Line #		FY14 Budget	FY16 Budget	FY17 Budget	FY18 Budget	FY18 Guideline	Dollar Change	Percent Change	Percent of Total
<b>Town Government</b>									
1	personal services	\$ 14,494,368	\$ 15,181,707	\$ 16,468,178	\$ 17,285,653		\$ 817,475	4.96%	16.97%
2	O & M	3,234,645	3,332,306	3,470,835	3,683,860		212,525	6.12%	3.62%
3	capital outlay	1,520,000	1,625,000	1,709,000	1,870,000		70,000	3.89%	1.84%
4	Reserve Fund	225,000	225,000	225,000	225,000		0	0.00%	0.22%
5	<b>Total General Fund</b>	<b>\$ 19,474,013</b>	<b>\$ 20,364,013</b>	<b>\$ 21,114,013</b>	<b>\$ 23,064,013</b>		<b>\$ 1,100,000</b>	<b>5.01%</b>	
	Emergency Services Stabilization Fund		200,000	50,000	0		<b>(50,000)</b>		
	<b>Total Town Government</b>		<b>\$ 20,564,013</b>	<b>\$ 21,214,013</b>	<b>\$ 23,064,013</b>		<b>\$ 1,050,000</b>	<b>4.95%</b>	<b>22.64%</b>
6	Concord Public Schools	\$ 31,140,538	\$ 32,440,538	\$ 35,660,111	\$ 36,810,111		\$ 1,150,000	3.22%	36.14%
7	Concord-Carlisle RSD	\$ 15,356,221	\$ 15,856,221	\$ 17,035,005	\$ 17,935,005		\$ 900,000	5.26%	17.61%
9	<b>Total Operating Budgets</b>	<b>\$ 65,970,772</b>	<b>\$ 68,660,772</b>	<b>\$ 74,709,129</b>	<b>\$ 77,809,129</b>		<b>\$ 3,100,000</b>	<b>4.15%</b>	<b>76.36%</b>
<b>JOINT TOWN &amp; OPS ACCOUNTS</b>									
9	Group Insurance	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000	\$ 4,650,000		\$ 150,000	3.23%	4.71%
9a	OPEB Trust	650,000	900,000	1,400,000	1,470,000		70,000	5.00%	1.44%
10	Retirement	3,035,000	3,125,000	3,317,000	3,667,000		350,000	10.55%	3.60%
11	Debt Service	3,400,000	3,500,000	3,730,000	3,860,000		130,000	3.49%	3.79%
11a	Refunding savings, required levy		114,217	0	0		0	0.00%	0.00%
11b	Debt Service, CORSD Non-Exempt		685,000	80,753	102,563		21,830	27.03%	0.10%
12	Social Security/Medicare	640,000	740,000	765,000	810,000		45,000	5.88%	0.60%
13	Other Fixed & Mandated	400,000	425,000	450,000	450,000		0	0.00%	0.44%
14	<b>subtotal</b>	<b>\$ 12,775,000</b>	<b>\$ 13,265,000</b>	<b>\$ 14,392,753</b>	<b>\$ 15,159,563</b>		<b>\$ 766,830</b>	<b>5.33%</b>	<b>14.86%</b>
15	Minuteman Voc Tech	\$ 227,033	\$ 191,669	\$ 423,444	\$ 500,000		\$ 76,556	18.08%	0.49%
16	High School Debt Exclusion	1,551,843	1,658,841	3,688,218	3,581,484		<b>(106,734)</b>	<b>-2.91%</b>	<b>3.50%</b>
17	Town Debt Exclusion	4,624,457	4,495,632	4,007,828	3,607,507		<b>(400,321)</b>	<b>-9.99%</b>	<b>3.54%</b>
	<b>subtotal</b>	<b>\$ 6,403,333</b>	<b>\$ 6,546,182</b>	<b>\$ 8,099,490</b>	<b>\$ 7,688,991</b>		<b>\$ (430,499)</b>	<b>-5.32%</b>	<b>7.53%</b>
	Appropriations from Free Cash		625,000	0	0		<b>(625,000)</b>		
18	<b>TOWN MEETING VOTE</b>	<b>\$ 85,149,105</b>	<b>\$ 88,691,934</b>	<b>\$ 97,201,372</b>	<b>\$ 100,637,703</b>		<b>\$ 3,436,331</b>	<b>3.54%</b>	<b>98.79%</b>
19	State assessments	\$ 429,403	\$ 511,364	\$ 495,310	\$ 500,500		\$ 5,190	1.05%	0.49%
20	Snow/ice & other deficits	101,951	285,362	0	178,656		178,656		0.18%
21	Overlay	539,880	555,513	552,900	550,000		<b>(2,900)</b>	<b>-0.52%</b>	<b>0.54%</b>
22	<b>subtotal</b>	<b>\$ 1,071,234</b>	<b>\$ 1,352,239</b>	<b>\$ 1,048,210</b>	<b>\$ 1,229,156</b>		<b>\$ 180,946</b>	<b>17.26%</b>	<b>1.21%</b>
23	<b>TOTAL BUDGET PLAN</b>	<b>\$ 86,220,339</b>	<b>\$ 90,044,193</b>	<b>\$ 98,249,582</b>	<b>\$ 101,866,859</b>		<b>\$ 3,617,277</b>	<b>3.66%</b>	<b>100.00%</b>

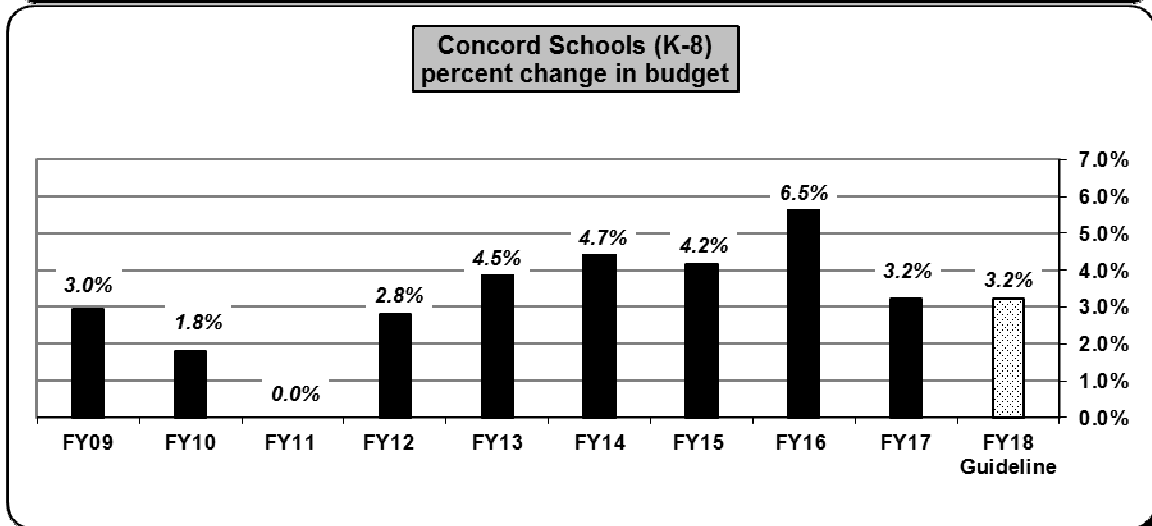
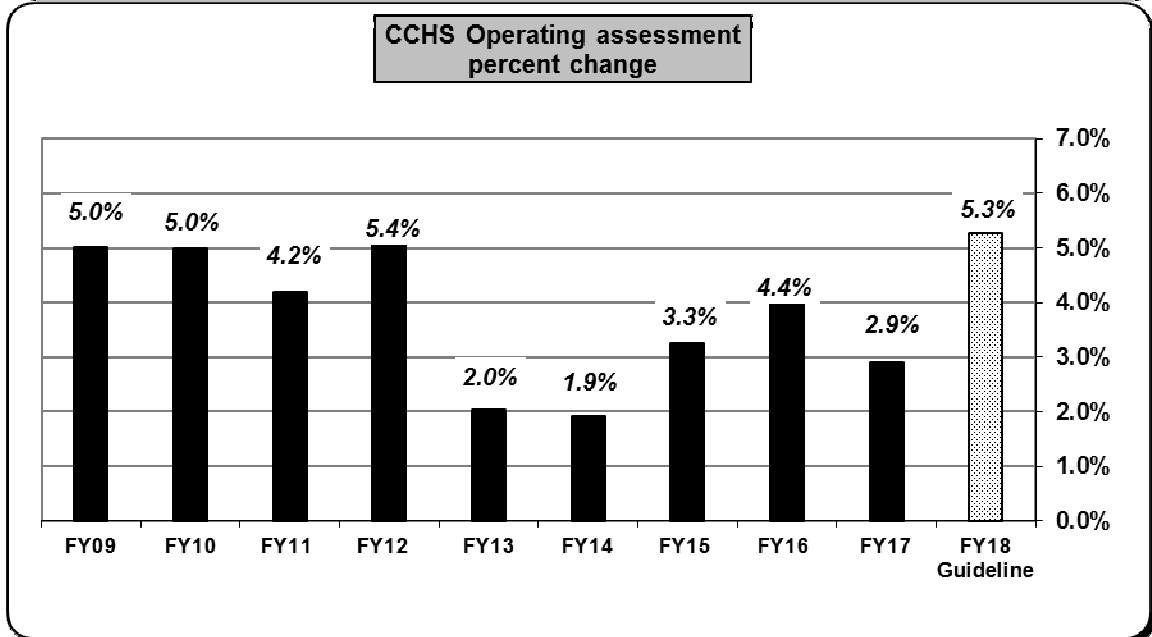
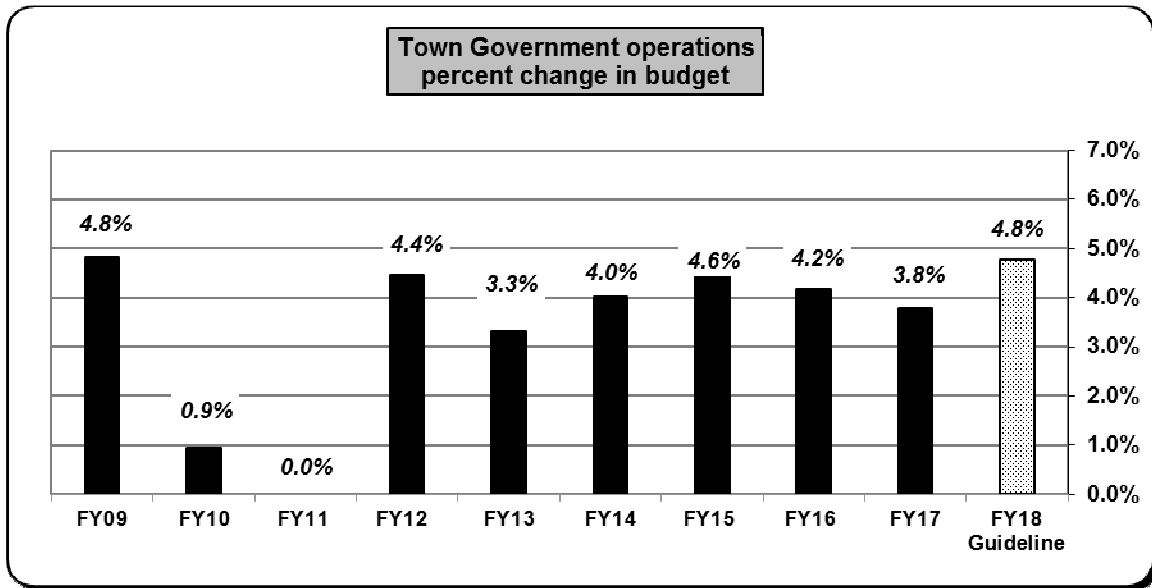
"Concord-Carlisle RSD" is Concord's share of the assessable portion of the High School budget.

"Other Fixed & Mandated" includes: Property & Liability Insurance, Unemployment and Worker's Compensation.

**FY18 Guideline  
Financing the Budget Plan**

Change from FY17 Budget

	FY14 Budget	FY15 Budget	FY16 Budget	FY17 Budget	FY18 Guideline	Dollar Change	Percent Change	Percent of Total	
24	state aid \$ 3,792,628	\$ 4,147,519	\$ 4,272,640	4,642,015	\$ 4,650,000	\$ 7,985	0.17%	4.56%	
25	motor vehicle excise tax 2,400,000	2,600,000	2,850,000	2,875,000	3,042,586	167,586	5.83%	2.99%	
26	investment earnings 125,000	100,000	100,000	150,000	150,000	0	0.00%	0.15%	
27	other local revenue 3,094,400	3,436,400	3,723,200	3,607,000	3,972,000	365,000	10.12%	3.90%	
28	Appropriations financed from:								
29	Elem. Debt Stabilization Fund \$ 735,000	\$ 0	\$ 0	0	\$ 0	\$ 0			
30	OCHS Debt Stabilization Fund 230,000	500,000	1,500,000	1,000,000	785,000	(215,000)	-21.50%	0.77%	
31	Emergency Services Stab. Fund 200,000	200,000	100,000	50,000	0	(50,000)	-100.00%	0.00%	
32	Free Cash 0	625,000	625,000	0	0	0			
33	Transfers to General Fund:								
34	from CMLP (Light Fund) \$ 447,800	\$ 458,650	\$ 472,400	465,500	\$ 474,000	\$ 8,500	1.83%	0.47%	
35	Thoreau School MSBA grant 409,878	409,878	409,878	409,878	0	(409,878)	-100.00%	0.00%	
36	"free cash" transfer 850,000	850,000	950,000	1,000,000	1,000,000	0	0.00%	0.96%	
37	subtotal \$ 12,084,706	\$ 12,702,447	\$ 15,003,118	14,199,393	\$ 14,073,586	\$ (125,807)	-0.89%	13.82%	
<b>Property Tax:</b>									
38	property tax base \$ 68,113,587	\$ 71,061,652	\$ 74,224,261	76,371,162	\$ 80,259,281	\$ 3,888,119	5.09%	78.79%	
39	new growth 1,220,624	835,499	1,284,004	1,412,859	1,150,000	(262,859)	-18.60%	1.13%	
40	total within the Levy Limit \$ 69,334,211	\$ 71,897,151	\$ 75,508,265	77,784,021	\$ 81,409,281	\$ 3,625,260	4.66%	79.92%	
41	debt service excluded from Levy Limit 4,801,422	5,444,595	5,810,834	6,266,168	6,383,992	117,824	1.88%	6.27%	
42	total property tax \$ 74,135,633	\$ 77,341,746	\$ 81,319,099	84,050,189	\$ 87,793,273	\$ 3,743,084	4.45%	86.16%	
<b>TOTAL RESOURCES</b>						\$ 3,617,277	3.68%	100.00%	



## Five Year Projection of Real Estate Taxes

Article 3, adopted at the Special Town Meeting on November 7, 2011, requested the Finance Committee to develop a five-year projection of the real estate taxes likely to be levied on the citizens of the Town. This report, the sixth year this projection has been developed, covers the period FY19 through FY23. In response to citizen comments and suggestions, the Finance Committee has continued to refine the five-year projection of real estate taxes to present multiple scenarios, the first being based on a “most likely” analysis and then two alternatives scenarios.

The level of the operating budgets of the Town government and the schools are the dominant contributors to the amount of taxes that must be levied since they comprise approximately 76% of the total Town Budget. The Town and School administrations have informed the Committee that annual increases between 3% and 5% are necessary to maintain the current level of services. Keeping budgets below the lower end of this range for an extended period of time is likely to require cuts in services, staff reductions, deferral of maintenance and/or delays in equipment replacement to balance resource availability with expenditures.

The projections by the Finance Committee are based on a number of significant assumptions. With approximately 86% of General Fund revenue derived from property taxes, the Town budget is more sensitive to changes in spending levels than it is to changes in external sources of revenue. All three scenarios are based on a moderate economic environment. State Aid, which represents about 4.5% of General Fund resources, is conservatively estimated to increase 2.5% annually (in the most likely scenario). Moderate revenue increases were included in categories where growth is reasonably expected, including contributions from local excise taxes, licenses & permits, and property taxes from new construction and renovations. Contributions from Free Cash were estimated at 1% of the Total Projected Budget, consistent with funding policies established since 2012.

The three five-year scenarios reflect varying sets of expenditure assumptions and only minor differences in revenue expectations. Each of the scenarios incorporates projected expenditures for individual town budget line items including Operating budgets for the Town, Concord Public Schools (CPS), Concord-Carlisle Regional School District (CCRSD), and expenses for Group Insurance, Retirement, Other Post-Employment Benefits (OPEB), Minutemen Vocational Technical School and Town debt repayments. The Operating budget for CCRSD incorporates planned OPEB contributions as well as changes in the proportion of Concord’s share of the CCRSD budget and school building excluded debt expense, resulting from anticipated shifts in Concord and Carlisle projected student enrollment. The Most Likely Scenario represents a period of modest expenditure growth (cost increases generally of about 3-4%). Alternative Scenario 1 represents a period of below average expenditure growth (at or slightly lower than the 10 year average annual increase), and Alternative Scenario 2 represents a period of above average expenditure growth (4-5% or greater). All three scenarios represent reasonable expenditure levels that may be anticipated, ranging from weak economic conditions to a high level of local development activity driving increases in Town services and student populations. Although the three scenarios are designed to represent a realistic range of outcomes, the Town’s actual experience may fall outside the scope of the scenarios.

The Finance Committee believes it is important to incorporate only future expenses which have been formally planned and have defined expense projections. The projections do not include allowances for other potential or

unanticipated projects, and therefore this model may underestimate future debt expense. Net debt expense peaked in FY17 at 10.3% of Total Budget and is projected to decline under the most likely scenario, to 8.7% in FY23.

Across all three scenarios, the largest annual increase in property taxes to existing taxpayers is expected in FY19, followed by a decline in FY20. During this time, increases in Operating Budget expenses are offset by larger declines in excluded debt expenses from Town Meeting approved projects. Other factors impacting the FY19-FY23 projection of tax increases include shifts in Concord’s projected share of CCRSD students, which drives the Town’s portion of the CCRSD Operating budget and excluded debt. The ratio is expected to increase to 75.4% by 2023, with a notable one year decline in 2020. In the Most Likely Scenario, the moderate spending environment, property taxes to existing taxpayers increase between 2.3% and 3.5% per year. In Alternate Scenario 1, the annual increase ranges from 1.9% to 3.1%, and in Alternate Scenario 2, from 2.8% to 4.0% (See Figure 1).

Figure 2 indicates that under all three scenarios, the Town of Concord maintains unused Proposition 2 ½ levy capacity through FY22. However, under Alternate Scenario 2 with the higher than average spending environment, the levy limit is exceeded starting in FY23. If the limit is exceeded, two sets of approvals will be required. The Town has approved operating budget overrides of levy limits in prior years, most recently in FY07.

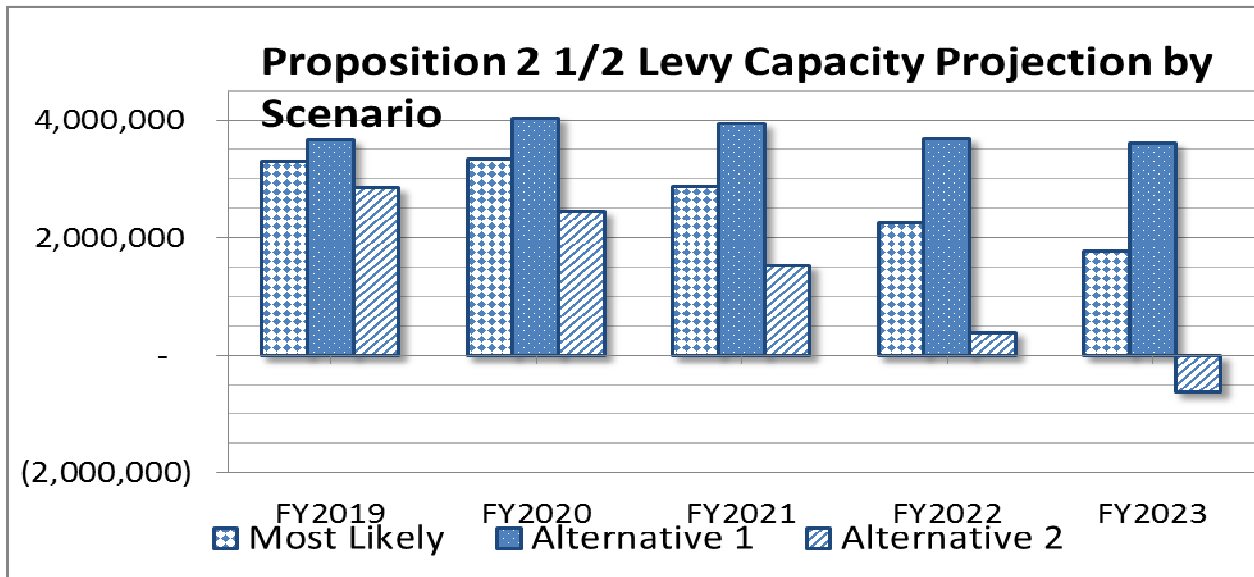
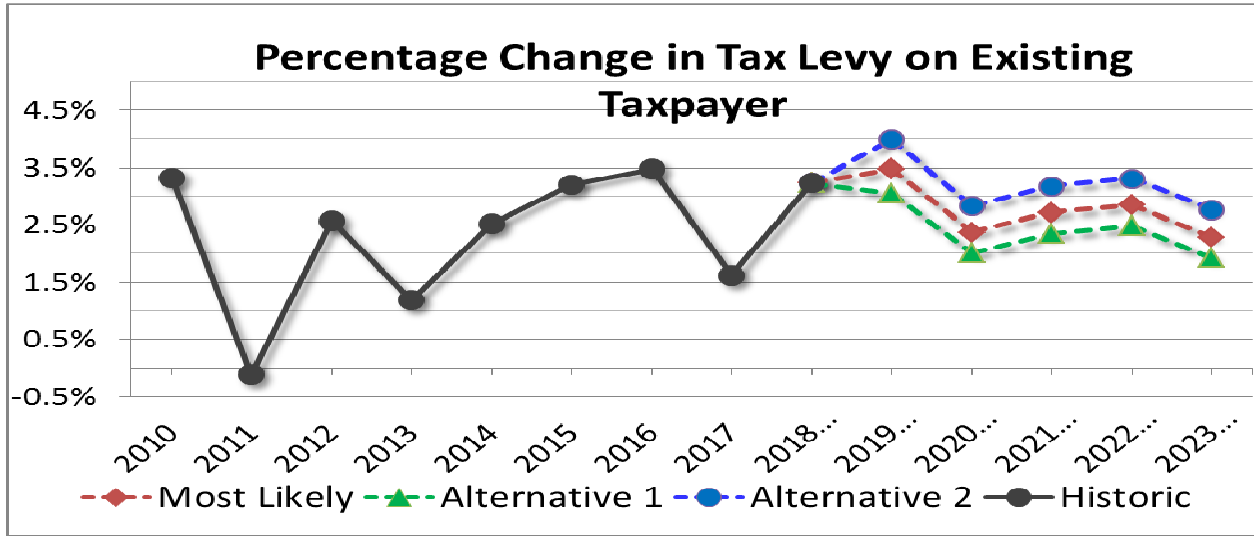
A tax bill calculator is included in Table 1 to allow individual taxpayers to calculate the impact of the projected Most Likely Scenario tax increase on their property tax bills, based on present assessed values. Lastly, the Finance Committee reminds citizens that this model represents our best projection of operating needs and resources. Changes in future economic conditions and Town Meeting warrant article approvals will impact actual real estate tax increases. The Finance Committee will continue its efforts to improve the usefulness of its five-year projection for taxpayers, town and school administrators, boards, and committees. We welcome your comments and suggestions to improve the five-year projection and its presentation to citizens.

A copy of this report will be available on the Finance Committee website along with the assumptions for all three scenarios and additional charts and tables.

**Table 1: Tax Impact Calculator**

Home Value	2017	(B)2018	Est 2019	Est 2020	Est 2021	Est 2022	Est 2023
Concord FY17 Median (\$819,400)	11,529	11,902	12,316	12,609	12,951	13,319	13,623
- per 100K	1,407	1,453	1,503	1,539	1,581	1,625	1,663
\$250,000	3,518	3,631	3,758	3,847	3,951	4,064	4,156
\$500,000	7,035	7,263	7,515	7,694	7,903	8,127	8,313
\$750,000	10,553	10,894	11,273	11,541	11,854	12,191	12,469
\$1,000,000	14,070	14,525	15,031	15,388	15,805	16,254	16,625
\$1,500,000	21,105	21,788	22,546	23,081	23,708	24,381	24,938
\$2,000,000	28,140	29,051	30,062	30,775	31,610	32,508	33,251

*Note: The median single family residential tax bill in FY18 is \$11,902, based on an assessed value of \$819,400 at a tax rate of \$14.07 per thousand. Estimates assume no change in property values over FY17.*



## Budget Summary: Article 7 – General Fund Appropriation

### Town Government Departments and Joint Town-Concord Public Schools (CPS) Accounts

Article 7 consists of thirty-four separate appropriation accounts. Once voted, funds cannot be transferred between these accounts except by Town Meeting action. For Guideline purposes, these accounts are grouped into two categories:

Article 7 - The Proposed Town Government General Fund Budget				
for the year beginning July 1, 2017				
General Fund appropriations				
		Appropriations	Proposed	percent
		FY 2017	FY 2018	change
<b>Operations (accounts 1-34)</b>				
	General Government	\$2,895,694	\$2,885,019	-0.4%
	Finance & Admin & IT	2,333,799	2,453,175	5.1%
	Police & Fire	9,253,145	9,307,693	0.6%
	Public Works	4,203,351	4,265,349	1.5%
	Library	2,136,945	2,142,218	0.2%
	Reserve Fund	225,000	225,000	0.0%
	Salary Reserve	28,065 *	793,923	
	Recreation & all other	888,015	991,637	11.7%
	<b>TOTAL subject to Guideline</b>	<b>\$21,964,014</b>	<b>\$23,064,014</b>	<b>5.0%</b>
<b>Town and School debt service (account #35):</b>				
	repayment within levy limit	3,730,000	3,860,000	3.5%
	excluded from levy limit	3,007,828	2,822,507	-6.2%
	<b>TOTAL</b>	<b>\$6,737,828</b>	<b>\$6,682,507</b>	<b>-0.8%</b>
<b>Employee Benefits (Town and CPS):</b>				
	Group Insurance (acct. #31A)	4,650,000	4,800,000	3.2%
	OPEB Trust Fund (acct. #31B)	1,400,000	1,470,000	5.0%
	Retirement (pension funding, acct. #33)	3,317,000	3,667,000	10.6%
	Medicare/social security (acct. #34)	765,000	810,000	5.9%
	<b>TOTAL</b>	<b>\$10,132,000</b>	<b>\$10,747,000</b>	<b>6.1%</b>
<b>Other Expenses (Town/CPS joint accounts)</b>				
	Workers & Unempl. Comp (acct. #32)	200,000	200,000	0.0%
	Property & Liability Insr. (acct. #31C)	250,000	250,000	0.0%
	<b>TOTAL, Article 7</b>	<b>\$39,283,842</b>	<b>\$40,943,521</b>	<b>4.2%</b>
* NOTE: balance of FY17 salary reserve at 3-31-17 not yet transferred to operating accounts				

- the Town Operating Budget, Items 1-34 is recommended at \$23,064,013 for FY2018, which is an increase of \$1,050,000 or 4.8% from the current year General Fund budget and is at the Finance Committee's Guideline;
- the Joint Town-CPS accounts, Items 35-39, are recommended at \$17,879,507. This is 3.2% above the current budget, reflecting an increase in funding for Group Insurance, OPEB, Social Security, and Medicare.

The Joint Town-CPS group of accounts includes employee group insurance, the Other Post-Employment Benefits (OPEB) Trust Fund (which is proposed to be increased \$70,000 in line with the Town's long-term funding plan for retiree health insurance benefits), the Town's annual required payment to the employee (non-teacher) pension fund, property and liability insurance covering the Town and CPS, and the debt service account covering debt issued for both the Town and CPS capital projects, both debt service within the levy limit and debt service on bonds voted by the town electorate to be paid from tax levies above the levy limit. Effective management of these accounts is strengthened by consolidating the Town government and Concord Public Schools components rather than dividing these accounts between Town and School appropriations.

Item 39, Debt Service, includes \$2,822,507 for principal and interest expense excluded from the levy limit by past votes of the electorate (refer to the section in this Report on excluded debt). This is the net amount to be tax-supported after the proposed allocation of \$785,000 from Debt Stabilization funding.

Without the offset of the Stabilization Fund used in both FY17 and FY18, the total increase in the Article 7 proposed Town Government spending plan is 3.6%.

## **Town Government: Items 1-34**

The proposed General Fund operating budget for the departments organized under the Town Manager is \$23,064,013. As shown in the accompanying table, it is broken down into two main components: operations, up 5.2%; and capital outlay, up 3.9%.

### **Article 7 Overview**

Article 7 shows only the General Fund portion of each budget account, as this is the portion to be voted by the Town Meeting. Many budget accounts include resources from other funds, typically involving allocations from the Town's enterprise operations (Water, Sewer, Light, Solid Waste, and Swim & Fitness Center) for management services provided.

The Town Manager's Proposed Budget document, published on February 16th and available on the Town website at [concordma.gov](http://concordma.gov), provides detailed discussion of each account. The Finance Committee has reviewed this document with the Town Manager and has conducted a Public Hearing (February 27<sup>th</sup>) on the submitted plan. The Finance Committee recommends the adoption of the Town Government budget as proposed by the Town Manager.

Highlights of the Proposed Budget are summarized as follows.

- Increased funding for Resource Sustainability and Facilities Management to improve energy efficiency and upkeep associated with municipal buildings.
- Funding is provided in the Department of Planning and Land Management for Cross-Town Connect to provide another option in local transit.
- Additional funding for technology related efforts including the Human Resource Information System, and eTime & Attendance software.
- An increase in funding for Veteran's benefits.
- The Guideline provides additional funding for the Town's management of the Visitors Center.
- Most of the additional funding provided by the Finance Committee Guideline is being directed to salary adjustments for non-union staff and for collective bargaining agreements with unionized staff, with the objective of recruiting and retaining a high quality staff;
- Net new staffing supported from the General Fund in the proposed budget total 0.44 FTE positions. Among the significant additions are an additional Fire Lieutenant to help with fire inspections and fire prevention, additional hours for Human Services employees including Outreach Workers, Van Drivers, and a Geriatric Nurse, and finally additional hours for Library staff for expanded hours on weekends.

## **Budget Changes**

The significant changes and other selected account recommendations contained in the proposed FY18 budget are as follows:

## **Account Number - Account Title**

### **1A Town Manager**

The Town Manager's operating appropriation represents a 1.9% decrease from FY17. The Town Manager's Office is staffed by the Town Manager, Assistant Town Manager, Public Information Officer, Executive Assistant to the Town Manager and an Administrative Assistant. There is a proposed addition of funding for Sister Cities (\$1,000), Concord Cultural Council (\$2,000) and the management of White Pond (\$20,000).

### **1B Human Resources**

The Human Resources operating appropriation is proposed to increase by 5.3% in FY18 due to a staffing restructuring of an HRIS Analyst and additional OT needed to complete the Human Resources Information Systems project.

### **1C Facilities Management**

This account was established with the FY05 budget in an effort to set up a central pool of funds from which to monitor building conditions, establish renovation priorities, and fund repairs and improvements. Since FY05 when the account was first budgeted at \$40,000, the funding level has gradually been increased to the recommended level in FY18 of \$290,000. The five-year Capital Outlay plan raises this funding target to \$360,000 by FY22. The account funds a Facilities Manager and Facilities Maintenance Supervisor to oversee the maintenance of municipal buildings.

### **1D Resource Sustainability Fund**

With this new account initiated in FY13 with funding of \$25,000, an amount of \$126,000 is proposed to be allocated in FY18 for resource sustainability and energy conservation projects. The additional funds will cover part of the salary for the Energy Conservation Coordinator.

### **1E Visitors Center**

The FY18 operating appropriation for the Visitors Center is proposed to increase by 35% primarily because the Town has taken over responsibilities of operating the center.

### **1F 37 Knox Trail**

The FY18 appropriation for the 37 Knox Trail office building is \$17,762 and is proposed to cover the utility and capital costs associated with the building. This building is currently shared between the Regional Housing Services Office (RHSO) and School Transportation Department.

### **3A Elections**

The amount required to fund the elections account is dependent on the number of federal, state, and local elections that are held in a given year. In FY18, it is expected that there will be one election. Each election costs the Town approximately \$14,000.

### **3B Registrars**

There is a slight increase proposed in this account for additional staff hours. This account provides resources to register voters, conduct the Annual Town Census, and certify nomination papers and petitions.

### **5A Planning Division, Department of Planning and Land Management (DPLM)**

Since the FY14 budget presentation, the Zoning Board of Appeals budget has been incorporated into the Planning Division budget. In addition, the Planning budget contains funding for the Historic Districts

Commission and the Historical Commission. The FY18 operating appropriation for the Planning Division is proposed to increase by 3.2%. Funding for Cross-Town Connect (\$7,500) and the RHSO (\$18,000) are included in this budget.

**5B Natural Resources Division, DPLM**

The proposed Natural Resources budget represents approximately a 3.2% increase in the appropriation from that of the FY16 budget. In addition to \$5,000 proposed for pond & stream management, \$10,000 is proposed for updating and printing trail map guides.

**5C Building Inspections Division, DPLM**

Most of the allocation in this account goes toward funding the Building Inspections staff, which includes the full-time positions of Building Commissioner, Local Inspectors (2.60 FTEs), and Administrative Assistant. Due to demand for services and associated staffing needs, the operating appropriation is proposed to increase 3.0%.

**5D Health Division, DPLM**

This appropriation represents a 2.7% increase in the operating appropriation from that of FY17. As was the case last year, an amount of \$20,000 is recommended to fund the East Middlesex Mosquito Control Project for efforts to protect Concord residents and visitors from Eastern Equine Encephalitis and West Nile Virus. In addition, \$15,600 is proposed for the funding of the Public Health Nurse which is a shared position with the Council on Aging (COA).

**6 141 Keyes Road, DPLM**

The FY18 proposed operating appropriation represents a 0.6% decrease from FY17 to provide funding for utility, maintenance, and custodial costs for the Victorian-era brick building at 141 Keyes Road.

**8A Finance Administration Division, Finance Department**

The Finance Administration Division operating appropriation is proposed to decrease by 4.3% from that of FY17, due to personnel savings. The budget will provide funding for the Finance Director, Budget and Purchasing Manager, Assistant Treasurer, Sr. Budget & Operations Analyst, and Finance Assistant.

**8B Treasurer-Collector, Finance Department**

The Treasurer-Collector operating appropriation is proposed to increase by 0.8% in FY18. This account includes funding for much of the Town's postage expenses (\$56,650) and banking service charges (\$86,000). The increase in this budget is primarily a result of printing and legal services.

**8C Town Accountant, Finance Department**

The FY18 operating appropriation is proposed to increase by 1.1% with increases in staff training and development. The proposed budget also includes \$66,000 to cover the cost of the Town's annual external audit.

**8D Assessing Division, Finance Department**

The Assessing proposed operating appropriation represents a 0.3% decrease from FY17. The Assessing Division is located at the Town-owned 24 Court Lane building, adjacent to the Sleepy Hollow Cemetery.

**8E Town Clerk, Finance Department**

The Town Clerk operating appropriation is proposed to increase by 0.5% from FY17. This budget provides funding for the Town Clerk, Assistant Town Clerk and Senior Department Clerk positions.

## **9 Information Systems**

The Information Systems operating appropriation is proposed to increase by 17.1% in FY18. This increase is mainly due to additional system maintenance and upgrade costs, including scheduled replacement of servers. The contract for Help Desk support was re-bid in FY17. The new contract has both a higher level of service and increased costs scheduled to hit beginning in FY18.

## **10 Town House**

The FY18 proposed appropriation is increased by 1.5% from that of FY17. This budget include costs for maintaining and cleaning the Town House and the Assessing Division office space at 24 Court Lane.

## **11 Police Department**

The FY18 operating appropriation proposes a 0.5% increase. This budget provides for about \$25,000 in additional overtime.

## **12 Fire Department**

There is a proposed 2.6% increase in the Fire Department's FY18 operating appropriation. This budget provides for an additional Fire Lieutenant who will focus on inspections and fire prevention. This budget also allows for additional overtime for EMS training.

## **13 West Concord Fire Station**

This budget funds the operations of the West Concord Fire Station located at 1201 Main Street. This account has a proposed 2.1% decrease in the operating appropriation for FY18.

## **14 Police/Fire Station**

This budget funds the operations of the Police and Fire Department headquarters at 209 Walden Street. The FY18 budget proposes a 3.8% increase in the operating appropriation. A majority of the additional funding will go toward the annual maintenance contract for the Dispatch communication system.

## **15 Emergency Management**

There is a proposed 12.3% increase in the operating appropriation for FY18 mainly due to the need for consulting services in emergency planning to aid in the build out of shelter capacity at the Harvey Wheeler Community Center and to pay fuel and maintenance costs for the newly installed emergency generator.

## **17A Public Works Administration, Concord Public Works (CPW)**

The FY18 operating appropriation reflects a 0.3% decrease from that of FY17. Public Works Administration includes the CPW Director, Management Analyst, Administrative and Special Projects Coordinator, and an Administrative Assistant.

## **17B Engineering, CPW**

The Engineering Division's operating appropriation is proposed to have a 0.4% decrease from FY17 to FY18. The Engineering Division has a Town Engineer, Assistant Town Engineer, 3 Assistant Public Works Engineers, GIS/IT Program Analyst, and an Administrative Assistant.

## **17C Highway Maintenance, CPW**

The operating appropriation is proposed to increase by 2.0% from FY17. This account includes catch-basin cleaning (\$18,000), infrared patching of street openings (\$18,000), and crack sealing (\$2,000).

**17D Parks & Trees, CPW**

The FY18 Parks & Trees operating appropriation is proposed to have a 1.9% increase from FY17. Funding of \$12,800 is proposed for tree removal services.

**17E Cemetery, CPW**

The Cemetery Fund supports the Cemetery Division by providing resources for 65% of all operating expenditures and 100% of all capital improvements. The FY18 operating appropriation has no significant changes from FY17.

**18 Snow Removal, CPW**

The snow removal budget is proposed to be funded at \$610,000, an increase of \$12,500 from that of FY17. The amount budgeted for road salt is funded at \$225,396. If the actual FY17 expenditure exceeds the budgeted amount, the Town is allowed by State statute to add the difference to the following year's tax levy. The FY18 budget plan provides room for an \$180,321 overrun of the \$597,500 FY17 appropriation.

**20 Public Works Equipment, CPW**

The Public Works Equipment budget of \$325,000 funds the Town's well-planned schedule of equipment replacement. This represents an increase of \$25,000 from FY17.

**22 Sidewalk Management, CPW**

The proposed FY18 budget calls for an increase of \$10,000 for maintenance of the Town's existing sidewalks program to \$110,000.

**23 Road Improvements, CPW**

The General Fund proposed funding for road improvements is \$100,000. With additional amounts of \$671,400 expected from the State (Chapter 90 Funds) and \$1,415,000 in borrowing, the total FY18 amount for road improvements is recommended to be \$2,186,400.

**24 133 and 135 Keyes Road, CPW**

For FY18, there is a proposed decrease of 11.5% in the operating appropriation due to contracting out for custodial services.

**25 Library**

As set forth in a long-standing agreement, the Trustees of the Concord Free Public Library Corporation, which owns the Main library and the Fowler Branch, are responsible for maintenance and capital improvements of the buildings and grounds; the Town covers the operating costs. For FY18 operations, the Library operating appropriation is proposed to have an increase of 0.3% from FY17 to FY18. The proposed budget allows for funding of the Sr. Administrative Assistant, and \$6,500 for weekend staffing.

**26A Human Services**

Human Services covers the staffing costs for the Community Services Coordinator, and the Youth Services Coordinator. The FY18 budget of \$88,706 covers those salaries as well as office supplies. The General Fund contribution to the salary of the Community Services is proposed to increase from \$15,464 to \$34,887 in FY18.

**26B Senior Services**

The FY18 operating appropriation for Senior Services is proposed to increase by 8.2%. The increase is due to increases in hours for the Wellness Coordinator (Nurse), Van Drivers, and Social Service Coordinator.

### **26C Recreation Services**

The FY18 operating appropriation for Recreation Services is proposed to increase by 1.6%, and provides General Fund support for the Recreation Director's salary.

### **27 Harvey Wheeler Community Center**

The Harvey Wheeler Community Center continues to be a great resource for the Town in providing space for the Council on Aging office and Recreation Department programs, as well as a meeting area for Town departments, not-for-profit groups, and private individuals. For FY18 there is a proposed 0.1% increase in the operating appropriation.

### **28 Hunt Recreation Center**

It is proposed that the FY18 operating appropriation for the Hunt Recreation Center is an overall slight decrease over FY17. There is a significant decrease in Purchased Services, generally offset by increases in utility and building improvement costs at 105 Everett Street and maintenance and upkeep costs for the restroom facilities at Rideout Playground.

### **29 Veterans Services**

The FY18 proposed operating appropriation represents a 79% increase from that of FY17. This increase is a result of the predicted rise in veterans' benefits costs from \$45,000 to \$95,000 to accommodate additional beneficiaries as well as additional hours for the Veterans' Services Agent.

### **30 Ceremonies and Celebrations**

The FY18 proposed operating appropriation represents a 21.1% decrease from FY17 due to reduced hours for Police overtime.

### **31 Town Employee Benefits**

The proposed budget provides a total of \$100,000, with \$90,000 to cover unused sick leave buyback for some employees at retirement. This payment is restricted to non-union employees hired prior to July 1, 1992 and to uniformed Police and Fire personnel subject to the collective bargaining agreements. In all eligible cases, the benefit is capped at 62 days (65 for firefighters). This account also funds the Employee Assistance Program and certain medical costs for police and fire retirees for accidental disability expenses.

### **32 Reserve Fund**

As budgets remain tight due to the economic situation and there are fewer resources available to cover unexpected events, the Reserve Fund appropriation becomes a crucial part of the budgeting process. By statute, this fund is to be used to meet "extraordinary or unforeseen expenditures" as approved by the Finance Committee. A funding level of \$225,000 is proposed for this purpose, unchanged from FY17.

### **33 Salary Reserve**

The allocation in this account makes resources available for the funding of collective bargaining agreements. In addition, the account provides for a market adjustment to the pay scales and a step and merit adjustment to the salary schedules applicable to non-union employees effective July 1, 2017. Transfers from this account to the individual departmental operating accounts are reported to the Finance Committee and Select Board in accordance with the vote of Town Meeting adopting the budget article. This account is proposed to be funded at \$793,923 in order also to provide resources for such compensation adjustments for union and non-union staff.

### **35A Group Insurance**

The budget anticipates a \$150,000 increase in the appropriation required for FY18 group insurance costs supported by the General Fund. As part of the 17-member Minuteman Nashoba Health Group, the Town is self-insured for employee health coverage and the cost directly reflects actual claims experience.

### **35B Other Post-Employment Benefits (OPEB)**

With the FY13 budget, Other Post-Employment Benefits (OPEB) has been separated into its own line item due to the increasing importance of recognizing and funding this liability. The OPEB liability primarily consists of the present value of the Town's portion of future retiree health care cost. That is, in addition to the amount allocated to pay for the current health care cost of retirees, there is also a liability for the future health care cost for Town Government and Concord Public School retirees. This liability is referred to as the Town Government's Annual Net OPEB Obligation (NOO).

In FY18, the General Fund share of the NOO is projected to be about \$1.65 million. In an effort to fund this liability and continue the effort to catch up on past unfunded liability, it is proposed that the Town budget \$1,470,000 for this purpose, an increase of \$70,000.

### **35C Property & Liability Insurance**

This account funds property insurance coverage for all Town-owned buildings and contents, vehicles, boilers and machinery; liability coverage for Town officials; and special risk coverage for police and fire personnel. Insurance policies cover the Concord Public Schools, the Concord-Carlisle Regional High School, 51 Walden Street (Friends of the Performing Arts in Concord - "FOPAC"), the Emerson Building ("Emerson Umbrella"), and all properties of Town departments including assets of the Town enterprises (Light, Water, Sewer, and Beede Pool). For FY18, General Fund support is level funded at \$250,000.

### **36 Unemployment & Workers Compensation**

An amount of \$100,000 is proposed for the Unemployment Compensation account. The Town pays only for actual claimants, not as a percent of payroll (since the minimum available "experience rating" percentage would be in excess of our actual historical costs). In addition, an amount of \$100,000 is proposed for Worker's Compensation costs; this amount funds a stop-loss reinsurance policy covering wage and other claims and the payment of miscellaneous medical expenses resulting from employee injury on the job. Coverage of unemployment and workers compensation applies to both Town and Concord Public School employees.

### **37 Retirement**

Following the sharp economic downturn in the financial markets during the fall of 2008, assets of the Concord Retirement System have recovered to their previous peak reached in October 2007. At the most recent biennial actuarial valuation as of January 1, 2016, the revised Funding Schedule has been maintained to reach full funding status by the year 2030.

In FY18, the General Fund appropriation is projected at \$3,667,000, an increase of 10.6% from FY17 and consistent with the funding schedule. The retirement system is a "Defined Benefit" plan that provides a pension benefit based upon the highest three-year average annual covered pay and years of service (highest five years for members hired on and after April 2, 2012).

### **38 Social Security & Medicare**

The General Fund cost for the Town's share of Medicare coverage is increased 1.5%, to \$776,200, reflecting both a higher payroll tax base and a higher proportion of covered payroll as employees of the Town and CPS

hired prior to April 1986 retire or leave Town service. Social Security coverage applies to those Town and School employees not members of the Town's retirement system. The projected cost is \$192,250.

### **39 Debt Service**

This item includes the appropriation for Town and CPS debt service within the levy limit and outside the levy limit (excluded debt). Most of the excluded debt is to cover the cost of construction of the three new elementary schools. For debt service, the FY18 budget proposes allocating \$6,682,507, which includes \$3,860,000 for debt service within the levy limit and \$2,822,507 for excluded debt. The excluded debt is net of the amount proposed to be contributed by the Stabilization Funds. The excluded debt to pay for the construction of the new high school is budgeted as part of the assessment from the Concord-Carlisle Regional School District.

## **Budget Summary: Education**

Budgets proposed for the Concord Public Schools (CPS, grades K-8) and the Concord-Carlisle Regional School District (CCRS) for FY18 are presented on page 35. Neither the CPS budget nor the CCRSD budget as currently set forth in the warrant for the spring 2017 Annual Town Meeting is consistent with the Operating Budget Guidelines agreed on and recommended by the Finance Committee on November 30, 2016. However, as explained below, at least in the case of the CCRSD budget the Regional School Committee has voted to match the Guideline and it is anticipated that this will be the motion brought before Town Meeting.

Concord Public Schools (CPS) and Concord-Carlisle High School (CCRS): Budget requests at both CPS and CCRSD represent percentage increases that are above last year's requested increases. Education costs at both CPS and CCRSD and the funding of the long-term liability for Other Post-Employment Benefits (OPEB) at CCRSD remains a significant component of the FY 2018 budget.

### **Concord Public Schools (CPS)**

The FY18 CPS total budget (**Article 13**) adopted by the School Committee at their December 20, 2016 meeting requests \$37,046,694 for net operating expenses representing an increase of 3.89% or \$1,385,583 above the current FY17 budget, as opposed to last year's moderate increase of 3.23%, and exceeding the Finance Committee Guideline of \$36,810,111 by \$236,584. The CPS five-year average increase is 4.61% compared with the average increase of the overall Town and Schools operating budget covered by guidelines of 4.02%.

The majority (80%) of expenses in the CPS budget are allocated to staff salary expense of which a significant portion is driven by collective bargaining agreements. Contractual salary obligations to teachers alone, based on the new contract executed in late FY16, require greater incremental funding this year equal to \$983,347 or a 2.8% increase, but larger increases are expected in subsequent years' budgets. Additional increases in expenses derive from several sources. These include overall administrative costs, which are up 5.33%, including the cost of principals and a proposed new administrative assistant. Of this category of costs, central administration costs increased 8.68%. Significant increases in Special Education costs at the Concord Integrated Pre-school have been observed in recent years and now these will be absorbed into the budget (see discussion under the FY17 Supplemental Appropriation (**Article 14**) below). The Foreign Language initiative is a new program with a budget of \$236,584. Absorbing both the additional program plus the increased Integrated Pre-school costs into the CPS budget in the upcoming fiscal year contributes to a budget that exceeds the Finance Committee guideline. The Finance Committee sets its Guidelines with attention to the cumulative impact of operating

budget increases in setting subsequent years' baselines and the related rise in property tax assessments on Concord taxpayers.

Student enrollment is projected to be relatively stable through SY2026. This year the K - 8 population declined slightly to 2,088.

K - 8 Special Education costs are up slightly from FY17, but less than FY16. Provision of Special education services for students attending Concord schools and Concord students with out-of-district placements are statutorily mandated. Increased use of the Concord Area Special Education (CASE) program versus Special Education contracted services reduced the need for out-of-district placements, which are particularly costly. In general, Special Education costs that exceed certain thresholds for a particular fiscal year receive some reimbursement on a rolling basis in the following fiscal year from State Circuit Breaker aid. While the reimbursement percentage has varied greatly in the past, FY18 aid levels are expected to meet the targeted statutory goal of 75% of the costs exceeding the benchmark threshold. The cost of special education is difficult to predict and can vary widely depending upon the needs of students, especially those who are medically fragile. Costs for special education remain volatile, particularly when new previously unidentified cases move into the community. In addition, costs can migrate from the CPS budget to the CCRSD budget as students progress through their school careers.

Off-setting reductions in the CPS budget include anticipated transportation cost savings with the completion of the new Transportation Facility before the next school year starts, decreasing the salary contingency account, and savings in building maintenance, utilities and heating. Supplies and materials are generally level funded this year.

In the case of the CPS budget, costs for debt service, OPEB (Other Post-Employment Benefits), pensions, group insurance, and Medicare premiums are part of the Town budget and are outside of operating budget considered by the Guideline process.

In addition to the operating budget appropriation, this year the Concord School Committee is requesting a Supplemental Appropriation (Article 14) to cover shortfalls in last year's FY2017 CPS appropriation due to unforeseen increased expenses. These expenses include repair of damages not covered by insurance from the tornado of August 2016, an unexpected spike in paid maternity and medical leaves, and a \$389,000 shortfall due to steadily increasing demand for Special Education support at the Concord Integrated Pre-school. As of the publication of the Town Meeting Warrant, the amount requested for the Supplemental Appropriation is \$400,000 to be disbursed through the Town's Reserve Fund. It is hoped that this amount may be reduced by the time the article is moved at Town Meeting.

The capital budget for Concord Public School Renovations (Article 15) requests \$850,000 funded by debt within the levy limit as part of the Town Manager's Five Year Capital Plan. Projects include the CPS STEAM (science, technology, engineering, art, and mathematics) Innovation Lab at the Ripley building, proposed as a dedicated room in which a collection of materials and resources can be utilized for activities such as prototyping product designs with 3D printers, programming robots, or designing solutions to grade level appropriate engineering challenges that are tied to science curriculum as well as certain art projects. The Elementary Science Curriculum Specialist will staff the lab and co-facilitate activities alongside the visiting classroom teacher. Other projects this year include sidewalk replacement at the Thoreau School, irrigation at the Willard School fields, interior finishes and mechanical work at the Alcott School, and work at the Integrated Pre-School playground.

<b>Proposed FY18 Education Budgets</b>					
				<i>FY17 to FY18 at School Committee proposed</i>	
<b>Concord Public Schools</b>	Adopted	Proposed FY18 Budget		<b>\$ Change</b>	<b>% Change</b>
	FY17 Budget	School Committee	Finance Committee		
<b>Program Area</b>					
Regular Education	\$ 20,411,283	\$ 21,428,111		\$ 1,016,828	4.98%
Special Education	8,029,614	8,024,638	<b>Difference: \$236,584</b>	(4,976)	-0.06%
Administrative Support	2,324,741	2,458,746		134,005	5.76%
Operations	4,832,985	5,071,742		238,757	4.94%
Fixed Costs	61,488	63,456		1,968	3.20%
<b>Total</b>	<b>\$ 35,660,111</b>	<b>\$ 37,046,694</b>	<b>\$ 36,810,111</b>	<b>\$ 1,386,583</b>	<b>3.89%</b>
<b>Concord-Carlisle High School</b>					
	Adopted	Proposed FY18 Budget		<b>\$ Change</b>	<b>% Change</b>
	FY17 Budget	School Committee	Finance Committee		
<b>Program Area</b>					
Regular Education	\$ 13,092,185	\$ 13,891,490		\$ 799,305	6.11%
Special Education	5,331,032	5,471,114	<b>at FinCom Guideline</b>	140,082	2.63%
Administrative Support	1,476,205	1,599,099		122,894	8.32%
Operations	3,311,281	3,727,526		416,245	12.57%
Fixed Costs	3,397,678	3,627,772		230,094	6.77%
<b>Operations</b>	<b>\$ 26,608,381</b>	<b>\$ 28,317,001</b>	<b>\$ -</b>	<b>\$ 1,708,620</b>	<b>6.42%</b>
<b>Debt Service:</b>					
debt reimbursed by state aid	\$ -				
debt paid from prior reserves	\$ -	\$ 167			
debt exclusion assessed	5,133,393	4,984,447			
	<b>\$ 5,133,393</b>	<b>\$ 4,984,614</b>	<b>\$ -</b>	<b>\$ (148,779)</b>	<b>-2.9%</b>
<b>Total</b>	<b>\$ 31,741,774</b>	<b>\$ 33,301,615</b>	<b>\$ 33,301,615</b>	<b>\$ 1,559,841</b>	<b>4.91%</b>
<b>Financing Sources</b>					
State aid	\$ 2,831,513	\$ 2,844,114		\$ 12,601	0.45%
District funds	675,000	725,000		50,000	
Assessments	28,235,261	29,732,495		1,497,234	5.30%
<b>Concord assessment ratio</b>	<b>73.61%</b>	<b>73.51%</b>			
without debt exclusion	\$ 17,035,005	\$ 18,192,290	\$ 18,192,290	\$ 1,157,286	6.79%
debt exclusion	3,748,971	3,664,067	3,664,067	(84,905)	
<b>TOTAL</b>	<b>\$ 20,783,976</b>	<b>\$ 21,856,357</b>	<b>\$ 21,856,357</b>	<b>\$ 1,072,381</b>	<b>5.16%</b>
<b>Carlisle assessment ratio</b>	<b>26.39%</b>	<b>26.49%</b>			
without debt exclusion	\$ 6,066,863	\$ 6,555,758		\$ 488,895	8.06%
debt exclusion	1,384,422	1,320,380		(64,042)	
<b>TOTAL</b>	<b>\$ 7,451,285</b>	<b>\$ 7,876,138</b>	<b>\$ 7,876,138</b>	<b>\$ 424,853</b>	<b>5.70%</b>

Long-term CPS Projects: Under a previous FY 2017 appropriation, a study is underway to make an assessment of the Concord Middle School buildings, the Sanborn School and the Peabody School. Currently a Statement of Interest Form is being submitted to the Massachusetts School Building Authority (MSBA), as a placeholder in a multi-year process, for a share of capital funding for replacement, renovation or modernization of school facility systems, or replacement of or addition to obsolete buildings. Concord's project will be in a queue with other towns and it may be a year or more before it can move to the next phase, a feasibility study.

### **Concord Carlisle Regional School District (CCRSD)**

The Concord assessment for the FY18 CCRSD total budget request (**Article 16**), as published in the Town Meeting Warrant is \$21,856,357 including a fixed \$3,664,067 assessment for debt, primarily related to the recently completed high school building. Subtracting the debt assessment results in a net operating budget assessment of \$18,192,290, which exceeds the Finance Committee Guideline of \$17,935,005 as of November 2016. Costs for additional buses and drivers to implement the High School Late Start initiative, adopted by the School Committee so that high school start times can better align with the natural circadian schedule of adolescent students, account for the excess assessment of \$257,285. Subsequent to publication of the Warrant, funds from a lower required OPEB contribution, savings from leasing, rather than purchasing, buses, as well as other sources have become available to cover the excess and it is anticipated that the request moved at Town Meeting will be for the original Finance Committee Guideline amount.

For both towns combined, the total budget request in the Warrant is \$33,301,609 including a fixed amount of \$4,984,609 in debt service resulting in a net operating budget of \$28,317,000, \$350,000 over the total Guideline budget. Concord is assessed at the rate of 73.51% of the total. As stated above, it is anticipated that the Guideline budget (\$27,967,000 for both towns combined (\$32,951,609 with debt service)) will be moved.

If the Guideline budget is adopted the increase, including debt service, will be 3.92% over the FY17 budget. Otherwise the increase will be 5.16%. Almost all of the debt is excluded from the Proposition 2 ½ limits on the property tax levy as a result of prior ballot votes in both Concord and Carlisle. The FY 2018 guideline assumes \$785,000 in funding from the High School Debt Stabilization fund created by the Town to help offset Concord's share of the levy for excluded debt of CCRSD and has been an important tool in limiting the initial impact of the debt service expense on Concord taxpayers. The annual financing cost for the debt repayment will represent 4.41% of Concord's tax bill in FY 2018, with the debt fully repaid by 2038. The budget request, not including debt service (the operating budget) is an increase of 5.28%. The five- year operating budget average increase is 2.90%.

In addition to the Late Start Initiative, cost drivers include projected salary and benefit escalation which will be affected by current negotiations regarding teachers' contracts. A place holder has been included in the FY18 budget anticipating a (1%) scale increase above previously negotiated escalation rates. Unlike the Town, OPEB, pension, and medical insurance costs for CCRSD are included in the net operating budget as they are assessed to the towns as part of the budget appropriation. The FY18 OPEB budget is expected to meet Annual Required Contribution (ARC) to be on schedule to fund the outstanding liability on a 30-year timeline. The Finance Committee is supportive of this commitment to reach its ARC and took it into account when setting the Guideline this year.

There are other cost drivers including purchase of one bus (regular fleet renewal, not Late Start) (\$100,000), other additional salary obligations (\$603,638), new programs: Senior Internship, Global Literacy, and Coding (\$136,421), Special Ed transportation (\$149,620), and additional building maintenance and capital outlay (\$149,620).

Concord's share of the CCRSD budget each year is driven by enrollment on the October 1st preceding the July 1 start of the budget year. Concord's FY18 assessment percentage continues to decrease this year from 73.61% in FY17 to 73.51% in FY18. This trend is predicted to change in the near future with growth in student enrollment across both CPS and CCRSD driven by general population growth created by new housing and new families moving into existing homes throughout Concord. Projections for future student enrollment prepared annually by NESDEC predict increases in the percentage of Concord students at the high school over the next 5 and 10 years peaking at nearly 77% between 2020 and 2025.

The CCRSD Landfill Cap (**Article 17**) remediates the former private landfill under the old high school parking lot. Remediation is mandated by the Massachusetts Department Environmental Protection. Last year the appropriation for the landfill remediation was voted down, largely due to uncertainty about the usability of the site after remediation. The new design will allow more flexibility for eventual use, including a sports field. The request is for \$1,200,000 in excluded debt and, if it is approved at Town Meeting, will require further approval at a separate ballot referendum.

### **Concord School Bus Transportation & Maintenance Center Project**

Construction is well underway at the School Bus Transportation & Maintenance Center on the recently acquired W.R. Grace land. The project is expected to be substantially complete in late June of this year and be ready before the 2017-2018 school year opens. All components, including the fueling system, will be included and the cost will be below budget. Significantly, difficulties with supplying water to the site were overcome at a cost substantially less than anticipated.

The Finance Committee works collaboratively with its colleagues on the school committees and in the School administration and Town management. It will continue to strive to balance the need to preserve affordability of residence in this community for a diverse population with the need for increased spending and appropriate resource allocation to provide a quality educational experience for Concord's students and families and for maintenance of a high quality of Town services.

## **Community Preservation Act**

The Community Preservation Act (CPA) was adopted by the Commonwealth in 2000 to assist Massachusetts communities in the preservation of open space and historic sites and to create affordable housing and recreational facilities. It allows a local surcharge on property tax bills of up to 3%. Local funds are supplemented by a state match received once annually. Initially and through October 2007, the state match was 100% of the prior year's local surcharge but in the past seven years has averaged about 20%. The CPA Fund may be used in four categories of expenditure:

1. to acquire, create and preserve open space;
2. to acquire and preserve historic resources;
3. to create, preserve and support community housing;
4. to acquire, create, preserve, rehabilitate, and restore land for recreational use.

Under the law, a minimum of 10% of revenues must be appropriated or reserved each year for each of three primary purposes: open space, community housing and historic preservation.

Concord's 2004 Annual Town Meeting enacted a 1.5% surcharge on property tax bills (Article 34), approved by 59% of more than 9,000 voters who cast ballots on the question at the polls in November 2004. The surcharge allows an exemption to residential property owned and occupied by any person who qualifies for (1) moderate or low-income housing (earning less than 80% of area median income) or (2) moderate or low-income senior housing (earning less than 100% of area median income and 60 years of age or older). For FY16, 33 exemption applications were granted by the Board of Assessors. The Concord vote also provides for exemption of the first \$100,000 of taxable assessed value before calculation of the surcharge.

The State matching funds are derived from a surcharge on Registry of Deeds' fees on property transactions and mortgage refinancing activity. Declines in fees collected during the economic downturn and a coincident increase in the number of cities and towns that have adopted the CPA surcharge (now at 172) has resulted in a reduction in the State match of the local surcharge. Through November 2016, \$4.9 million has been received into the fund from State distributions.

The Community Preservation Committee (CPC) is charged with the task of "studying the needs, possibilities and resources of the Town regarding community preservation." The Committee prepares an annual Community Preservation Plan. The Committee receives information from the Town's boards, commissions and officials, as well as information from other Town Planning documents, including the Comprehensive Long Range Plan. The Plan is available on the Town of Concord website, [www.concordma.gov](http://www.concordma.gov), at the Town libraries, and at the Planning Department, 141 Keyes Road.

Through the 2016 Town Meeting, \$17.3 million has been appropriated for CPA projects in the following categories:

- Historic Preservation 39%
- Open Space 16%
- Recreation 20%
- Community Housing 23%
- Administration 2%

### **Recommendations for 2017 Town Meeting, Article 29**

The CPC is proposing \$1,326,340 of project appropriations for 12 specific projects, two reservations and \$30,000 to cover direct administrative costs. Of this amount, \$1,326,340 will be appropriated from projected FY18 fund revenues and \$63,437 will be appropriated from the prior year available fund balance. The single largest proposed allocation is \$300,000 for Sleepy Hollow Cemetery Roadway and Stone Wall Improvements. The proposed allocation of FY18 projected fund revenues meets the minimum requirements:

- 51.72% will support historic preservation;
- 10.23% will support open space;
- 10.10% will support community housing.

In accordance with state law, Town Meeting may affirm, reject or reduce the allocation for any project recommended by the CPC, but may not increase an allocation and may not add a project not already put forward by the CPC.

The Finance Committee recommends Affirmative Action on Article 29 as proposed by the Community Preservation Committee.

<b>APPROPRIATIONS (by Fund Year):</b>	<b>FY14</b>	<b>FY15</b>	<b>FY16</b>	<b>FY17</b>	<b>Proposed FY18</b>
<b>Housing</b>	\$146,073	\$267,500	\$341,061	\$220,000	\$134,000
<b>Historic Preservation</b>	\$660,311	\$133,782	\$220,180	\$320,823	\$686,000
<b>Open Space</b>	\$146,073	\$182,520	\$130,000	\$160,683	\$135,670
<b>Recreation</b>	\$330,616	\$634,198	\$531,759	\$328,494	\$160,670
<b>Undesignated land acquisition</b>	\$150,000	\$0	\$0	\$250,000	\$180,000
<b>Administration</b>	\$30,000	\$30,000	\$30,000	\$30,000	\$30,000
<b>TOTAL*</b>	<b>\$1,463,073</b>	<b>\$1,248,000</b>	<b>\$1,253,000</b>	<b>\$1,310,000</b>	<b>\$1,326,340</b>
<b>10% of surcharge and state match: (minimum amount that must be allocated to Housing, Historic Preservation, Open Space)</b>	\$146,073	\$132,116	\$125,300	\$131,000	\$132,634

## **PROPOSITION "2 & 1/2"**

### **The "levy limit" explained**

Proposition 2 1/2 refers to an initiative statute adopted by the voters of the Commonwealth in November 1980. Its purpose was to restrict the increase of the property tax levy. It limits the amount by which the taxing capacity of the Town is allowed to increase each year. The allowed growth is 2.5 percent of the prior year's levy limit. For FY18, this allowed increase in the limit will be \$2,052,919 (which is 2.5% of the FY17 levy limit, \$82,116,773).

Added to the levy limit computation is the levy increase attributable to new growth. This represents additions to the base of taxable property, typically as a result of new construction, renovation and minor alterations, or change of use. Permitting the levy limit to be adjusted by new growth recognizes the fact that development creates pressures on Town services over the long term.

The assessment date for each tax year is January 1. The 2001 Annual Town Meeting adopted a state law allowing the physical improvements existing on property through each June 30 to be assessed with the taxable roll of the preceding January 1. Thus, new growth forecasted for FY18 is based on the activity of the current 12-month fiscal year ending June 30, 2017. The budget estimate is \$1,150,000, equivalent to about 1.4% of the FY18 total property tax levy.

Total growth of the levy limit is therefore attributable to two factors, one which is fixed (+2.5% per year) and one which is variable and subject to economic conditions. The total projected increase in the FY18 levy limit is thus \$3,202,919.

Additionally, the FY18 permitted tax levy will increase due to the added cost of debt service already approved by voters at the ballot box in prior years. The FY18 tax levy increase for excluded debt service

excluded from the levy limit is \$117,824. This is net of the proposed allocation from the High School Debt Stabilization Fund (\$785,000).

The property tax levy required to fund the proposed budget level is projected to be under the FY18 levy limit by \$3,910,411, a 4.5% margin, based upon current projections of other revenues and available resources.

<b>Levy Limit History</b>									
	Adjustments, prior years new growth	Allowed 2.5% increase in LL	New growth	Operating Override voted	Total allowed change in LL	Levy Limit	actual or projected levy	Unused Levy Limit	Unused as % of LL
FY13	\$4,307	\$1,676,287	\$1,183,336		\$2,863,930	\$69,911,105	\$67,034,708	\$2,876,397	4.11%
FY14		\$1,747,778	\$1,220,624		\$2,968,402	\$72,879,506	\$69,334,211	\$3,545,295	4.86%
FY15	\$2,462	\$1,822,049	\$835,499		\$2,660,010	\$75,539,516	\$71,897,151	\$3,642,365	4.82%
FY16		\$1,888,488	\$1,284,004		\$3,172,492	\$78,712,008	\$75,508,265	\$3,203,743	4.07%
FY17	\$23,518	\$1,968,388	\$1,412,859		\$3,381,247	\$82,116,773	\$77,784,021	\$4,332,752	5.28%
FY18 proj.	\$0	\$2,052,919	\$1,150,000		\$3,202,919	\$85,319,692	\$81,542,282	\$3,777,410	4.43%

## Overriding the levy limit

Once at the annual levy limit, the Town may exceed this limit only with a majority vote at a town-wide special or regularly scheduled election. Voters approved operating overrides for the Town government accounts and the schools for six consecutive years concluding with FY07 (ballot vote of June 6, 2006):

FY02 budget: \$2,249,022

FY04 budget: \$1,532,364

FY06 budget: \$752,480

FY03 budget: \$1,478,773

FY05 budget: \$1,858,160

FY07 budget: \$657,538

Sixteen- (16) debt exclusion ballots have also been approved by the voters since 1980 (see the section EXCLUDED DEBT). The most recent approval was a ballot in November 2011 for the construction of a new \$92.5 million Concord-Carlisle High School. The total debt exclusion tax levy for FY18, inclusive of the CCRSD debt assessment, is budgeted at \$6,381,790 (about 7.26% of the total projected tax levy). This is net of the proposed \$785,000 allocation from the Town's High School Debt Stabilization Fund. The major portion of this sum, \$3,350,911, about 3.81% of the projected tax bill, is the FY18 property tax share of debt service cost on long-term bonds issued for the Alcott, Thoreau and Willard elementary school projects. Between September 2004 and May 2011, a total of \$53,330,000 was issued as long-term debt to finance the construction of the three elementary school buildings. As of June 30, 2016, \$24,682,300 of this debt has been repaid, 46% of the total.

### FORMS OF OVERRIDES

The Town Meeting does not vote on overrides, or specify the ballot questions. By state law, overrides, capital outlay and debt exclusions are voted upon only at a town-wide election and require a simple majority vote for approval. State law gives the Select Board the sole authority to determine and specify the ballot questions. The Town Meeting's responsibility is to adopt budgets, and, when necessary, to specify whether and how much of an appropriation is to be contingent upon override or exclusion approval by the town-wide electorate.

Override votes may precede or follow Town Meeting action. A General Override or Capital Exclusion vote will show the amount of the override in the wording of the ballot question. A Debt Exclusion cannot, by state law, show the amount of the debt, but rather can only refer to the debt authorized or to be authorized by a vote of Town Meeting. Authorization of Town debt by the issuance of bonds requires a two-thirds vote in a specified amount at Town Meeting. There are several permitted forms of a vote to exceed the annual levy limit:

### **GENERAL OVERRIDE**

A majority vote of the Select Board (3 of 5) is required to place this question on a ballot. The dollar amount of the levy limit increase must be specified and, if approved, the vote permanently increases the limit. The question can be posed with respect to the total budget or by identifying allocations to specific departments.

### **CAPITAL OUTLAY EXCLUSION**

A two-thirds vote of the Select Board (4 of 5) is required to place this question on a ballot. If approved, the dollar amount of the override is effective for one year only. This form of vote can be used to authorize a capital purchase in lieu of a borrowing authorization. It can only be used for an expense that qualifies, under state law, for debt issuance authorization by the Town Meeting.

### **DEBT EXCLUSION**

A two-thirds vote of the Select Board (4 of 5) is required to place this question on a ballot. If approved, the override is effective only for the duration of the specified loan. The annual debt service amount (principal and interest payment) is added to the otherwise permitted annual levy limit.

## **Debt Management**

Prudent use of debt financing is an important part of the Town's overall fiscal planning. The central objective of any debt management approach is to borrow at the least cost over the term of repayment of the debt. Pursuit of this objective requires clear strategies regarding the purposes of the borrowing, when to schedule debt-financed projects, and how long to stretch out the repayment. Borrowing is a means of distributing part of a current capital cost to future taxpayers, and therefore should be utilized only when such cost allocation is deemed equitable and the long-term interest costs do not outweigh other benefits.

All debt of the Town is issued as general obligation debt. This means that the full faith and credit of the Town - its promise to repay from any source - is pledged to the bondholder. Debt issued on behalf of the Town's enterprise operations (water, sewer, light) is, however, fully supported by the revenues of the respective enterprise when this is stipulated by the authorizing vote of Town Meeting. The basic rules of debt issuance are set forth in the General Laws of the Commonwealth. Municipalities have no independent authority to develop their own rules or innovations.

Capital financing and debt management policy for Town debt supported by taxation within the levy limit is subject to the following guidelines:

- the total budget allocation for capital needs should be in the range of 7% to 8% of the total budget (town and K-8 schools);

- approximately one-third of capital needs should be met from current resources; the repayment of principal and interest, together with related issuance costs and short-term financing costs (i.e. debt service) should be capped at approximately 5% of the total budget;
- a rapid debt repayment schedule should be maintained, with a goal of 60% principal repayment within five years and 90% repayment within ten years.

These guidelines are modified for major projects supported by debt exclusion votes. The guidelines for debt to be financed within the levy limit serve several important purposes:

- capital needs are not displaced by the fiscal demands of current operations;
- the Town's approach to borrowing decisions is disciplined;
- the amount of debt service dollars expended for interest cost is minimized; about 19% of total FY18 debt service for long-term debt repayment will be expended for interest;
- the capacity to address ongoing capital needs is quickly and continuously restored.

Revenue-supported debt (water, sewer, light) is subject to different guidelines that consider the useful life of the project and the current interest rates in the marketplace (generally, debt issued for longer periods bears a higher interest rate).

On May 5, 2016, in connection with the Town’s most recent long-term bond issue, Moody's Investors Service reaffirmed the Town's credit rating of Aaa, its highest rating category. The rating report may be viewed on the Town’s website at [concordma.gov](http://concordma.gov). The Aaa rating had first been obtained in November 1987. The Town's credit rating is a measure of its overall fiscal health.

The benefit of a strong credit rating is realized in lower interest costs on the Town's long-term debt issues. Thus, to the extent that the Town plans to borrow in support of its future capital needs, a strong credit rating is a benefit to the taxpayers.

## Excluded Debt

FY18 gross debt service on all excluded debt authorized is projected to be \$7,168,991, as follows:

\$3,607,507	Town Departments, including Concord Public Schools
\$3,561,484	Concord-Carlisle Regional Schools District, Concord’s Share

This amount is offset by a transfer of \$785,000 from the *High School Debt Stabilization Fund* (Article 29) and a premium in the amount of \$2,201. The balance, or \$6,381,790, is the net excluded debt which will be levied. This amount represents 7.26% of the total tax levy.

The major portion of the Town debt is for the three elementary school projects. The FY18 tax levy will include \$3,350,910 for Alcott, Thoreau and Willard School projects.

<b>Tax Levy for Excluded Debt</b>									
<i>projected to FY23, including share of High School debt</i>									
	<b>FY16</b>	<b>FY17</b>	<b>FY18</b>	<b>FY19</b>	<b>FY20</b>	<b>FY21</b>	<b>FY22</b>	<b>FY23</b>	<b>Final</b>
<b>Debt Issued:</b>	<b>Actual</b>	<b>Budget</b>	<b>Projected</b>	<b>PROJECTED</b>					<b>Fiscal Yr</b>
Concord-Carlisle H.S.	\$ 3,514,429	\$3,668,218	3,561,484	\$3,560,313	\$3,420,014	\$3,397,131	\$3,140,990	\$3,046,760	2038
Harvey Wheeler Building	103,694	0	0	0	0	0	0	0	2016
Alcott School	638,667	624,369	594,505	573,280	553,215	530,320	512,068	347,850	2025
Thoreau School	1,234,619	1,192,876	720,247	645,630	605,695	569,365	534,068	498,310	2026
Willard School	2,128,091	2,089,494	2,033,947	1,814,900	1,772,625	1,730,350	1,684,950	1,637,850	2029
Wastewater Plan, Phase 1	101,212	101,089	99,925	99,794	99,794	99,794	99,794	99,794	2026
<b>subtotal</b>	<b>\$ 7,720,712</b>	<b>\$ 7,676,046</b>	<b>\$7,010,108</b>	<b>\$6,693,917</b>	<b>\$6,451,343</b>	<b>\$6,326,960</b>	<b>\$5,971,869</b>	<b>\$5,630,564</b>	
School Transportation Facility, est.			156,682	265,200	257,400	249,600	241,800	234,000	2029
			\$7,166,790	\$6,959,117	\$6,708,743	\$6,576,560	\$6,213,669	\$5,864,564	
<b>less HS Stabilization Fund</b>	<b>(1,500,000)</b>	<b>(1,000,000)</b>	<b>(785,000)</b>	<b>(250,000)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
<b>less MSBA Thoreau grant</b>	<b>(409,878)</b>	<b>(409,878)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	
<b>NET from property tax levy</b>	<b>\$5,810,834</b>	<b>\$6,266,168</b>	<b>\$6,381,790</b>	<b>\$6,709,117</b>	<b>\$6,708,743</b>	<b>\$6,576,560</b>	<b>\$6,213,669</b>	<b>\$5,864,564</b>	

The following is a summary of the debt exclusion authorizations for which debt service is included in the FY18 budget.

#### **Alcott School (2002) – \$9,365,000 issued, final payment in FY25**

On June 19, 2002, voters approved excluding the debt for construction of the new Alcott School, a \$16.7 million authorization approved at the 2002 Annual Town Meeting. The ballot vote was 2,208 to 1,477. The design and construction portion of this authorization, about \$14.2 million, was audited by the state in the summer of 2006 and received a lump-sum state grant of \$7.2 million in September 2006. A 20-year bond for \$7 million, representing the major portion of our anticipated local share for the construction phase, was issued in September 2004 at a favorable 3.7% interest rate. The second phase of work, demolition of the original building and site work, commenced in the summer of 2006 following the relocation of Thoreau students to their new school building after two years in temporary residence at the old Alcott School. No further state grant was earned for Phase 2 of the Alcott project. A 15-year bond for \$2.35 million was issued in February 2007 at a rate of 3.87%. A one-year bond for \$15,000 was issued in March 2009 at a rate of 1.17%. In May 2016, the Town called the remainder of the 2007 bonds (\$737,400) and reissued new debt at a rate of 0.8915%

#### **Thoreau School (2004) – \$16,940,000 issued, final payment in FY25**

On June 8, 2004, voters approved excluding the debt for new construction and reconstruction (1994 wing) of the Thoreau School, a \$16.8 million authorization approved at the 2004 Annual Town Meeting. The ballot vote was 3,421 to 1,899. A further \$350,000 was authorized by Town Meeting vote in April 2006. An 18-year bond for \$10 million was issued in September 2006 at a favorable 3.85% interest rate. An 18-year bond for \$6.8 million was issued in September 2007 at a 3.99% rate. A 3-year bond for \$140,000 was issued in March 2009 at a 1.49% rate, completing the Thoreau School permanent financing. In May 2015, the Town called the remaining portion of the 2006 bonds (\$1,201,500) and reissued new debt at a rate of 1.449%. In May 2016, the Town called the remaining portion of the 2007 bonds (\$2,804,400) and reissued new debt at a rate of 1.177%.

#### **Wastewater Management Plan, Phase 1 (2004) – final payment in FY26**

On June 8, 2004, voters approved excluding the debt for construction of sewer system extensions in the West Concord and Elm Brook neighborhoods. The ballot vote was 3,392 to 1,851. A debt authorization of \$4,190,000 was approved by the 2004 Annual Town Meeting, the debt to be issued through the state Water Pollution Abatement Trust at a subsidized interest rate of 2%. The Town meeting voted to allocate this debt among the General Fund, the Sewer Fund and betterments. The property tax share of the debt is approximately \$1,640,000. The debt was executed with the State in November 2005 and principal repayment commenced on a 20-year schedule beginning July 2006.

**Willard School Design (2006) – \$1,840,000 issued, final payment in FY18**

On March 28, 2006, voters approved excluding the debt for design cost of a new Willard elementary school. The ballot vote was 2,080 to 1,747. Town Meeting subsequently authorized \$1,840,000 for this purpose. This amount was financed as part of the April 1, 2008 bond issue, with a ten-year maturity schedule at a 3.11% interest rate.

**Concord-Carlisle High School (2006 and 2007) – final payment in FY18**

On June 6, 2006, voters approved a debt exclusion for Concord's share of \$1,200,000 for renovations at the regional high school, pursuant to the vote of the 2006 Annual Town Meeting. The ballot vote was 1,209 to 778. On March 27, 2007, voters approved a debt exclusion for Concord's share of \$1,245,000 for renovations at the regional high school, by a vote of 959 to 514. This debt was subsequently authorized at the April 2007 Annual Town Meeting. These authorizations were combined and issued by the District as a 10-year \$2.445 million bond on December 15, 2007, at a 3.33% interest rate.

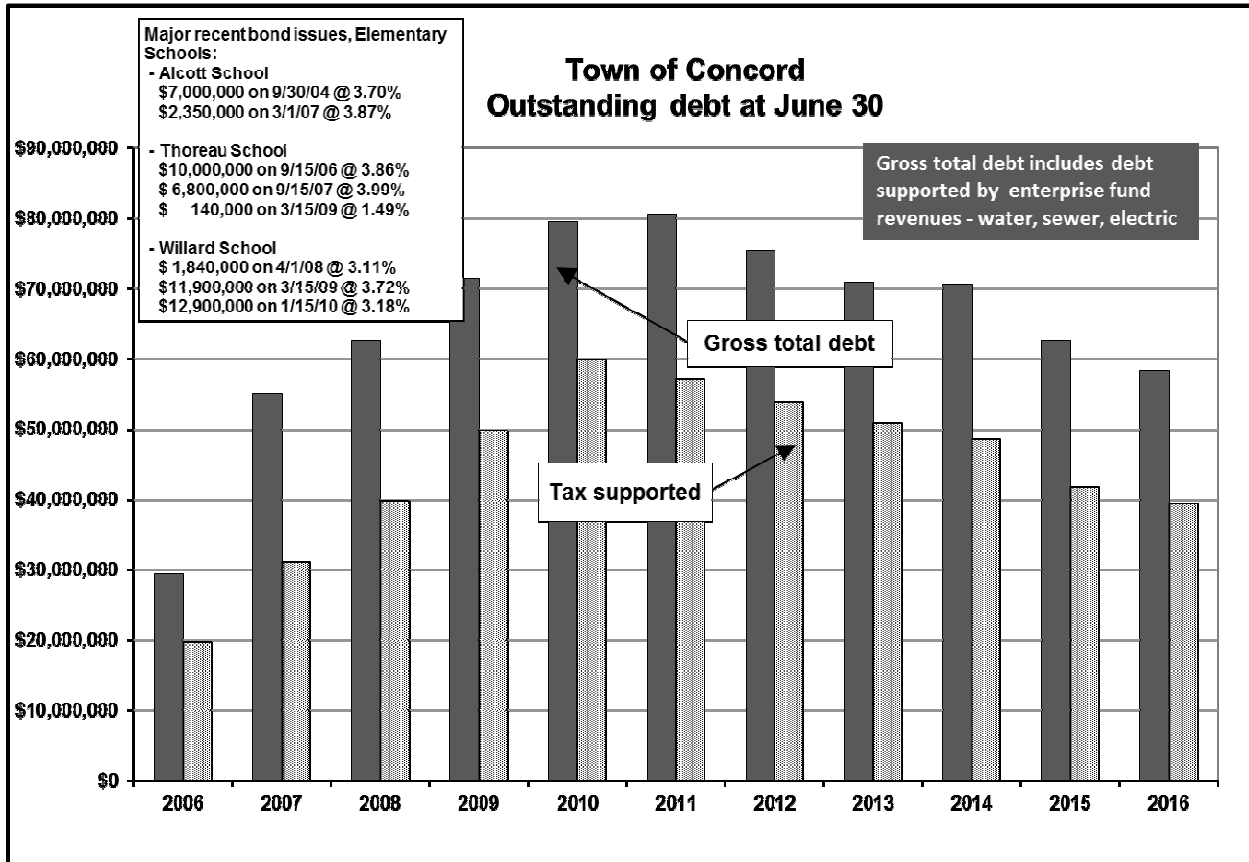
**Willard School construction (2007) – \$25,175,000 issued, final payment in FY28**

On November 14, 2007, voters approved \$29.4 million for construction of a new Willard Elementary School, by a vote of 2,160 to 1,200. The project is scheduled for fall 2009 completion. A 19-year bond was issued for \$11.9 million in March 2009 at a 3.72% interest rate. A second 19-year bond was issued for \$12.9 million in January 2010 at a 3.18% interest rate. A 4-year bond was issued for \$375,000 in May 2011 at a 1.06% rate, completing the Willard permanent financing.

**Concord-Carlisle High School (2010 and 2011)**

On June 8, 2010, voters approved a debt exclusion for Concord's share of \$1,300,000 for a feasibility study and schematic design of a renovated or new CCHS building. The ballot vote was 1,809 to 450.

On November 15, 2011, voters approved a debt exclusion for Concord's share of a \$92,578,000 new High School, following the MSBA approval of a maximum facilities grant on September 28, 2011, at 35.58% of eligible costs. The ballot vote was 3,571 to 659. This vote incorporated the earlier \$1.3 million debt authorization. The projected net local cost of the project is approximately \$64.5 million. A \$32.5 million serial maturity bond was issued by the Regional School District on June 4, 2013 at a 3.00% interest rate, with final maturity in FY38. Principal repayment commences in the FY14 budget period. A \$30 million serial maturity bond issue was issued on March 15, 2015 at a 2.87% interest rate, with final maturity in FY38. Permanent financing will be completed in 2016 after all site work and the MSBA audit is completed.



## Town of CONCORD, LONG-TERM DEBT STATISTICS

Direct Debt - June 30, 2006 to June 30, 2016

@ June 30	Assessed Value	Outstanding Long-term Debt		Population <i>decennial census</i>	per capita income <i>decennial census</i>	% of Assessed value		Debt per capita		Debt per capita as % of per capita income	
		Gross	Net			gross debt	net debt	gross debt	net debt	gross debt	net debt
2006	\$5,207,535,371	\$29,542,533	\$19,758,290	16,993	\$51,477	0.57%	0.38%	\$1,739	\$1,163	3.38%	2.26%
2008	\$5,498,736,316	\$62,606,176	\$39,739,546	16,993	\$51,477	1.14%	0.72%	\$3,684	\$2,339	7.16%	4.54%
2010	\$5,026,552,229	\$79,599,890	\$59,831,473	16,993	\$51,477	1.58%	1.19%	\$4,684	\$3,521	9.10%	6.84%
2012	\$5,090,058,629	\$75,393,732	\$53,893,601	17,668	\$67,374	1.48%	1.06%	\$4,267	\$3,050	6.33%	4.53%
2014	\$5,130,493,662	\$70,598,766	\$48,544,694	17,668	\$67,374	1.38%	0.95%	\$3,996	\$2,748	5.93%	4.08%
2016	\$5,841,889,295	\$58,382,966	\$39,391,306	17,668	\$67,374	1.00%	0.67%	\$3,304	\$2,230	4.90%	3.31%

**"Net debt" is tax-supported, net of self-supporting debt issued for the water, sewer and electric funds.**

**EQV and Debt:** The Town's Equalized Valuation (EQV) is set by the state biennially. The value set at Jan. 1, 2014 is \$5,540,602,300.

This EQV is used in various state formulas for FY15 and FY16. By state law (MGL c. 44, § 10), the Town's debt limit is capped at 5%

of its EQV. The Town's gross outstanding debt as of June 30, 2016 is 1.05% of EQV.



## State Aid

State aid is received for general town purposes and is not restricted in use, although it is often discussed as if earmarked for “school aid” and “general or non-school aid”. “Chapter 70” school aid and the distribution of the net lottery proceeds (Unrestricted General Government Aid) are the major components of Concord’s aid. Concord receives a minimum statutory Chapter 70 allocation, due to its income and property wealth measures.

### *State Aid and the State’s fiscal position*

State Aid is a significant component of the State Budget, equivalent to about 22% of own-source state revenues. Aid is distributed to the cities and towns through a variety of formulas, most of which provide aid to communities based upon relative need as measured by property and income characteristics. Funding to be received by Concord in FY18 represents about 5.6% of the Town’s total \$101.9 million General Fund budget (town departments and education combined) while property taxes supported 86.2% of the budget.

After peaking in fiscal year 2009, state aid to municipalities and regional school districts weathered a cut of about 12% statewide over the next two years. Five years later, after gradual increases, Governor Baker’s FY16 proposal to increase state aid by 2.1% would finally regain the dollar level last seen in FY09. Concord’s recent state aid history reflects a steeper drop, from \$4.5 million as the initial FY09 allocation (before a mid-year cutback) to \$3.64 million received in FY12 year, a drop of almost 20%.

The Governor’s January proposal for the FY18 state budget proposed a modest increase state aid for most communities for the coming year. While action by the legislature will not be completed until June, early indications of the intent of Beacon Hill are favorable.

The financial plan being presented for Concord’s Town Meeting therefore incorporates a FY18 state aid estimate of \$4,650,000, a very slight increase over the current fiscal year based on the Governor’s proposal.

## Free Cash

**Article 19– Free Cash Use to reduce Tax Levy**

**Article 14 – Free Cash appropriation for FY17 CPS Supplemental Appropriation**

**Article 23 – Free Cash appropriation for Acquisition of 55 Church Street**

**Article 30 – Free Cash appropriation for Junction Village Affordable Assisted Living Facility**

**Article 51 – Free Cash appropriation for Concord’s Energy Goals**

### **Stabilization Funds**

**Article 7 – High School Debt Stabilization Fund**

### **Free Cash**

The accumulation and use of “Free Cash”, which is available undesignated fund balance of the General Fund, is an important component of the Town’s overall financial management policies. These policies maintain the Town’s ability to respond to emergencies, promote the stability of service levels and control the rate of tax levy change.

The undesignated fund balance may be appropriated in either of two forms: (1) for specific expenditures or (2) to reduce the tax levy that otherwise would be required. The available amount is calculated and certified each year by the Commonwealth’s Department of Revenue based upon the balance sheet submitted by the Town.

The General Fund Balance, sometimes referred to as “surplus” or “surplus revenue,” is the amount by which cash and receivables exceed current liabilities and commitments. In a business sense, this might be thought of as “liquidity.” In a personal sense, it can be thought of as “available savings” - at least the portion of savings that cannot be claimed by any other creditor and that is available without requiring the sale of property or other fixed assets.

It is customary for the Annual Town Meeting to allocate some portion of the General Fund Balance to the support of the ensuing year’s expenditure plan. In some years, these savings used are more than replenished from operations, while in other years the year-end return from unexpended appropriations and from revenues overestimates (if any) is insufficient to fully restore the Town’s accumulated reserves. The sums voted by each annual Town Meeting for use in the ensuing fiscal period are deducted and reserved prior to each June 30 certification.

#### Free Cash allocated to FY18 Budget support

The Finance Committee’s Budget Guideline plan recommends an allocation of \$1,000,000 to support the FY18 operating budgets. The Committee annually reviews the Free Cash policy and has reaffirmed the commitment to keep the unused Free Cash Balance in a range of 5% to 10% of the total ensuing budget, a level deemed essential to enable the Town to cope with unexpected circumstances. The Town’s actual Free Cash level has been above this range in recent years due to positive operating results and has been an important factor in the maintenance of the Town’s Aaa credit rating through the recession and slow recovery period.

Any favorable budget variances from current year operations (actual revenues in excess of the FY17 budget estimate, and/or any FY17 appropriations that remain unspent at year end) will become part of the June 30, 2017 Free Cash balance. This balance will be available to the next Annual Town Meeting in 2018 for allocation in support of future budgets. The results of FY17 operations are presently expected to restore all or most of the Free Cash balance proposed for allocation to FY18 budget support at the 2017 Town Meeting. The Committee is recommending allocation of \$1,000,000 (Article 19).

#### **High School Debt Stabilization Fund**

The Special Town Meeting of November 7, 2011 approved the borrowing authorization of \$92.5 million for a new high school building as voted by the Regional School District Committee. The Massachusetts School Building Authority is covering 35.58% of the eligible portion of this cost, based on an Estimated Facilities Grant of \$27 million, reimbursing the district as construction bills are incurred. The total local share of the project cost is projected at about \$65.1 million. Thus far, \$65.1 million of the local share has been permanently financed through the issuance of long-term bonds. Compared to the projection made in November 2011, the taxpayer cost of the project through 2038, the final year of bond repayment, is estimated to be lower than the projected cost by about \$2.7 million, as the bonds have been sold at a lower interest cost than had been initially estimated. A May 2013 bond issued for \$32.5 million (with repayment over 25 years) was sold at a 3.0% interest rate. A March 2015 bond of \$30 million (with repayment over 23 years) was sold at 2.87%, and a \$2.5 million bond (with repayment over 22 years) was sold in February 2016 at 2.40%.

Debt service on this borrowing will be assessed annually to Concord and Carlisle based on the same student population ratio as is used to allocate the net operating budget costs. Long-range student enrollment projections are subject to uncertainty but indicate at this point that Concord’s share will average about 74.6% over the next five years (FY18-22), but could average about a 77% share for the next five-year period (FY23-27). These assumptions were used in updating the Finance Committee’s five-year forecast. The maximum tax bill impact of the High School debt (net of allocations planned from the High School Debt Stabilization Fund) is projected to occur in FY20, when debt service on the High School bonds will be about 3.5% of the total tax bill. Thereafter, debt service on the high school bonds begins to decline; by 2030, Concord’s assessed share is projected to be 2.1% of the total tax bill.

Recognizing the significant tax increase that results from the project, the Concord Select Board and Finance Committee in 2011 proposed the establishment of a new Debt Stabilization Fund, modeled on the Fund created in 2008 to address the Elementary School (Alcott, Thoreau and Willard) debt impact. Town Meeting action over several years appropriated a total of \$4,250,000 to this Fund from Free Cash. Through the current budget year (FY17), \$3,230,000 has been appropriated from this Fund to reduce the tax levy that otherwise would have been required. \$1,035,000, including interest earnings, remained uncommitted as of June 30, 2016.

The present plan, represented in the table appearing on the “Excluded Debt” page in this Report, is to allocate the Stabilization Fund remaining balance (about \$3.5 million including the new recommended addition) over the next two years as follows:

- FY18 \$ 785,000 (Article 7); and
- FY19 \$250,000

These allocations will make the annual tax bill adjustments more uniform while also lowering the peak impact on taxpayers. The Finance Committee is recommending affirmative action on Article 7 in the amount of \$785,000 appropriated from the High School Debt Stabilization Fund to reduce the FY18 tax levy that would otherwise be required for Concord’s assessed share of CCRSD debt service.

### **Free Cash appropriations**

At June 30, 2016, the Town’s certified Free Cash of \$12,605,955 is equal to 12.8% of the FY17 budget total. This is an increase of \$1.565 million from the prior year and was the result of a number of favorable financial developments in FY16. The Free Cash position gives us greater flexibility to address spending requirements on the Town Meeting warrant. Specifically the Finance Committee recommends that the following items be funded from the Free Cash balance:

- \$1,000,000 be appropriated to reduce the Tax Levy under Article 7; and
- \$1,200,000 be appropriated to acquire 55 Church Street under Article 23;

The proposed Free Cash uses recommended above will bring the balance to about 10.59% of the FY17 budget level before consideration of any positive results from current year operations. The Finance Committee will hold its recommendation on the following Free Cash Appropriation requests until Town Meeting:

- \$400,000 to be appropriated for FY17 Concord Public Schools Supplemental Budget under Article 14;
- \$1,000,000 to be appropriated for Junction Village Affordable Assisted Living Development under Article 30; and
- \$200,000 to be appropriated for Concord’s Energy Goals under Article 51.

Below is a chart showing historical activity relative to Free Cash Appropriations and the requested appropriations for the 2017 Annual Town Meeting.

Free Cash									
Undesignated Fund Balance									
BALANCE				USES					
at June 30	Certified	next budget		Fiscal Year	for budget support	for Stabilization funds	for specific appropriations		
2010	8,635,340	11.1%		2012	850,000			24,822	
2011	9,567,656	11.9%		2013	850,000	\$2,000,000			
2012	9,357,662	11.3%		2014	850,000	750,000			
2013	9,664,489	11.2%		2015	850,000	750,000			
2014	11,084,916	12.3%		2016	950,000	750,000		625,000	
2015	11,040,933	11.5%		2017	1,000,000				
				<i>Proposed</i>					
2016	\$ 12,605,955	12.3%		2018	\$1,000,000	\$0		\$2,800,000	

## Reserve Fund Transfers

The Reserve Fund is an appropriated contingency account. It is part of the Town Government budget (item 32 of Article 7, proposed at \$225,000) and is counted within the Finance Committee's budget guideline for Town Government operations (Article 7, items 1-34). It is allocated during the budget year by vote of the Finance Committee pursuant to the request of the Town Manager. By state law, its use is restricted to "extraordinary or unforeseen expenditures". In FY16, \$36,500 was allocated and \$188,500 was returned unexpended at the end of the budget year.

The Town budget is adopted as a series of separate appropriations (Article 7, items 1-39). Funds are not transferred from one appropriation account to another except by Town Meeting action. Only the Reserve Fund appropriation may be used during the fiscal year to supplement other appropriation accounts, except that in the final three months of the budget year any appropriation balance may be transferred by joint approval of the Finance Committee and the Board of Selectmen. This latter provision was added by state law in 2003 as a safety valve for communities that exhaust their Reserve Fund account. Concord has never used this provision of state law.

The budget contingency process works differently for the Concord Public Schools budget (Article 13). State law gives the School Committee the "bottom line" power to authorize transfers within its appropriation total voted

by Town Meeting. At the end of each fiscal year, funds in appropriation accounts that are not spent are returned to the General Fund balance.

The FY18 Reserve Fund appropriation recommendation of \$225,000 is about six-tenths of one percent (0.6%) of the total Article 7 recommendation. State law allows the Reserve Fund appropriation to be as much as 5% of the previous tax levy; this would permit a Reserve Fund appropriation of \$4.2 million. The Concord Finance Committee has not felt that such a large contingency account would be consistent with the objective of fostering tight expenditure control by Town and School administrations.

<i>Reserve Fund Uses, FY2016</i>		
<b>Town Account</b>	<b>Amount</b>	<b>Purpose</b>
Veteran's Benefits	26,500	Additional beneficiaries, mandated payments
Building Inspections	10,000	Increased staffing for greater inspection volume

## Observer Reports

### Board of Assessors

The Assessing Division of the Finance Department is responsible for the fair and accurate listing and assessment of all real estate and personal property for taxation purposes, in accordance with State statutes and regulations. The five-member Board of Assessors, appointed by the Town Manager, is the decision-making body with respect to all property valuation determinations. Assessments for the purposes of taxation are required to be at market value each year. All local boards of assessors in Massachusetts are overseen and subject to the rules and regulations set forth by the State's Bureau of Local Assessment. The valuation process and statistical validation must be certified by that agency each year (with on-site review every three years, soon to be five years). The next state review will be in FY18.

Each year's valuation is based upon market sales in the calendar year preceding the valuation date. Thus, the valuations used for the current year (FY17) tax billing, the year July 1, 2016 through June 30, 2017, is based upon a valuation date of Jan. 1, 2016 and the actual sales occurring in calendar year 2015. The FY17 assessment included shifts in market area factors, building style base rates and increases in out-building values.

Based on the most recent biennial survey of Concord residents conducted in the fall of 2016, 62% of Town residents felt that their properties were "fairly assessed" or "under assessed", while 29% felt their properties were "over assessed" and 9% expressed no opinion.

Following the Tax Classification Public Hearing Nov. 14, 2016, the Board of Selectmen voted to support the Board of Assessor's FY17 recommendations that all classes of property (residential, commercial, industrial, personal) be taxed at a uniform tax rate, and that no discounts for open-space, small commercial, or residential exemptions be adopted. This recommendation has been applied consistently since FY98.

For FY17 (valuation date Jan. 1, 2016), the total assessed value of real estate in Concord is \$5.97 billion. This represents an increase of 2.26% over FY16; new growth—the taxable value attributable to new construction—accounted for approximately 77% of the increase, and existing properties accounted for the remaining increase in value.

The Board of Assessors calculates the uniform tax rate, which is the overall tax levy required to balance the Town budget divided by the total Town's assessed value. For FY17, the tax rate increased to \$14.07 per \$1,000 of assessed value (from \$13.92 in FY16). The property tax levy is subject to an annual levy limit. Exceeding the levy limit requires majority approval of the voters at a Town-wide election (not at Town Meeting). Concord's FY17 tax levy is below its current levy limit by about \$4.3 million, or about 5%.

Class	FY2016 Valuation	FY2017 Valuation	Change	% Change
Residential	\$5,339,204,392	\$5,470,440,285	\$131,235,893	2.46%
Commercial/ Industrial/ P. Property	\$502,684,903	\$503,276,117	\$ 591,214	.12%
Total	\$5,841,889,295	\$5,973,716,402	\$131,827,107	2.26%

## Concord Municipal Light Board

The Concord Municipal Light Plant (CMLP) is one of forty-one municipal electric utilities in the Commonwealth. Since its inception in 1898, the goal of CMLP as a community owned and operated utility, has been reliable and reasonably priced service provided in a responsive and thoughtful manner.

The CMLP operates as a self-sustaining, non-profit Enterprise Fund within Town government. All of CMLP's operating, capital, and debt service expenses are paid solely from revenues paid by customers. An additional marker of its ability to be self-sustaining is the fact that the Light Plant pays for its share of the use of Concord's services through a Payment in Lieu of Taxes (PILOT) to the Town. The budgeted payment for FY 2018 is \$474,000.

Concord's Town Manager appoints a five-member citizen board that serves in an advisory capacity. The Light Board meets monthly to discuss rates, power supply and renewable energy options, and the Board welcomes citizen attendance and comments. The Board is mindful of the Town Select Board's Values and Guiding Principles, including sustainable management of energy and resources, and the Light Board has published both a Renewable Energy Strategy and a Large-Scale Solar Strategy.

Electricity from renewable energy sources equals approximately 23% of the kilowatt hours of all purchased power. The Light Plant Board's goal is to increase the percentage of renewable energy to 30% by 2020. The Light Plant has also initiated programs and policies to encourage energy conservation. A three-tier residential rate structure was adopted in May 2015 to provide an economic incentive as one such measure. A variety of rebate programs are also available to residential and commercial customers.

Additionally, CMLP is seeking approval of up to \$3 million of borrowing by the Town Treasurer in order to upgrade the Light Plant's Smart Grid Infrastructure. CMLP has had a limited Smart Grid has been in place for five years, and this borrowing would allow for accelerated deployment of smart meters throughout town. Planned enhancements also include improved response to customer electricity demands, additional live meter

data analysis, outage notifications, and street light control upgrades to include dimming capability and fixture health monitoring.

In a development that could not have been imagined at its founding, CMLP began offering high-speed internet service over its 100% fiber optic system to the community in early 2014. Today, there are approximately 800 subscribers. Demand remains strong, and the Telecommunications Department's 2017 Plan calls for it to end the year with 1,100 subscribers.

CMLP utilizes a portfolio approach to its power procurement, balancing a mix of short and long term contracts, fixed and spot market pricing, and continues to seek reasonably priced renewable energy sources.

CMLP and the Light Board maintain robust information pages at the Town website: [www.concordma.gov](http://www.concordma.gov) where copies of their published Strategies, CMLP product offerings, customer incentives and assistance, industry information, and purchased power portfolio chart may be found.

## **Concord Retirement Board**

The Retirement Board administers the town's Contributory Retirement System for public employees in accordance with State law MGL Chapter 32. State law establishes all procedural rules and benefit formulas. The retirement system covers the majority of municipal employees working at least 25 hours per week, with the exception of Concord Public School and Concord-Carlisle Regional School District (CCRS) teachers (who participate in a separate retirement system administered by the State Teachers' Board). The employer groups covered by the system include the Town of Concord, the Concord-Carlisle Regional School District and the Concord Housing Authority. The Town's retirement system is overseen by the Massachusetts Public Employee Retirement Commission (PERAC), which has oversight of all public retirement plans in the Commonwealth. Employees and the town each contribute 50% toward the estimated cost of an employee's pension benefits although the town is additionally responsible for any shortfall in plan assets.

The most recent actuarial valuation report for the Concord Retirement System was published in June 2016. As of January 1, 2016, the actuarial value of plan assets grew \$11.0 million to \$137.8 million and the liability for future benefits increased \$10.5 million to \$167.0 million. The unfunded pension liability as of January 1, 2016, which is the difference between plan assets and plan liabilities, totaled \$29.1 million. This liability grew, in part, because the Retirement Board chose to lower the expected rate of return on plan assets from 7.25% to 7.00%, (the lower the rate, the more conservative the estimate). The Board felt this decrease better reflected current financial conditions. To compensate for this reduction and still meet plan obligations for 2030, required employer contributions to retirement for FY18 will increase \$250,000 for the Town and \$40,000 for the CCRSD. According to PERAC information ([www.mass.gov/perac](http://www.mass.gov/perac)), only 2 of the 105 town retirement systems have adopted a lower rate than Concord. In addition, Concord's plan uses an updated mortality table which also contributes to a more conservative estimate of the liability (newer tables use longer life spans). Despite the conservative methodology, Concord's funding ratio (assets divided by liabilities) held steady at 82.5% ranking it ninth highest in the state. For FY18, the expected annual appropriation from the General Fund for the Town's share of pension costs is \$3.3 million, or approximately 3.4% of the FY18 budget. The Finance Director projects this amount to increase at an annual rate of 3%. Under these assumptions, the plan remains on track to eliminate the unfunded pension liability by 2030.

Actual investment returns for 2016 were favorable and the town retirement plan's three-year return is close to the actuarial assumptions. Actual performance over the last 10 years has varied in part driven by economic conditions. Concord Retirement System Assets are split between a Pension Reserve Fund (6.2% of assets) and

the Concord Retirement Fund. Periodically funds are reallocated within the Retirement Fund to achieve a target blend of investments in Fixed Income, Real Estate and Equity of 35%, 5%, and 60% respectively. This type of reallocation was made in September 2016 where 2% of funds (approximately \$3 million) were moved from Equity to Fixed Income. This reallocation actually helped improve total asset returns which as of January 31, 2017 were up 12.73% over one year earlier. Over the last 3 years, the market value has increased on average 7.29% compared to the state's Pension Reserve Investment Trust (PRIT) 3 year yield of 6.94%.

One trend being monitored by the Retirement Board is the concept of an Outsourced Chief Investment Officer (OCIO). Under this type of model, the OCIO takes responsibility for selecting fund managers and implements funding policies as defined by the Retirement Board. The OCIO would be accountable to the board for fund performance. The Retirement Board today hires Fund Managers, approves investment fund changes and ensures compliance with all state regulations. There is not one common OCIO model used by municipalities today and the Board would have flexibility in structuring the arrangement. The board has not made a decision to pursue this model, but is continuing to educate themselves on how these models are evolving and to understand the benefits that this type of model could bring to Concord.

## **Recreation Commission**

The Recreation Commission is appointed by the Town Manager and is responsible for setting policy directions for the Concord Recreation Department. The Recreation Department operates a number of programs to provide year-round recreational opportunities for members of the community, and last year provided services to over 8,000 children and adults. Major services include swim and fitness programs at the Beede Swim and Fitness Center, preschool and after-school childcare serving children between the ages of 3 and 11, summer day camp, a musical theater program, and a wide variety of sports programs and activities for children and adults.

The Department has an annual operating budget of approximately \$4.3 million and approximately 40 full-time-equivalent employees. Recreation programs are funded primarily through user fees and are intended to be self-supporting, requiring no additional funding from taxpayers.

**The Beede Center** is operated as the Swim and Fitness Enterprise Fund, established by a Town Meeting vote in 2005. As an enterprise operation, the facility is expected to be self-supporting, not only with respect to operating cost but also with respect to capital costs, including the maintenance of the building.

Located on the campus of the Concord-Carlisle Regional High School, the facility opened in April 2006. The facility was constructed without public funds, entirely from gifts through a fund-raising effort launched on the base of a bequest from the Alfred Sawyer Trust. Now in its 10th year, the Center continues to be a vital and popular community resource, serving over 3,600 community members. It has operated without taxpayer support or subsidy.

The Center, which has approximately 20 full-time-equivalent employees, offers a number of popular swim and fitness programs, personal training, and a Concord Otters youth swim team program. Membership renewals have been high, suggesting positive member experiences. In recent years however, an increasing number of members have been concerned with the price of membership, as revealed by the biennial Town Government Survey. In the latest survey, conducted in the fall of 2016, 64% of respondents, and 85% of respondents under the age of 45, found the price of membership to be "excessively priced".

The fiscal year that ended June 30, 2016 had total operating revenues of \$2.3 Million and a net operating loss of approximately \$24,000. As of June 30, 2016, the Beede Center had an Operating Fund balance of \$1.29

Million. This amount is added to in years with positive net income, and is drawn down in years with negative net income. For FY17, operating revenues are expected to decrease approximately 1%, with a projected operating loss of approximately \$155,000, due primarily to increased personnel and facilities and maintenance expenses.

As of June 30, 2016, the Center had a Depreciation Fund Balance of approximately \$1.2 Million. Maintaining a sufficient depreciation reserve ensures that the Center will be able to finance needed capital equipment replacements and maintain the condition of the facility with its own resources, as has been accomplished to date.

The Enterprise Fund budget for the Beede Center is Article 58 on the Warrant for Town Meeting. The proposed budget for FY18 is \$2,518,183 for operating expenses (funded \$2,363,345 from estimated revenues and \$154,838 from undesignated Operating Fund Balance) and \$171,000 for capital expenses (funded from undesignated Depreciation Fund Balance).

**The Recreation Department** offers a wide variety of popular child and adult recreation programs. These programs are funded primarily through user fees and are intended to be self-supporting for all direct program expenses. The General Fund covers capital and operating expenses related to buildings and facilities. The Town Manager's FY18 proposed budget also includes approximately \$75,000 in General Fund support for the recreation director's salary and approximately \$110,000 in General Fund support for the Hunt Recreation Center (includes Rideout & 105 Everett Street).

For the fiscal year that ended June 30, 2016, program revenues were approximately \$1.8 Million and net income recorded in the Recreation Fund was approximately \$95,000. The Recreation Fund retains its own resources for use in future years. As of the end of FY16, the Recreation Revolving Fund balance, which is the sum total of prior years' successful operations, had a balance of \$861,849.

Concord citizens are generally satisfied with the services the Department provides. In the recent Town Government Survey completed in the fall of 2016, 84% of respondents felt that the price of Recreation Programs was either a "good bargain" or "reasonably priced".

The Department provides child care services for children between the ages of 3 and 11, accounting for approximately \$880,000 in program fees. These services include the Carousel Preschool program at the Harvey Wheeler Center, the Before School program at each elementary school, and the After-School and school-vacation programs at Harvey Wheeler and the Hunt Gym.

Throughout the year, over 6,000 children and adults participate in recreation programs that the Department runs, including youth musical theater, basketball, tennis and skiing programs. The Department also organizes and supports several popular community-wide events, including the Winter Wonderland, Stow Street Block Party and the Minuteman Classic Road Race. In addition to its own programming, the Recreation Department works with other sports organizations in Concord to provide and coordinate the use of time and space on the town's recreational facilities.

## **Minuteman Career and Technical High School**

Concord's current yearly assessment for the regional Minuteman Career and Technical High School budget (**Article 18**) is \$599,179.

Since its formation in 1970, Concord has been a member of the Minuteman Career and Technical High School District. As a member, the Town has benefitted by being able to offer Concord students an alternative to the Concord-Carlisle Regional High School that broadens the students' educational experience to include the development of vocational and technical skills along with academics. State law requires that vocational-technical education be made available to all students, either directly through the municipality's high school or through a regional district such as Minuteman. Vocational-technical education is defined in the law (MGL Chapter 74, §1) as an education program offering courses "designed to educate and prepare students for both employment and continuing academic and occupational preparation."

Minuteman's mission is to collaborate with parents, communities and business leaders to serve a diverse student body with multiple learning styles. Through a challenging, integrated curriculum, students develop the academic, vocational and technical skills necessary to be productive members of a global community. Minuteman promotes lifelong learning that fosters personal and professional development, in a safe and respectful environment. Minuteman has remained committed to preparing all students for success. Minuteman is in urgent need of upgrading its facility.

For a number of years the Minuteman Regional School Committee has been addressing the needs of its existing building in order to meet updated codes and academic suitability, as well as deficiencies in the condition of the building. Working with the Massachusetts School Building Authority (MSBA) plans have been developed and a commitment of roughly \$44 million in state money to help finance the project was made.

Until 2017, the Minuteman Region has had 16 member towns and unanimous approval was required to undertake any building project. A small number of towns were not in agreement with the project and it was also the opinion in several towns that, for a number of reasons, it would be financially advantageous for them if they left the District. Minuteman began a process to amend its Regional Agreement to allow certain member towns to leave the district, thus paving the way for those towns committed to Minuteman to forge ahead with a plan to construct a new facility.

With the towns that were in disagreement with the project freed from direct responsibility for the long term debt to finance it, it was possible in February 2016 for all 16 towns to approve the new Regional Agreement with six towns, comprising 14% of the current in-district enrollment, voting concomitantly to leave the District as of July 1, 2017 (Bolton, Boxborough, Lincoln, Sudbury, Wayland and Weston).

Minuteman then sought approval from all 16 towns to move forward with a new high school. Last year Concord at Town Meeting and a ballot referendum approved debt authorization for the project financing in the form of debt excluded from the property tax levy limit. By district-wide vote in September 2016 the project was approved by simple majority to go forward.

The design capacity of 628 students for the new building and a budget of \$144,922,478 have been approved by the MSBA. They have indicated that the state share can be up to \$44 million. In addition Minuteman is seeking to adjust the tuition formula for students enrolled from out-of-district towns to include a capital cost reimbursement in addition to the operating cost charge.

Concord's share of the debt repayment on approximately \$100 million – the projected local share of the project cost, bonded over 25 to 30 years will vary each year based on future enrollment. It is estimated that the annual debt service cost to Concord would be in the range of \$250,000. This represents about a quarter of one percent

on the tax bill, or about \$28 per year on the current median single family residential property valued at \$798,000.

Final design and planning for the new school is underway with construction to start in July 2017 and move-in planned for summer 2020.

The total FY18 Budget for the District is \$19,449,466, a decrease of \$278,631 (1.41%). However, the Total Budget Assessment to the towns is \$11,551,483, which is an increase of \$607,744 (5.55%) due to several factors. These include a decline of \$150,344 in Chapter 70 State Aid due to the smaller 10 member district (depends on final state budget probably June 2017). There will also be a decline in revenue from Out-of-District tuitions due to a planned decline in Out-of District enrollment to match enrollment to the capacity of new building. Total enrollment has declined from a high of 796 in 2013 to 586 as of October 2016. The plan is to reach a target enrollment of 628 students in 3 to 5 years.

With fewer towns sharing the responsibility for funding the budget, each town's share will increase somewhat. Concord's Assessment share will increase by 22.2% to \$599,179 (Article 18) from \$490,276 last year. In addition to sharing the assessment with fewer towns, Concord's enrollment has been increasing to 19 students as of October 2016.

The FY18 Budget Guidelines include expenditures to maintain a safe, secure, and effective learning environment in the current building, implementation toward Academy model of organization, adjusting staffing to align with smaller school by reducing 3.0 FTE (1.5 Admin, 1.5 Teaching), reconfiguring bus transportation system, implementing a 3-year plan for equipment purchases, funding for 1 year debt service, and maintaining contributions to OPEB and Stabilization. There are several cost drivers. Vocational/technical education costs exceed those of traditional education because of additional coursework and support. In addition, approximately 45-50% of students at Minuteman participate in Special Education programs and are receiving services via an Individual Education Plan (IEP). Naturally, the total annual budget has declined along with the planned decline in enrollment since 2013.

# Article 2

## Consent Calendar

Ms. Miller moves: that the 2017 Annual Town Meeting advance for consideration Articles 3, 4, 5, 6, 8, 9, 10, 11, 22, 27, 31, 32, 33, 35, 37, 38, 44, 45, 47, 53, 54, 55 and 56, and take action on such Articles without debate on any of such Articles, provided, that upon the request of five voters at this Meeting, made before the vote is taken on this motion, an Article shall be dropped from the Consent Calendar and shall be acted upon in the ordinary course of business at this Town Meeting.

### Article 3 MEETING PROCEDURE

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 3 as printed in the handout applicable to the Article.

**Reason:** Routine and noncontroversial; the motion will be identical to a motion passed annually and unanimously for more than fifteen years.

### Article 4 RATIFY PERSONNEL BOARD CLASSIFICATION ACTIONS

**Affirmative Action Recommended by:** Finance Committee, Select Board and Personnel Board

**Motion:** That the Town take affirmative action on Article 4 as printed in the Warrant.

**Reason:** Routine and noncontroversial.

### Article 5: CLASSIFICATION & COMPENSATION PLAN FOR REGULAR-STATUS POSITIONS

**Affirmative Action Recommended by:** Finance Committee, Select Board and Personnel Board

**Motion:** That the Town take affirmative action on Article 6 as printed in the Warrant.

**Reason:** Routine; noncontroversial at hearing

### Article 6: PERSONNEL BYLAW AMENDMENT

**Affirmative Action Recommended by:** Finance Committee, Select Board, and Personnel Board

**Motion:** That the Town take affirmative action on Article 5 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Provides for handling of employee personal leave by policy instead of bylaw in order to facilitate more efficient management.

### Article 8: MUNICIPAL BUILDING RENOVATIONS

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 8 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(1) of the Massachusetts General Laws.

**Reason:** Noncontroversial at hearing, part of the Town Manager's five-year capital plan. Funding for municipal office renovations, including ADA compliance and green initiatives.

### Article 9: PUBLIC SAFETY COMMUNICATIONS EQUIPMENT

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 9 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(1) of the Massachusetts General Laws.

**Reason:** Noncontroversial at hearing, part of the Town Manager's five-year capital plan. Funding for replacement of police department communication equipment.

### Article 10: FIRE ENGINE #8 REPLACEMENT

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 10 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(1) of the Massachusetts General Laws.

**Reason:** Noncontroversial at hearing; part of the Town Manager’s five-year capital plan. Funding for replacement of 1998 pumper, scheduled for replacement this year.

Article 11: AMBULANCE #1 REPLACEMENT

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 11 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(1) of the Massachusetts General Laws.

**Reason:** Noncontroversial at hearing; part of the Town Manager’s five-year capital plan. Funding for replacement of ambulance with corrosion and suspension problems.

Article 22: PEG ACCESS AND CABLE-RELATED FUND

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 22 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Financial housekeeping: year three payment under a 10-year agreement, as approved at 2015 Annual Town Meeting

Article 27: COMPREHENSIVE MUNICIPAL FACILITY NEEDS STUDY

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 27 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(7) of the Massachusetts General Laws.

**Reason:** Noncontroversial at hearing. Funding for evaluation of existing Town facilities to facilitate planning for future needs.

Article 31: BRUCE FREEMAN RAIL TRAIL – GRANT OF EASEMENT TO MBTA

**Affirmative Action Recommended by:** Select Board

**Motion:** That the Town take affirmative action on Article 31 as printed in the Warrant.

**Reason:** Noncontroversial at hearing; Companion transaction to replace parking eliminated by earlier easement granted to the Town by MBTA for BFRT crossing at West Concord Depot

Article 32: ACCEPT EASEMENTS-BROOKSIDE SQUARE DEVELOPMENT

**Affirmative Action Recommended by:** Select Board

**Motion:** That the Town take affirmative action on Article 32 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Completes commitments previously made to Planning Board by developer of Brookside Square

Article 33: GRANT OF EASEMENT TO W.R. GRACE

**Affirmative Action Recommended by:** Select Board

**Motion:** That the Town take affirmative action on Article 33 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Allows W.R. Grace access to 214Y Main Street, Concord, MA for purpose of performing work required under U.S. EPA and MassDEP order for duration that work is required.

Article 35: ZONING BYLAW AMMENDMENT – SITE PLAN REVIEW FOR RELIGIOUS UUSES, EDUCATIONAL USES AND CHILD CARE FACILITIES

**Affirmative Action Recommended by:** Planning Board, Select Board

**Motion:** That the Town take affirmative action on Article 35 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Housekeeping item to correct administrative error regarding article approved by 2016 Annual Town Meeting.

Article 37: ZONING BYLAW AMENDMENT – NONCONFORMING SINGLE AND TWO FAMILY RESIDENTIAL STRUCTURES

**Affirmative Action Recommended by:** Planning Board, Select Board

**Motion:** That the town take affirmative action on Article 37 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Removes inconsistencies in measurement methodologies from Zoning Bylaw.

Article 38: ZONING BYLAW AMENDMENT – RESIDENTIAL USES

**Affirmative Action Recommended by:** Planning Board, Select Board

**Motion:** That the Town take affirmative action on Article 38 as printed in the Warrant.

**Reason:** Noncontroversial at hearing. Housekeeping item to correct administrative error regarding article approved by 2016 Annual Town Meeting; also removes inconsistencies in measurement technologies from Zoning Bylaw.

Article 44: REGIONAL HOUSING SERVICES REVOLVING FUND EXPENDITURES

**Affirmative Action Recommended by:** Finance Committee, Select Board

**Motion:** That the Town take affirmative action on Article 44 as printed in the Warrant, in the amount of \$235,000.

**Reason:** Noncontroversial at hearing. Creates a funding mechanism for Concord to take a three-year turn as lead community for seven-town consortium started in 2011.

Article 45: ROAD REPAIR REVOLVING FUND EXPENDITURES

**Affirmative Action Recommended by:** Finance Committee, Select Board, and Public Works Commission.

**Motion:** That the Town take affirmative action on Article 45 as printed in the Warrant, in the amount of \$120,000.

**Reason:** Routine and noncontroversial (revolving fund, voted last eight years on consent calendar).

Article 47: 2017 ROADS AND PARKING LOTS PROGRAM

**Affirmative Action Recommended by:** Finance Committee, Select Board and Public Works Commission

**Motion:** That the Town take affirmative action on Article 47 as printed in the Warrant, in the amounts stated in the warrant, from borrowing under the provisions of Chapter 44, Section 7(1) of the Massachusetts General Laws.

**Reason:** Routine annual approval. Noncontroversial at hearing; part of the Town Manager's five-year capital plan Voted unanimously annually multiple years.

Article 53: LIGHT PLANT EXPENDITURES & LIGHT PLANT PAYMENT IN LIEU OF TAXES

**Affirmative Action Recommended by:** Finance Committee, Select Board and Light Board

**Motion:** That the Town take affirmative action on Article 53 as printed in the Warrant, with a transfer in the sum of \$474,000.

**Reason:** Routine and noncontroversial (voted in previous years on consent calendar).

Article 54: SOLID WASTE DISPOSAL FUND EXPENDITURES

**Affirmative Action Recommended by:** Finance Committee, Select Board and Public Works Commission

**Motion:** That the Town take affirmative action on Article 54 as printed in the Warrant.

**Reason:** Routine and noncontroversial (enterprise fund, voted last nine years on consent calendar).

Article 55: SEWER SYSTEM EXPENDITURES

**Affirmative Action Recommended by:** Finance Committee, Select Board and Public Works Commission

**Motion:** That the town take affirmative action on Article 55 as printed as in the Warrant.

**Reason:** Routine and noncontroversial (enterprise fund, voted last nine years on the consent calendar).

Article 56: SEWER IMPROVEMENT FUND EXPENDITURES

**Affirmative Action Recommended by:** Finance Committee, Select Board and Public Works Commission

**Motion:** That the Town take affirmative action on Article 56 as printed in the Warrant.

**Reason:** Routine and noncontroversial (enterprise fund, voted last nine years on consent calendar).

**THE COMMONWEALTH OF MASSACHUSETTS  
WARRANT FOR THE ANNUAL TOWN MEETING 2017**

Middlesex, ss.

To any of the Constables of the Town of Concord, in said County, Greetings:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify the legal voters of said Town of Concord, qualified to vote at Town Meeting for the transaction of Town affairs, to meet at 7:00 am on Tuesday, the twenty-eighth day of March next, as follows, all in said Concord:

Those residing in Precinct 1 – at the Dept. of Planning & Land Management, 141 Keyes Road;

Those residing in Precincts 2 and 3 – at the Harvey Wheeler Community Center, 1276 Main Street;

Those residing in Precinct 4 – at the Ripley School Building, 120 Meriam Road;

Those residing in Precinct 5 – at the Hunt Gymnasium, 90 Stow Street;

By posting a printed copy of this Warrant, by you attested, at the Town House and in at least one public location in each precinct in Concord, at least seven days before the 28<sup>th</sup> day of March, then and there to act on the following articles:

**ARTICLE 1.** To bring their votes on one ballot for the following Town Officers:

One for Moderator	for one year
One for Board of Selectmen	for three years
One for School Committee	for three years
One for Housing Authority	for five years

You are further required in the name of the Commonwealth of Massachusetts to notify the legal voters of said Town of Concord, as aforesaid, to meet at the Concord-Carlisle Regional High School at 500 Walden Street, in said town, on Monday, the twenty-fourth day of April 2017, at 7:00 pm in the evening, then and there to act upon the following Articles:

**CHOOSE TOWN OFFICERS**

**ARTICLE 1.** To choose all necessary Town Officers and Committees.

**HEAR REPORTS**

**ARTICLE 2.** To hear and act upon the reports of Town Officers and Committees.

**MEETING PROCEDURE**

**ARTICLE 3.** To determine whether the Town will adopt a rule of the meeting governing requirements on Motions and amendments to Motions made at this meeting under Articles concerned with expenditures, in order to assure compliance with the requirements of Chapter 59, Section 21C of the Massachusetts General Laws (generally referred to as "Proposition 2½"), or take any other action relative thereto.

<i>The motion to be made by the Finance Committee will specify that every motion to appropriate funds will be required to identify the source of funding. Town Meeting has adopted this meeting procedure for a number of years.</i>
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**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**RATIFY PERSONNEL BOARD CLASSIFICATION ACTIONS**

**ARTICLE 4.** To determine whether the Town will vote to ratify the Personnel Board's actions to amend the Classification and Compensation Plan as follows, or take any other action relative thereto:

1. Add the title "Beede General Manager" to Grade MP-4 effective May 17, 2016.
2. Add the title "Assistant Highway & Grounds Superintendent" to Grade MP-4 effective August 30, 2016.
3. Delete the title "Budget & Purchasing Administrator" from Grade MP-4 and replace it by adding "Budget & Purchasing Director" to Grade MP-5 effective August 30, 2016.
4. Add the title "Assistant Assessor" to Grade MP-3 effective August 30, 2016.
5. Add the title "Energy Specialist" to Grade MP-2 effective August 30, 2016.
6. Add the title "Customer Services Representative" to Grade AC-3 effective August 30, 2016.
7. Make all other changes to the Classification and Compensation Plan voted by the Personnel Board between January 3, 2017 and April 24, 2017.

*The Town Manager has authority to create and modify positions throughout the fiscal year; titles and salary ranges are determined using the Town's established classification system. Under the Personnel Bylaw, the Personnel Board is authorized to approve temporary changes in the Classification and Compensation Plans, pending ratification of such actions at the next Town Meeting. Actions already taken appear in the Warrant; if additional actions are taken by the Personnel Board after the close of the Warrant, notice will be filed with the Town Clerk and details will be presented at Town Meeting.*

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**CLASSIFICATION & COMPENSATION PLAN FOR REGULAR-STATUS POSITIONS**

**ARTICLE 5.** To determine whether the Town will vote to amend the Classification and Compensation Plan for regular-status Town positions by adopting the following schedules to become effective July 1, 2017, or take any other action relative thereto:

CLASSIFICATION AND COMPENSATION PLAN  
Effective July 1, 2017

**ADMINISTRATIVE-CLERICAL**

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>AC-1</b>	Hourly	16.55	19.90	23.25
Receptionist/Clerk Recreation Clerk				
<b>AC-2</b>	Hourly	18.48	22.22	25.96
Account Clerk Department Clerk Senior Recreation Clerk Utility Account Clerk				
<b>AC-3</b>	Hourly	20.96	25.20	29.44
Customer Services Representative Senior Account Clerk				

Senior Department Clerk

<b>AC-4</b>	<b>Hourly</b>	<b>22.64</b>	<b>27.22</b>	<b>31.80</b>
Administrative Assistant Collections Assistant Retirement Assistant Treasury Assistant				

<b>AC-5</b>	<b>Hourly</b>	<b>24.20</b>	<b>29.09</b>	<b>33.98</b>
Assistant Town Clerk Human Resources Assistant Senior Administrative Assistant				

<b>AC-6</b>	<b>Hourly</b>	<b>25.03</b>	<b>30.10</b>	<b>35.17</b>
Finance Assistant				

<b>AC-7</b>	<b>Hourly</b>	<b>27.66</b>	<b>33.26</b>	<b>38.86</b>
Executive Assistant to the Town Manager				

## TRADES-CRAFTS-LABOR

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>TCL-1</b>	<b>Hourly</b>	<b>16.33</b>	<b>19.74</b>	<b>23.15</b>
Building Custodian				
<b>TCL-2</b>	<b>Hourly</b>	<b>18.45</b>	<b>22.30</b>	<b>26.15</b>
Building Maintenance Custodian				
<b>TCL-3</b>	<b>Hourly</b>	<b>20.30</b>	<b>24.54</b>	<b>28.78</b>
Facilities Maintainer Water/Sewer System Maintainer				
<b>TCL-4</b>	<b>Hourly</b>	<b>22.71</b>	<b>27.48</b>	<b>32.24</b>
Equipment/Line Operator				
<b>TCL-5</b>	<b>Hourly</b>	<b>25.15</b>	<b>30.41</b>	<b>35.67</b>
Assistant Public Works Supervisor Crew Leader Senior Master Mechanic Treatment Systems Operator				
<b>TCL-6</b>	<b>Hourly</b>	<b>28.25</b>	<b>34.17</b>	<b>40.08</b>
Senior Treatment Systems Operator				
<b>TCL-7</b>	<b>Hourly</b>	<b>31.34</b>	<b>37.91</b>	<b>44.47</b>
Public Works Supervisor				

## MANAGERIAL-PROFESSIONAL

*Annual rates are controlling and are based on 52.2 weeks at 40 base hours per week;  
compensation will be prorated for part-time schedules.*

Grade Number & Class Title	Minimum	Mid-Point	Maximum	
<b>MP-1</b>	<b>Annual</b>	<b>44,962</b>	<b>56,393</b>	<b>67,823</b>
Associate Engineer				
Engineering Technician				
Public Information Officer				
Recreation Supervisor				
<b>MP-2</b>	<b>Annual</b>	<b>50,740</b>	<b>63,638</b>	<b>76,536</b>
Administrative & Special Projects Coordinator				
Assistant Local Inspector				
Assistant Natural Resources Director				
Budget Analyst				
Energy Specialist				
Environmental Health Inspector				
Environmental & Regulatory Coordinator				
Field Lister				
GIS Technician/Analyst				
Information Systems Technician				
Office Accountant				
Public Health Inspector				
Senior Engineering Technician				
Senior Services Programs Supervisor				
Telecommunications Network Technician				
Utility Software Coordinator				
Water Conservation Coordinator				
<b>MP-3</b>	<b>Annual</b>	<b>59,870</b>	<b>75,092</b>	<b>90,313</b>
Assistant Assessor				
Assistant Human Resources Director				
Assistant Public Health Director				
Assistant Public Works Engineer				
Assistant to the Water/Sewer Superintendent				
Assistant Town Accountant				
Assistant Treasurer				
Childcare Services Manager				
Civil Engineer				
Customer Service Administrator				
Energy Conservation Coordinator				
Facilities Maintenance Supervisor				
Local Inspector				
Management Analyst				
Recreation Programs & Events Manager				
Retirement System Administrator				
Senior Budget & Operations Analyst				
Senior Environmental & Regulatory Coordinator				
Senior Information Systems Technician				
Senior Planner				

<b>MP-4</b>	<b>Annual</b>	<b>64,007</b>	<b>80,280</b>	<b>96,552</b>
Assistant Highway & Ground Superintendent				
Assistant Recreation Director				
Environmental Services Program Administrator				
Financial Administrator				
GIS & Application Integration Program Manager				
Operations Engineer				
Public Works Engineer				
Senior Services Director				
Telecommunications Coordinator				
<b>MP-5</b>	<b>Annual</b>	<b>68,849</b>	<b>86,351</b>	<b>103,853</b>
Assistant Library Director				
Assistant Town Engineer				
Budget & Purchasing Director				
Deputy Treasurer/Collector				
Facilities Manager				
Highway & Grounds Superintendent				
Natural Resources Director				
Police Lieutenant				
Public Health Director				
Town Clerk				
Town Planner				
<b>MP-6</b>	<b>Annual</b>	<b>75,873</b>	<b>95,161</b>	<b>114,448</b>
Assistant Fire Chief				
Building Commissioner				
Police Captain				
Recreation Director				
Town Accountant				
Town Assessor				
Town Engineer				
Water/Sewer Superintendent				
<b>MP-7</b>	<b>Annual</b>	<b>86,879</b>	<b>108,965</b>	<b>131,051</b>
Assistant Town Manager				
Director of Planning & Land Management				
Human Resources Director				
Library Director				
<b>MP-8</b>	<b>Annual</b>	<b>96,792</b>	<b>121,399</b>	<b>146,005</b>
Chief Information Officer				
Fire Chief				
Police Chief				
Public Works Director				
<b>MP-9</b>	<b>Annual</b>	<b>106,079</b>	<b>133,049</b>	<b>160,018</b>
Finance Director				

## ELECTRICAL LABOR

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>EL-1</b>	Hourly	18.00	21.77	25.54
<b>EL-2</b>	Hourly	22.85	27.63	32.41
Lineworker, Grade 3 Meter Technician				
<b>EL-3</b>	Hourly	28.99	32.77	36.55
Lineworker, Grade 2 Utility Electrician				
<b>EL-4</b>	Hourly	35.99	40.70	45.40
Lineworker, Grade 1				
<b>EL-5</b>	Hourly	37.69	42.61	47.53
Lead Lineworker				
<b>EL-6</b>	Hourly	40.59	45.89	51.19
Line Supervisor				

## ELECTRICAL MANAGEMENT

*Annual rates are controlling and are based on 52.2 weeks at 40 base hours per week;  
compensation will be prorated for part-time schedules.*

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>EM-1</b>	Annual	61,287	73,681	86,074
Meter Supervisor				
<b>EM-2</b>	Annual	77,728	93,444	109,160
Electrical Engineer				
<b>EM-3</b>	Annual	92,458	111,153	129,847
Assistant CMLP Director Power Supply & Rates Administrator				
<b>EM-4</b>	Annual	113,103	135,971	158,839
CMLP Director				

## SWIM & FITNESS

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>SF-1</b>	Hourly	11.00	35.50	60.00
Swim/Fitness Specialist				

## HUMAN SERVICES

Grade Number & Class Title		Minimum	Mid-Point	Maximum
<b>HS-A</b>	Hourly	11.00	18.00	25.00
Human Services Assistant				
<b>HS-1</b>	Hourly	15.25	25.13	35.00
Human Services Specialist				
<b>HS-2</b>	Hourly	15.25	28.63	42.00
Child Care/Education Specialist				

*With annual adjustments and periodic comprehensive reviews, the Classification & Compensation Plan keeps Town salaries competitive in the employment market, maintains internal equity of salary ranges, maintains comparability with salaries of unionized employees, and keeps pace with changes in the cost of living. This article does not control the amount of the actual salary increases to be received by employees in FY18. The Town Manager and Personnel Board set actual salary increase amounts after Town Meeting, based upon the approved budget.*

Finance Committee recommends affirmative action.  
 Select Board recommends affirmative action.

**PERSONNEL BYLAW AMENDMENT**

**ARTICLE 6.** To determine whether the Town will vote to amend Section 15 of the Personnel Bylaw as follows,

*Delete all text and replace with the following:*

“Each regular employee may be granted up to three (3) days of paid personal leave during each fiscal year; personal leave for regular part-time employees shall be pro-rated. Personal leave may be used by the employee for any personal reason; however, the scheduling of such leave must be approved by the appropriate department head. Any unused personal leave shall be forfeited upon separation of employment. Town Personnel Policies and Procedures may provide further definition of the accrual and use of personal leave.”

or take any other action relative thereto.

Section 15 currently reads as follows:

Section 15. PERSONAL LEAVE

Each regular employee shall be granted three (3) days of paid personal leave during each fiscal year.

Personal leave may be used by the employee for any personal reason; however, the scheduling of such leave must be approved by the appropriate department head.

No personal leave may be taken until an employee has completed three (3) months of service, unless authorized in advance by the town manager. (rev. 5/01)

Regular part-time employees are entitled to personal leave pro-rated to their weekly schedules.

Personal leave must be used in the fiscal year earned. Any unused personal leave shall be forfeited at the end of each fiscal year and upon termination or retirement. In the event a terminating employee has used more personal time during the current fiscal year than earned, the excess used will be charged against accrued vacation or deducted from final pay as necessary. (rev. 5/93)

Town Personnel Policies and Procedures may provide further definition of the accrual and use of personal leave.

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***The proposed amendment will provide the Town Manager and Personnel Board with increased flexibility related to setting policies for the accrual and use of personal leave, while maintaining the limit of three days per fiscal year per employee. This change will provide for more efficient and effective administration of non-union personnel matters.***

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**TOWN BUDGET**

**ARTICLE 7.** To determine whether the Town will vote to raise and appropriate the sum of \$40,943,520, or any other sum, for the following necessary and expedient purposes of the Town for the fiscal year ending June 30, 2018:

<b><u>General Fund Operating Budget</u></b>				
<b>Item No.</b>	<b>Department</b>	<b>Fiscal 2016 Expenses</b>	<b>Fiscal 2017 Appropriation</b>	<b>Fiscal 2018 Proposal</b>
<b>General Government</b> <b>\$2,885,019 is 7.0% of Total</b>				
1	Town Manager's Office			
	A. Town Manager	\$ 376,107	\$ 385,112	\$ 384,873
	B. Human Resources	226,464	236,342	250,054
	C. Facilities Management	224,962	238,348	290,000
	D. Resource Sustainability Fund	75,000	118,433	126,000
	E. Visitor's Center and Restroom	26,974	32,635	44,028
	F. 37 Knox Trail	-	8,334	17,762
	<b>Subtotal</b>	<b>929,507</b>	<b>1,019,204</b>	<b>1,112,717</b>
2	Legal Services	178,151	225,000	225,000
3	Elections and Registrars			
	A. Elections	52,164	34,815	13,627
	B. Registrars	8,103	7,967	8,476
	<b>Subtotal</b>	<b>60,267</b>	<b>42,782</b>	<b>22,103</b>
4	Town Meeting and Reports	64,266	44,900	44,900
5	Planning			
	A. Planning Administration	444,821	478,856	386,153
	B. Natural Resources	209,978	235,177	221,810
	C. Inspections	465,384	472,221	486,187
	D. Health	293,820	306,900	315,122
	<b>Subtotal</b>	<b>1,414,003</b>	<b>1,493,154</b>	<b>1,409,272</b>
6	141 Keyes Road	70,470	70,654	71,027
	<b>Total General Government</b>	<b>\$ 2,716,664</b>	<b>\$ 2,895,694</b>	<b>\$ 2,885,019</b>
<b>Finance and Administration</b> <b>\$2,453,175 is 6.0% of Total</b>				
7	Finance Committee	2,151	3,410	3,410
8	Finance			
	A. Finance Administration	296,630	304,171	291,073
	B. Treasurer-Collector	279,429	291,656	294,275
	C. Town Accountant	154,562	164,927	163,319
	D. Assessors	408,237	423,561	422,176
	E. Town Clerk	238,590	246,744	247,958
	<b>Subtotal</b>	<b>1,377,449</b>	<b>1,431,059</b>	<b>1,418,801</b>
9	Information Systems	681,610	790,818	921,919
10	Town House	104,232	108,512	109,045
	<b>Total Finance and Administration</b>	<b>\$ 2,165,441</b>	<b>\$ 2,333,799</b>	<b>\$ 2,453,175</b>

Item No.	Department	Fiscal 2016 Expenses	Fiscal 2017 Appropriation	Fiscal 2018 Proposal
<b>Public Safety</b> <b>\$9,307,692 is 22.7% of Total</b>				
11	Police Department	4,356,428	4,453,109	4,468,879
12	Fire Department	4,237,885	4,443,659	4,471,397
13	West Concord Fire Station	57,630	40,289	39,664
14	Police-Fire Station	234,792	275,011	284,816
15	Emergency Management	22,647	15,077	16,937
16	Animal Control Officer	23,464	26,000	26,000
	<b>Total Public Safety</b>	<b>\$ 8,932,846</b>	<b>\$ 9,253,145</b>	<b>\$ 9,307,692</b>
<b>Public Works and Facilities</b> <b>\$4,265,349 is 10.4% of Total</b>				
17	Public Works			
	A. CPW Administration	179,683	195,289	195,728
	B. Engineering	384,645	395,323	393,000
	C. Highway Maintenance	1,284,438	1,406,326	1,404,032
	D. Parks and Trees	639,130	668,270	698,573
	E. Cemetery	57,269	69,916	66,679
	<b>Subtotal</b>	<b>2,545,165</b>	<b>2,735,125</b>	<b>2,758,011</b>
18	Snow and Ice Removal	473,604	597,500	610,000
19	Street Lighting	65,249	73,463	73,463
20	CPW Equipment	250,000	300,000	325,000
21	Drainage Program	205,000	205,000	205,000
22	Sidewalk Management	100,000	100,000	110,000
23	Road Improvements	90,000	90,000	100,000
24	133/135 Keyes Road	101,134	102,263	83,875
	<b>Total Public Works and Facilities</b>	<b>\$ 3,830,152</b>	<b>\$ 4,203,351</b>	<b>\$ 4,265,349</b>
<b>Human Services</b> <b>\$3,018,855 is 7.4% of Total</b>				
25	Library	1,953,234	2,136,945	2,142,218
26	A. Human Services	6,845	27,394	38,353
	B. Senior Services	334,848	351,197	383,149
	C. Recreation Services	49,391	74,032	75,245
27	Harvey Wheeler Community Ctr.	115,300	120,452	125,521
28	Hunt Recreation Ctr.	96,644	105,574	109,831
29	Veterans	86,763	69,990	125,310
30	Ceremonies and Celebrations	20,391	24,376	19,228
	<b>Total Human Services</b>	<b>\$ 2,663,415</b>	<b>\$ 2,909,960</b>	<b>\$ 3,018,855</b>

Item No.	Department	Fiscal 2016 Expenses	Fiscal 2017 Appropriation	Fiscal 2018 Proposal
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<b>Unclassified</b>				
<b>\$1,133,923 is 2.8% of Total</b>				
31	Town Employee Benefits			
	A. Unused Sick Leave	90,000	90,000	90,000
	B. Public Safety Disability	157	2,500	2,500
	C. Employee Assistance Program	7,177	7,500	7,500
	<b>Subtotal</b>	<b>97,334</b>	<b>100,000</b>	<b>100,000</b>
32	Reserve Fund*	-	225,000	225,000
*Transfers totaling \$36,500 were made to other accounts in Fiscal Year 2016.				
33	Salary Reserve**		28,065	793,923
**Transfers totaling \$553,957 in Fiscal Year 2016 and \$536,594 (to date) in Fiscal Year 2017 were made to other accounts.				
34	Land Fund	10,000	15,000	15,000
	<b>Total Unclassified</b>	<b>\$ 107,334</b>	<b>\$ 368,065</b>	<b>\$ 1,133,923</b>
<b>TOWN GOVERNMENT SUBTOTAL (1 – 34 )</b>		<b>\$ 20,415,852</b>	<b>\$ 21,964,013</b>	<b>\$ 23,064,013</b>
<b>Joint (Town - CPS)</b>				
<b>\$17,879,507 is 43.7% of Total</b>				
35	Insurance			
	A. Group Insurance	4,650,000	4,650,000	4,800,000
	B. OPEB	1,150,000	1,400,000	1,470,000
	C. Property/Liability	225,000	250,000	250,000
	<b>Subtotal</b>	<b>6,025,000</b>	<b>6,300,000</b>	<b>6,520,000</b>
36	Unemployment/Workers' Comp.			
	A. Unemployment Comp.	131,536	100,000	100,000
	B. Workers' Comp.	53,495	100,000	100,000
	<b>Subtotal</b>	<b>185,031</b>	<b>200,000</b>	<b>200,000</b>
37	Retirement	3,220,000	3,317,000	3,667,000
38	Social Security and Medicare	708,552	765,000	810,000
39	Debt Service			
	A. Long-Term Debt			
	Town Principal and Interest	2,551,988	2,751,725	3,015,800
	CPS Principal and Interest	940,113	883,375	700,350
	<b>Subtotal</b>	<b>3,492,100</b>	<b>3,635,100</b>	<b>3,716,150</b>
	Interest on Notes	-	54,900	135,000
	Other Debt Expense	2,917	40,000	8,850
	<b>Subtotal Within Levy Limit</b>	<b>3,495,017</b>	<b>3,730,000</b>	<b>3,860,000</b>
	B. Excluded Debt			
	Town Principal and Interest	203,488	101,089	99,794
	CPS Principal and Interest	2,501,376	3,906,739	3,507,713
	Less: Use of Stabilization Funds	(1,500,000)	(1,000,000)	(785,000)
	<b>Subtotal Excluded Debt</b>	<b>1,204,865</b>	<b>3,007,828</b>	<b>2,822,507</b>
	<b>Total Debt Service</b>	<b>4,699,882</b>	<b>6,737,828</b>	<b>6,682,507</b>
	<b>Total Joint (Town - CPS)</b>	<b>\$ 14,838,465</b>	<b>\$ 17,319,828</b>	<b>\$ 17,879,507</b>
<b>TOTAL APPROPRIATION (1 – 39)</b>		<b>\$ 35,254,317</b>	<b>\$ 39,283,841</b>	<b>\$ 40,943,520</b>

And further, that the Town Manager is authorized to turn in or sell at public auction any surplus equipment, with the amount allowed or received therefore to be applied against the purchase of new equipment; and

That the sum of \$11,000, State Aid to Libraries, be transferred to the use of the Library Committee for the purchase of books, periodicals, and subscriptions; and

That the Town appropriate and transfer the sum of \$750 from the Dog Inoculation Fees Reserve Account for the cost of the Board of Health's rabies clinic; and

That the appropriation for Salary Reserve under Line Item 33 shall be transferred by the Town Manager to the various salary line items in accordance with salary levels established at July 1, 2017 and thereafter pursuant to the salary schedules adopted under Article 5, the implementation of the merit pay plan in accordance with Section 10.2 (2) of the Personnel Bylaws, and collective bargaining agreements. Any such transfer shall be reported periodically by the Town Manager to the Select Board and the Finance Committee, and a final report shall be issued when all such transfers have been completed for the fiscal year; and

That the Town authorize the following sums to be expended from the Title 5 Septic Loan Betterment Reserve Account to meet the loan payments to the Massachusetts Clean Water Trust due and payable during FY2018:

<u>Amount</u>	<u>Loan Number</u>	<u>Original Loan</u>	<u>Date of Issue</u>	<u>Final Maturity</u>	<u>Town Authorization</u>
\$ 10,828.73	T5-97-1070	\$ 200,000	12/22/99	FY21	Art. 46 (1997)
\$ 70,317.00	T5-05-1243	\$ 703,170	03/18/09	FY19	Art. 50 (2004)
\$ 29,660.00	T5-05-1243-A	\$ 296,830	06/13/12	FY23	Art. 50 (2004)
\$ 32,472.00	T5-05-1243-B	\$ 324,715	05/22/13	FY23	Art. 42 (2009)
\$ 19,745.70	T5-05-1243-C	\$ 197,457	01/07/15	FY25	Art. 42 (2009)

And, that the Town appropriate the sum of \$785,000 from the High School Debt Stabilization Fund, to be expended under the direction of the Town Manager, to pay a portion of Concord's share of debt service excluded from the property tax levy limit due and payable during fiscal year 2018, and that said appropriation shall be in addition to the sum contained in Line Item 39 herein, or take any other action relative thereto.

*The Town budget article provides for all General Fund (tax-supported) Town operations and activities organized by Town Charter under the direction of the Town Manager. The total appropriation to be presented for Town Meeting approval meets the spending guideline set by the Finance Committee in November 2016.*

*The text above also makes certain other appropriations from stabilization funds, authorizes certain other transfers between appropriation accounts, and appropriates Title 5 septic loan payments.*

**Finance Committee recommends affirmative action in the amount of \$40,943,520.**

**Select Board recommends affirmative action in the amount of \$40,943,520.**

### **MUNICIPAL BUILDING RENOVATIONS**

**ARTICLE 8.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$350,000, or any other sum, for remodeling, reconstructing or making extraordinary repairs to municipal buildings, said funds to be expended under the direction of the Town Manager, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$350,000 to be used to repair various town buildings. Included in this appropriation are funds necessary to re-wire the 141 Keyes Road property for improved telecommunications. This borrowing is part of the Town Manager's Five-Year Capital Plan with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$350,000.  
Select Board recommends affirmative action in the amount of \$350,000.**

### **PUBLIC SAFETY COMMUNICATIONS EQUIPMENT**

**ARTICLE 9.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$225,000, or any other sum, for the purchase of public safety communications equipment, said funds to be expended under the direction of the Town Manager, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$225,000 to replace portable and mobile radios and related equipment to be used by the Police Department. This borrowing is part of the Town Manager's Five-Year Capital Plan, with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$225,000.  
Select Board recommends affirmative action in the amount of \$225,000.**

### **FIRE ENGINE #8 REPLACEMENT**

**ARTICLE 10.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$575,000, or any other sum, for the purchase of a new Fire Pumper Truck and any necessary related equipment, said funds to be expended under the direction of the Town Manager, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$575,000 to replace Engine 8, a 1998 pumper. It is the practice of the Fire Department to purchase high quality, durable, good value apparatus without expensive customizable upgrades. This borrowing is part of the Town Manager's Five-Year Capital Plan, with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$575,000.  
Select Board recommends affirmative action in the amount of \$575,000.**

### **AMBULANCE #1 REPLACEMENT**

**ARTICLE 11.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the Treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$260,000, or any other sum, for the purchase of a new ambulance for the Fire Department, and any necessary related equipment, said funds to be expended under the direction of the Town Manager, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment

of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$260,000 to replace Ambulance 1, a 2008 ambulance. This borrowing is part of the Town Manager's Five-Year Capital Plan, with the debt service cost to be funded within the levy limit.*

Finance Committee recommends affirmative action in the amount of \$260,000.  
Select Board recommends affirmative action in the amount of \$260,000.

#### **BYLAW REGARDING LEASING OF TOWN LAND BY SELECT BOARD AND TOWN MANAGER**

**ARTICLE 12.** To determine whether the Town will vote to amend the Town Bylaws by adding a Bylaw authorizing the Town Manager, subject to the approval of the Select Board, to enter into lease or license agreements for the use of Town-owned land for a term of up to ten years, as follows, or take any other action relative thereto.

##### **General Bylaw: Leasing of Land by Select Board and Town Manager**

- A. The Town Manager is authorized to solicit, award and enter into lease or license agreements for the use of land owned by the Town for a period of up to ten (10) years, inclusive of any renewal, extension or option provision, subject to approval by the Select Board, but without the necessity for further authorization by Town Meeting.
- B. Nothing herein shall be construed to limit the Town's, the Town Manager's, or the Select Board's authority to solicit, award and enter into such a lease or license agreement for a longer term pursuant to any applicable law, including, without limitation: (1) G.L. c. 40, § 3, authorizing the Select Board authority to enter into leases for the use of municipal buildings for a period of up to thirty (30) years; (2) Chapter 331 of the Acts of 1981 permitting Town Meeting to authorize leases of public buildings and lands for a period of up to forty (40) years; and (3) any action by Town Meeting authorizing the Town Manager or the Select Board to enter into a specific lease or license, or category of leases or licenses.

*This article would authorize the Town Manager, subject to the Select Board's approval, to enter into leases of up to ten years for municipal land. Currently, the Select Board may enter into leases for municipal buildings for a period of up to thirty years, but neither the Town Manager nor the Select Board can enter into long-term leases of any kind for municipal land without prior Town Meeting approval.*

Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.

#### **CONCORD PUBLIC SCHOOLS BUDGET**

**ARTICLE 13.** To determine whether the Town will vote to raise and appropriate the sum of \$37,046,694, or any other sum, for the following necessary and expedient purposes of the public schools of the Town for the fiscal year ending June 30, 2018, or take any other action relative thereto:

<b>SCHEDULE A - PUBLIC SCHOOL BUDGET</b>				
	<b>Department</b>	<b>Fiscal 2016 Adopted</b>	<b>Fiscal 2017 Adopted</b>	<b>Fiscal 2018 School Committee Vote of Dec. 20, 2016</b>
1	Concord Public Schools Budget/Appropriation	\$34,542,735	\$35,660,111	\$37,046,694

*This article provides the annual operating budget for the Concord Public Schools with additional funding above the Finance Committee Guideline in the amount of \$236,584; the additional funding provides foreign language instruction at the K-5 level and a Latin elective at Concord Middle School. The appropriation to be presented for Town Meeting approval of \$37,046,694 is at the Concord School Committee Adopted Budget level voted on December 20, 2016.*

**Finance Committee recommends affirmative action in the amount of \$36,810,111.  
Select Board will make its recommendation at Town Meeting.**

#### **FY2017 CONCORD PUBLIC SCHOOLS SUPPLEMENTAL APPROPRIATION**

**ARTICLE 14.** To determine whether the Town will vote to transfer from available funds in the treasury, or transfer from the current year appropriations, the sum of \$400,000, or any other sum, to be added to the appropriation voted under Item No. 32 Reserve Fund of Article 7 of the Warrant of the 2016 Annual Town Meeting, for the purposes of meeting extraordinary and unforeseen expenditures in the Concord Public Schools Budget, or take any other action relative thereto.

*This funding is being requested by the School Committee due to higher than anticipated special education costs for the Concord Integrated Pre-school Program. These expenses were identified after development of the current year budget for the fiscal year ending June 30, 2017. The appropriation is proposed to be made to the Reserve Fund appropriation account. Allocation from this account is subject to a vote of approval of the Concord Finance Committee upon a specific request of the School administration. All or part of this sum could be transferred to the current year school budget based upon actual need determined by the Finance Committee on or before closing of budget transactions for the fiscal year ending June 30, 2017.*

**Finance Committee will make its recommendation at Town Meeting.  
Select Board will make its recommendation at Town Meeting.**

#### **CONCORD PUBLIC SCHOOLS RENOVATIONS**

**ARTICLE 15.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws the sum of \$850,000, or any other sum, to be expended under the direction of the School Committee for remodeling, reconstructing or making extraordinary repairs, including original equipment and related work, at various Concord Public School facilities, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$850,000 for construction, renovations, repairs, and related work at various Concord Public School facilities. This borrowing is part of the Town Manager's Five-Year Capital Plan, with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$850,000.  
Select Board recommends affirmative action in the amount of \$850,000.**

#### **CONCORD-CARLISLE REGIONAL HIGH SCHOOL BUDGET**

**ARTICLE 16.** To determine whether the Town will vote to raise and appropriate the sum of \$21,856,357, or any other sum, for the following necessary and expedient purposes of the Concord-Carlisle Regional School District for the fiscal year ending June 30, 2018, or take any other action relative thereto

**CONCORD-CARLISLE REGIONAL HIGH SCHOOL BUDGET**

	Department/Description	Fiscal 2016 Adopted	Fiscal 2017 Adopted	Fiscal 2018 School Committee Vote of Dec. 21, 2016
1	Concord-Carlisle Regional High School			
	Total Budget	\$30,643,037	\$31,741,774	\$33,301,609
	Concord assessment	\$20,070,650	\$20,783,976	\$21,856,357*
*(includes \$18,192,290 assessment for operating budget and \$3,664,067 assessment for debt)				

*This article provides Concord's assessed share of the annual operating budget for the Concord-Carlisle Regional High School. The appropriation to be presented for Town Meeting approval is above the spending guideline set by the Concord Finance Committee in November 2016. The additional assessed share, \$257,285, supports the expansion of transportation services required to accommodate a later high school start time.*

Finance Committee recommends affirmative action in the amount of \$17,935,005.  
 Select Board will make its recommendation at Town Meeting at Town Meeting.

**CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT – LANDFILL FLEXIBLE CAP REMEDIATION**

**ARTICLE 17.** To determine whether the Town will vote to approve \$1,200,000, or any other sum, of debt authorized by the Concord-Carlisle Regional School Committee for landfill remediation at 500 Walden Street; provided, however, that this approval shall be contingent upon passage of a Proposition 2½ debt exclusion referendum under General Laws Chapter 59, §21C(k) to exempt the Town's allocable share of the amounts required for the payment of interest and principal on said borrowing; or take any other action relative thereto.

*This article provides Concord's share of the cost for remediation of the former private landfill located on Concord-Carlisle Regional School District land with upgraded flexible cap fill materials that better allow future improvements to the remediated area. The costs to be assessed annually over a period of years consistent with the term of bonds to be issued by the district with debt service expected to commence in Fiscal Year 2019.*

Finance Committee recommends affirmative action in the amount of \$1,200,000.  
 Select Board recommends affirmative action in the amount of \$1,200,000.

**MINUTEMAN REGIONAL TECHNICAL HIGH SCHOOL DISTRICT BUDGET**

**ARTICLE 18.** To determine whether the Town will vote to raise and appropriate, or transfer from available funds in the Treasury, the sum of \$599,313, or any other sum, for the following necessary and expedient purposes of the Minuteman Regional Technical High School District for the fiscal year ending June 30, 2018, or take any other action relative thereto.

<b><u>MINUTEMAN REGIONAL TECHNICAL HIGH SCHOOL DISTRICT BUDGET</u></b>				
	Department/Description	Fiscal 2016 Adopted	Fiscal 2017 Adopted	Superintendent's Proposed Budget & Fiscal 2018 Assessment
1	Minuteman Regional High School			
	Budget	\$19,831,003	\$19,728,097	\$19,449,466
	Assessment	\$407,040	\$423,444	\$599,313
(est. @ 1/17/2017)				

*This article provides Concord's assessed share of the annual operating budget for the Minuteman Regional Technical High School District. Concord's assessment increase is due primarily to increased enrollment. Enrollment at 10/1/15 was 15 high school students plus 2 post-grad students. Enrollment at 10/1/16 was 21 high school students plus 2 post-grad*

*students. Each of the member town assessments is calculated by a formula established pursuant to the regional agreement.*

Finance Committee recommends affirmative action in the amount of \$599,313.  
Select Board recommends affirmative action in the amount of \$599,313.

### **FREE CASH USE**

**ARTICLE 19.** To determine whether the Town will vote to transfer from Free Cash, the sum of \$1,000,000, or any other sum, to be used by the Board of Assessors to reduce the tax levy for the fiscal year ending June 30, 2018, or take any other action relative thereto.

*This article seeks Town Meeting approval to allocate a portion of the available General Fund balance to support the FY2018 budget. The proposed amount is consistent with the Finance Committee's FY2018 Guideline Budget Plan.*

Finance Committee recommends affirmative action in the amount of \$1,000,000.  
Select Board recommends affirmative action in the amount of \$1,000,000.

### **BY PETITION RESOLUTION - REDUCING THE INFLUENCE OF MONEY IN POLITICS**

**ARTICLE 20.** To determine whether the Town will vote to adopt the following resolution

WHEREAS, the current and increasing role of money in politics threatens the democratic ideals upon which our republic was founded: and

WHEREAS, the Town of Concord holds an important position in the historical development of this republic; and

WHEREAS, it is incumbent upon the heirs of this history to speak out when the republic is threatened by the accelerated advance of oligarchy – in place of government of the people, by the people and for the people;

NOW THEREFORE, BE IT RESOLVED, it is the position of the Town of Concord, Massachusetts, that, in order to ensure that elected officials represent us all, tough, new, anti-corruption laws must be passed by Congress and the Massachusetts General Court, such as: legislation prohibiting politicians from taking campaign money from industries they regulate; regulating SuperPACs and other groups; increasing transparency of campaign funding; preventing elected representatives and some senior staff from negotiating jobs while in office and barring them from all lobbying activity for five years after they leave office; empowering all voters through a publicly funded election system; and strengthening enforcement by government agencies and ethics committees of the rules against politicians and special interests that break campaign finance laws.

BE IT FURTHER RESOLVED that the legal voters of the Town of Concord implore our elected representatives in Boston, State Senator Michael Barrett and Rep. Cory Atkins; and in Washington, Sen. Edward Markey and Sen. Elizabeth Warren and Rep. Niki Tsongas (or their successors) to lead this effort to enact these initiatives in Massachusetts and in Congress.

or take any other action relative thereto.

*Petitioner's Explanation: This Article asks whether Town Meeting will adopt a resolution calling upon the Congress of the United States and the Massachusetts General Court to pass tough, new anti-corruption laws such as legislation: prohibiting politicians from taking money from industries they regulate, regulating SuperPACs, increasing transparency of campaign funding, preventing elected representatives and some senior staff from negotiating jobs while in office and barring them from all lobbying activity for 5 years after they leave office, establishing a publicly funded election system, strengthening enforcement by agencies and ethics committees of campaign finance laws.*

Select Board will make its recommendation at Town Meeting.

### **ESTABLISH REVOLVING FUND – RENTAL INCOME FROM MARSHALL & BARRETT’S MILL FARMS**

**ARTICLE 21.** To determine whether the Town will vote to accept M.G.L. Chapter 40, Section 3 Second Paragraph, as inserted by Chapter 218 of the Acts of 2016, which would allow the Treasurer to set aside any monies received from the rental or lease of the Barrett Farm at 449 Barrett’s Mill Road and the Marshall Farm at 169 Harrington Avenue, in a separate account in the Town Treasury to be expended by the Town Manager without further appropriation for upkeep and maintenance of the properties, and further, that any unexpended balance remaining at the end of the fiscal year be retained in said account for future upkeep and maintenance of these same facilities so rented or leased, or take any other action relative thereto.

*The Town owns the properties 169 Harrington Avenue and 449 Barrett’s Mill Road and leases those properties at below-market rates to tenants who have committed to actively farming the land. Currently, the monthly rental income from these tenants is deposited into the Town’s General Fund. Under the lease agreements, the tenants must provide routine upkeep and maintenance of the properties; and the Town, as landlord, has committed to undertaking major repairs such as replacing heating systems, roofing and wiring. Any such major capital improvements require an appropriation. The article would establish a revolving fund so that the rental income from the properties would be immediately available for use by the town to make needed repairs. The revolving fund model has been used with success with the Harrington House at 249 Harrington Avenue with the rental income covering the cost of property maintenance since the property was acquired in 1975.*

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

### **PEG ACCESS AND CABLE-RELATED FUND**

**ARTICLE 22.** To determine whether the Town will vote to appropriate from the PEG Access and Cable-Related Fund the sum of \$560,000, or any other sum, said funds to be expended during the fiscal year commencing July 1, 2017 under the direction of the Town Manager for necessary and expedient cable-related purposes consistent with the license agreement, of which the sum of \$360,000 is the estimated license revenue to be received during FY2018 in accordance with the license agreement and the sum of \$200,000 shall be allocated from the available fund balance, or take any other action relative thereto.

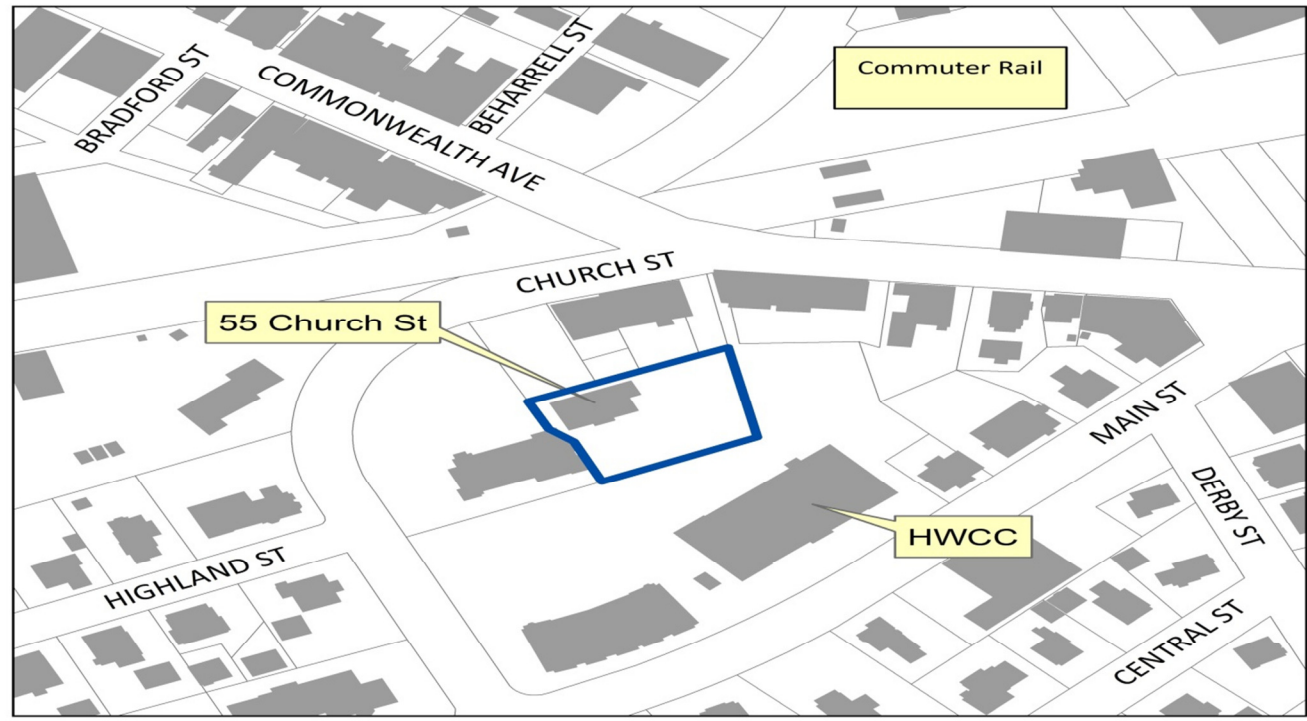
*The Town currently receives 4.8% of all revenue generated by Comcast from the company’s Concord customers. This amounts to about \$90,000 per quarter or \$360,000 per year. This article proposes that the revenue from Comcast during calendar 2016 be appropriated, to be used only for cable-related purposes in accordance with the ten-year license agreement, and that an additional \$200,000 available in the PEG Access and Cable-Related Fund be appropriated for capital improvements needed to enhance PEG access services. PEG Access services are Public, Educational and Governmental local cable television channels.*

**Finance Committee recommends affirmative action in the amount of \$560,000.  
Select Board recommends affirmative action in the amount of \$560,000.**

### **AUTHORIZE ACQUISITION OF 55 CHURCH STREET PROPERTY**

**ARTICLE 23.** To determine whether the Town will vote to authorize the Select Board to acquire, by purchase, gift, eminent domain or otherwise, fee, easement and/or other property interests in, on, over, across, under and along all or any portion of the property at 55 Church Street, including the buildings and appurtenances thereon, shown on the assessors maps as parcel #2411-1, containing 0.41 acres more or less, for municipal purposes, under such terms and conditions as the Select Board may determine, and further, that to meet such appropriation the Town will vote to raise and appropriate, transfer from available funds in the Treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$1,200,000, or any other sum, for the purpose of acquiring said property, including any necessary improvements to the property and incidental related expenses, and further that any premium received by the Town upon the sale of

any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.



*This article would authorize the purchase of a property owned by the Holy Family Parish which consists of a 17,849 square foot site with a three-story office building containing 5,070 square feet of finished office space and an unfinished third floor. The building was constructed in 2003, includes an elevator and is compliant with the Americans with Disabilities Act. The building would be used to house the town's human services staff who currently work at 105 Everett Street. The proximity of the site to the Harvey Wheeler Community Center and the Council on Aging creates synergies with groups using the Harvey Wheeler site. The lower floor has a finished kitchen and meeting room that will provide needed space for community meetings.*

**Finance Committee recommends affirmative action in the amount of \$1,200,000 from Free Cash. Select Board recommends affirmative action in the amount of \$1,200,000.**

### **FUNDING FOR TELECOMMUNICATIONS SERVICES**

**ARTICLE 24.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the Treasury or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$1,000,000, or any other sum, to be expended under the direction of the Town Manager for the purpose of providing telecommunication services to Concord residents and businesses, including broadband internet services and telephone, said funds to be used for equipment, contract services and other functions necessary to offer telecommunications services for a fee, the cost of such services to be paid for by the users of such services, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, provided further that while any bonds or notes issued pursuant to this vote will be general obligations of the Town, and it is the Town's intent that debt service is to be paid from revenues of the

Telecommunications Fund established by vote under Article 48 of the 2013 Annual Town Meeting, or take any other action relative thereto.

***Town Meeting voted in 2003 and 2004 to authorize CMLP to enter into the telecommunications services business. Since then, CMLP has constructed a fiber-optic network throughout most of Concord to manage the Town's electric grid and other public infrastructure that can also provide telecommunications. The 2013 Annual Town Meeting voted under Article 48 to authorize an initial borrowing of \$1 million to start the Town's broadband services program. As of January 2017, the service has more than 750 residential and business customers, and interest is growing. This borrowing authorization will enable CMLP to perform significant equipment upgrades and additional fiber-optic network construction required to meet this higher customer demand. Debt service costs and any related operating costs will be fully supported from user charges, with no property tax or General Fund support.***

**Finance Committee recommends affirmative action in the amount of \$1,000,000.  
Select Board recommends affirmative action in the amount of \$1,000,000.**

### **FUNDING FOR TECHNOLOGY IMPROVEMENTS**

**ARTICLE 25.** To determine whether the Town will vote to transfer from free cash transfer the sum of \$1,500,000, or any other sum, to be expended under the direction of the Town Manager for the purpose of modernizing the town's computer services including software, hardware, training and related services for program enhancements in financial services, billing, general ledger, license and permit tracking, email, document management and other computerized municipal services, or take any other action relative thereto.

***This article will provide funding for the Town to undertake several major technology improvement projects which will be implemented over several years. These projects require significant investment in software and implementation that exceed the resources available within the operating budget's Technology Fund. The first project will enable electronic permits, licensing and automation related to applications and renewal processing. Projects selected for this program support multiple departments and focus on integration and improving services.***

**Finance Committee recommends affirmative action. Article to be taken up at Special Town Meeting.**

### **SMART-GRID IMPROVEMENTS**

**ARTICLE 26.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$3,000,000, or any other sum, to be expended under the direction of the Town Manager for the purpose of purchasing and deploying smart-meters and smart-grid technology, including advanced communications networks, information and data management systems, distribution automation (DA) technologies, advanced metering infrastructure (AMI), system analytic capability, and distributed generation (DG) acquisition, said expenses to be paid by the ratepayers of the Concord Municipal Light Plant, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

***This article authorizes the treasurer to borrow \$3,000,000. The Concord Municipal Light Plant has deployed a fiber-optic network and a limited number of smart meters for more than five years. The proposed borrowing would speed the process of deploying smart meters throughout the town in order to better manage the electrical distribution system and to assist residents and business customers to manage electricity usage and to allow CMLP to adapt to rapidly changing electricity markets including the increasing amount of distributed power generation from individual producers such as customers with rooftop solar arrays. Debt service, under this article will be paid from the light fund.***

**Finance Committee recommends affirmative action in the amount of \$3,000,000.  
Select Board recommends affirmative action in the amount of \$3,000,000.**

## **COMPREHENSIVE MUNICIPAL FACILITY NEEDS STUDY**

**ARTICLE 27.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$250,000, or any other sum, to be expended under the direction of the Town Manager for the purposes of financing the cost of a comprehensive analysis of municipal facility and space needs, including public safety, public works, planning, human services and general government space needs, and including related consulting services such as engineering, surveying, geotechnical, and architectural services, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*The Town's administrative office facilities in the Town House and 141 Keyes Road have reached maximum occupancy for staff. The buildings have inadequate space for staff and committee meetings and are not well-suited for large public meetings. The West Concord Fire Station is undersized for housing and standard fire apparatus and has insufficient living space for the staff who operate the ambulance serving West Concord. The Police/Fire Station on Walden Street is also at maximum capacity and has insufficient parking and is not laid-out well for efficient operations. The funds requested by this article would enable the Town to hire a professional consultant to assist in evaluating the Town's existing facilities and to help plan to meet the community's future public service needs.*

Finance Committee recommends affirmative action in the amount of \$250,000.  
Select Board recommends affirmative action in the amount of \$250,000.

## **BY PETITION GUIDELINE FOR PRESERVATION OF PUBLIC ACCESS TO OPEN SPACE**

**ARTICLE 28.** To determine whether the Town will vote to adopt the following resolution:

WHEREAS the Town desires, consistent with the preservation and protection of natural resources and the environment and the legitimate interests of private property owners and the Town, that reasonable public access to Concord's trails, forests, fields, rivers, and other open spaces should be preserved and, where possible, expanded or created;

THEREFORE the Town urges the Select Board and Town Manager to adopt policies to require Town Officials, Committees, and Departments to use this principle as guidance and consider it a priority in their actions and deliberations, including any policies, decisions, negotiations, recommendations, and regulations that would or could affect public access to Concord's open spaces, or take any other action relative thereto.

*Petitioner's Explanation: This Article asks Town Meeting to affirm as a guiding principle that public access to open space is a priority. Town officials, committees and departments should consider this in their actions and deliberations, along with protecting the natural environment, private property rights, and the other interests of the Town. The Town's current implicit philosophy preserves the unique character of Concord and offers opportunities for its citizenry to enjoy its special natural places. An affirmative vote for this explicit guidance would be the public voice of support to ensure continuation and enhancement of this implicit philosophy.*

Select Board will make its recommendation at Town Meeting.

## **COMMUNITY PRESERVATION COMMITTEE APPROPRIATION RECOMMENDATIONS**

**ARTICLE 29.** To determine whether the Town will vote to appropriate the sum of \$1,326,340, or any other sum, from the Concord Community Preservation Fund, of which \$143,071 shall be appropriated from the undesignated fund balance as of June 30, 2016 and \$1,183,269 shall be appropriated from projected Fiscal Year 2018 Fund Revenues, in accordance with Chapter 44B of the Massachusetts General Laws, to be expended under the direction of the Town Manager as follows:

Item	Project/Description	Category	Sources		Total Amount Recommended
			Prior Year Fund Balance	FY18 CPA Fund Revenues	
A	Town of Concord – Regional Housing Services Program	Community Housing		18,000	18,000
B	Emerson Umbrella – Window Restoration Phase II	Historic Preservation		101,000	101,000
C	Concord Public Works - Sleepy Hollow Cemetery Roadway and Stone Wall Improvements	Historic Preservation	143,071	156,929	300,000
D	Concord Museum – Systems Replacement Project	Historic Preservation		170,000	170,000
E	Louisa May Alcott’s Orchard House – Climate Control Project	Historic Preservation		100,000	100,000
F	Concord Home for the Aged - Timothy Wheeler House Historic Structure Report	Historic Preservation		15,000	15,000
G	Concord Children’s Center – Replacing Trees in the Natural Playscape at Ripley	Open Space		6,000	6,000
H	Open Space Reserve Fund	Open Space		120,000	120,000
I	Town of Concord Natural Resources Division – Chamberlin Park Bridge Replacement	Open Space		9,670	19,340
		Recreation		9,670	
J	Concord Integrated Pre School Steering Committee – CIPS Playground Initiative	Recreation		105,000	105,000
K	Town of Concord Recreation Department – Rideout Improvement Project	Recreation		46,000	46,000
L	Land Acquisition Reserve Fund	TBD		180,000	180,000
M	Town of Concord – Staff and Technical Support	Administrative		30,000	30,000
N	Community Housing Reserve Fund	Community Housing		116,000	116,000
			<b>143,071</b>	<b>1,183,269</b>	<b>\$1,326,340</b>

or take any other action relative thereto.

***This article authorizes the appropriation of funds from the Community Preservation Fund for the completion of specific projects as listed in the above chart and allowed under the Community***

***Preservation Act. These projects will expend a total of \$134,000 for Community Housing, \$686,000 for Historic Preservation, \$135,670 for Open Space, \$160,670 for Recreation, \$30,000 for Administration, and will set \$180,000 aside for future land acquisition projects in any category. Town Meeting may reduce or reject but may not increase the appropriation from the Community Preservation Fund for any item proposed by the Committee. State law requires that a minimum of 10% of the annual revenues of the Community Preservation Fund be either appropriated to or reserved for future spending for each of three categories: Community Housing, Historic Preservation and Open Space purposes.***

Finance Committee recommends affirmative action in the amount of \$1,326,340.  
Select Board recommends affirmative action in the amount of \$1,326,340.

**APPROPRIATION RECOMMENDATION FOR JUNCTION VILLAGE AFFORDABLE ASSISTED LIVING DEVELOPMENT**

**ARTICLE 30.** To determine whether the Town will vote to appropriate the sum of \$350,000, or any other sum, from the Concord Community Preservation Fund and to appropriate the sum of \$1,000,000 from Free Cash, the combined total appropriation of \$1,350,000 to be expended under the direction of the Town Manager for the purpose of constructing affordable housing units in the Junction Village Affordable Assisted Living Development; provided further than the sum appropriated from the Community Preservation Fund shall be designated as follows: \$271,757 from the Community Housing Reserve Fund and \$78,243 from projected Fiscal Year 2018 Fund Revenues of the Community Preservation Fund, in accordance with Chapter 44B of the Massachusetts General Laws; and provided further to authorize the Town to acquire/grant an affordable housing restriction in accordance with Chapter 184, of the Massachusetts General Laws; or take any other action relative thereto.

***This article authorizes the appropriation of funds from the Community Preservation Fund for the construction of Community Housing units at the Junction Village Affordable Assisted Living Development as allowed under the Community Preservation Act. This project will expend a total of \$350,000 for Community Housing using a combination of existing Community Housing Reserve Funds and new CPA fund revenues. Town Meeting may reduce or reject but may not increase this appropriation from the Community Preservation Fund for any item proposed by the Committee. This article also appropriates \$1,000,000 of Free Cash to support this project, for a total appropriation of \$1,350,000.***

Finance Committee will make its recommendation at Town Meeting.  
Board of Selectmen will make its recommendation at Town Meeting.

**BRUCE FREEMAN RAIL TRAIL – GRANT OF EASEMENT TO MBTA**

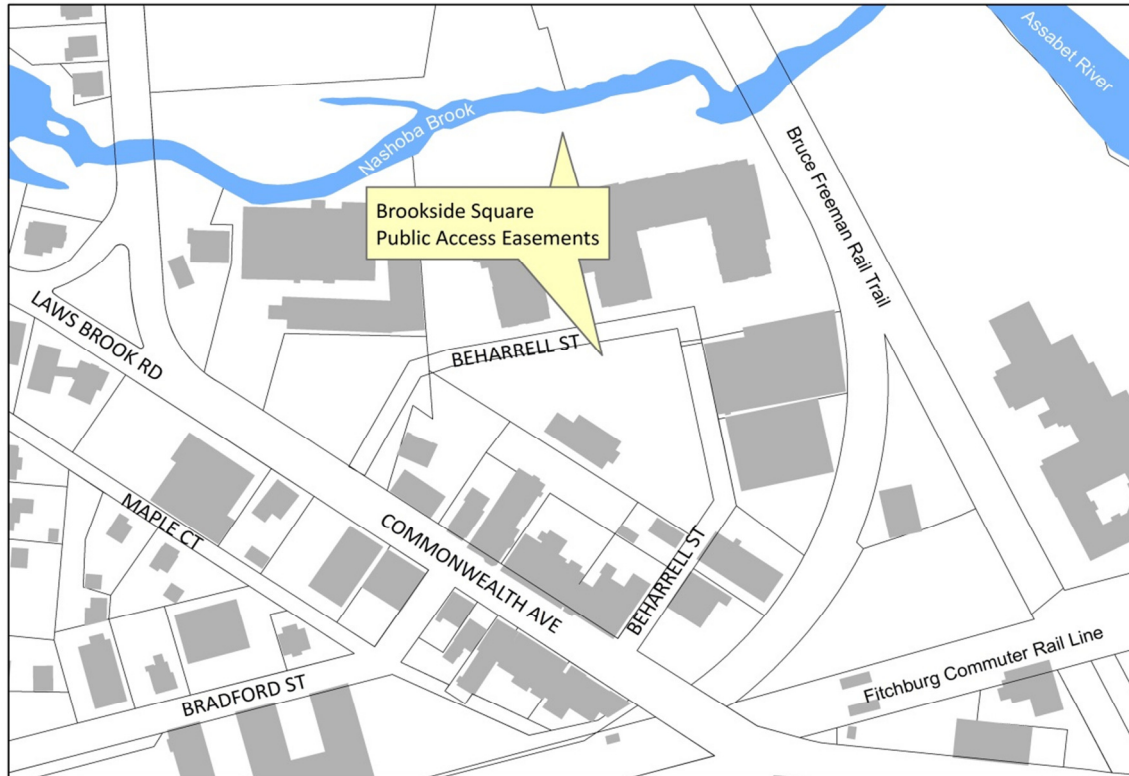
**ARTICLE 31.** To determine whether the Town will vote to authorize the Select Board to grant or deed easements over a parcel of land owned by the Town as follows: Parcel 2196-2, 6B Commonwealth Ave. (Deed Book 11800, Page 501), as shown on GIS maps dated January 3, 2017 and on file with the Town Clerk, for the purpose of exclusive use of six parking spaces by the MBTA in exchange for an easement granted by the MBTA to the Town to allow the improved multi-use rail trail for non-motorized transportation, open space, and recreation purposes and for all other purposes for which rail trails are now or hereafter may be used in the Commonwealth, or take any other action relative thereto.

***In 2016 the MBTA granted an easement to the Town of Concord that allows the Bruce Freeman Rail Trail to be constructed between the existing West Concord Depot/Club Car Café and 24 Commonwealth Ave./Woods Hill Table, which resulted in the loss of six parking spaces. This article will allow the Select Board to provide a reciprocal easement to the MBTA that allows its tenant (Club Car Café) exclusive use of six parking spaces on town-owned land in the West Concord commuter parking lot.***

Select Board recommends affirmative action.

**ACCEPT EASEMENTS – BROOKSIDE SQUARE DEVELOPMENT**

**ARTICLE 32.** To determine whether the Town will vote to authorize the Select Board to accept easements associated with the Brookside Square development on Beharrell Street in West Concord as shown on the following easement plans prepared by Control Point Associates, Inc.: 1) Beharrell Street Extension Right of Way Easement dated through June 8, 2016 for the perpetual public access over the Beharrell Street Extension Right of Way Easement by foot, bicycle or motorized vehicle, including the ongoing maintenance and repair of the paved roadway and pedestrian routes; 2) Public Access and Recreation Easement dated through May 11, 2016 for the purpose of providing a recreational walking path constructed to connect to the Bruce Freeman Rail Trail and other public paths as they now exist or may exist in the future, for the benefit of the public; and, 3) Post Office Easement dated March 30, 2016 for perpetual public access by foot, bicycle or motorized vehicle over land associated with the West Concord Post Office, all as on file with the Town Clerk, or take any other action relative thereto.



***The Brookside Square development at 50, 70 and 80 Beharrell Street and 13B Commonwealth Avenue was approved, in part, because of the extension of Beharrell Street back to Commonwealth Avenue creating a looped through-street. This article authorizes the Select Board to accept three easements: 1) the Beharrell Street Extension Right-of-way Easement; 2) the Public Access and Recreation Easement and 3) the Roadway and Sidewalk Easement for the Post Office parcel that benefits the public, including the ongoing maintenance and repair of the roadway and pedestrian routes within the right-of-way.***

**Select Board recommends affirmative action.**

### **GRANT OF EASEMENT TO W.R. GRACE**

**ARTICLE 33.** To determine whether the Town will vote to authorize the Select Board to grant or deed easements, on terms and conditions acceptable to the Select Board, over a parcel of land owned by the Town at 37 Knox Trail, Acton, MA and 214Y Main Street, Concord, MA, for the purpose of providing access to W.R. Grace & Co—Conn. and its subsidiaries, affiliates, consultants, contractors, or agents (collectively “Grace”) to said parcel for Grace to access, construct, maintain, repair, inspect, and sample groundwater monitoring and extraction wells and associated lines, piping, connections, equipment, and appurtenances on said parcels to the extent and in the manner required by the United States Environmental Protection Agency or the Massachusetts Department of Environmental Protection, or take any other action relative thereto.

*The Town took the property in Concord with an address of 214Y Main Street, Concord, MA by eminent domain in August 2015, and purchased the property in Acton, MA with an address of 37 Knox Trail. It recently completed the installation of a solar energy facility and is currently constructing a bus depot on the property. Prior to that, the property was owned by W.R. Grace and W.R. Grace has continuing obligations under orders from the U.S. EPA and the MassDEP to continue groundwater monitoring activities at the site. The Town therefore seeks to provide access to the site for as long as EPA and DEP require W.R. Grace to continue to monitor the site, on such terms and conditions as the Select Board might agree in order to protect the Town.*

Select Board recommends affirmative action.

### GRANT OF EASEMENT OVER 26A BALLS HILL ROAD

**ARTICLE 34.** To determine whether the Town will authorize the grant by the Select Board to the Concord Land Conservation Trust ("CLCT"), on such terms and conditions as the Select Board may determine, an easement for passive recreation over existing trails and cart paths on and across the land identified on Town of Concord's Assessor's Map 4J as Block 1374, commonly known as 26A Balls Hill Road, to adjacent conservation land owned by CLCT or to take any other action relative thereto.

*The Town of Concord has owned the 26A Balls Hill Road since its acquisition in 2000 for water supply purposes. In December 2016 the Town and CLCT acquired adjacent land commonly known as 221 and 265 Balls Hill Road. CLCT's portion of 265 Balls Hill Road is landlocked so CLCT has requested that the Town grant an easement over 26A Balls Hill Road to permit CLCT and the public access to the CLCT portion of 265 Balls Hill Road.*

No Motion is expected.

### ZONING BYLAW AMENDMENT - SITE PLAN REVIEW FOR RELIGIOUS USES, EDUCATIONAL USES AND CHILD CARE FACILITIES

**ARTICLE 35.** To determine whether the Town will vote to amend the **Zoning Bylaw Section 11.8.7.1 Site Plan Review** for religious uses, educational uses and child care facilities to delete the words ",sound and sight buffers, and preservation of light and air" from subsection (e) so that the Section reads as follows:

*11.8.7.1* In reviewing the site plan submittal for religious uses, educational uses and child care facilities, the following issues shall be considered:

- (a) Relationship of the bulk and height of structures and adequacy of open spaces to the natural landscape, existing buildings and other community assets in the area and compliance with other requirements of this Bylaw, which includes, but is not limited to, building coverage requirements, yard sizes, lot areas and setbacks.
- (b) Physical layout of the plan as it relates to convenience and safety of vehicular and pedestrian movement within the site, the location of driveway openings in relation to traffic or to adjacent streets and, when necessary, compliance with other regulations for the handicapped, minors and the elderly.
- (c) Adequacy of the arrangement of parking and loading spaces in relation to the proposed uses of the premises.
- (d) Physical lighting of the site, especially the adequacy of the method of exterior lighting for convenience, safety and security within the site and for protection of neighboring properties, roadways and the night sky.
- (e) Protection of adjoining premises against seriously detrimental uses by provision for surface water drainage.
- (f) Adequacy of the methods of disposal of refuse and other wastes resulting from the uses permitted on the site.
- (g) Adequacy of fire protection measures.

or take any other action relative thereto.

*This amendment was approved at the 2016 Annual Town Meeting. However, there was a discrepancy between the opening paragraph and the actual wording of the Bylaw under subsection (e) so a corrected amendment is being resubmitted. Under the State's Zoning Act, educational uses, religious uses or child care facilities are exempt from evaluation criteria such as sound and sight buffers and the preservation of light and air.*

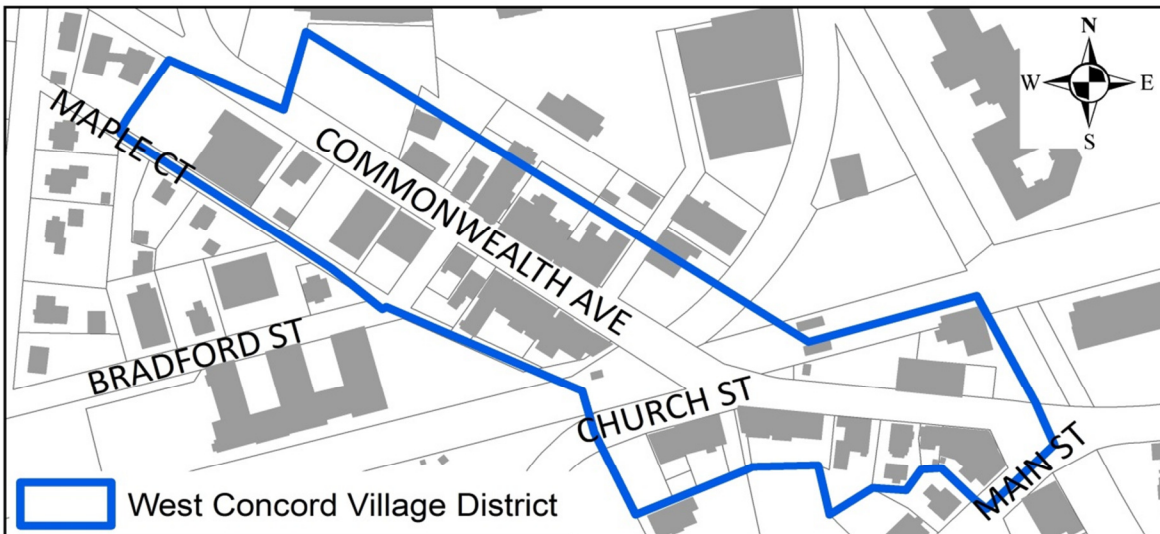
Select Board recommends affirmative action.

**ZONING BYLAW AMENDMENT – PROFESSIONAL OFFICE**

**ARTICLE 36.** To determine whether the Town will vote to amend the **Zoning Bylaw Section 4.5.11 Professional office** to add the words “real estate broker” following the word “engineer” so that the Section reads as follows:

*4.5.11 Professional office:* Office of a doctor, lawyer, accountant, architect, engineer, real estate broker, or similar professionals.

or take any other action relative thereto.



*The West Concord Village (WCV) District Zoning regulations were implemented to promote uses that encourage pedestrians, which add to the vitality and vibrancy of the Village. Currently in the WCV District, financial and business offices are allowed by right and professional offices are allowed, but not on the first floor. Because the Zoning Bylaw does not define a real estate broker, the Building Commissioner has classified real estate office as a business office. This Bylaw amendment will add real estate broker to the definition of people who have a professional office, thereby prohibiting a real estate office from locating on the first floor of buildings in the West Concord Village District. Existing real estate offices in the WCV District will then become ‘pre-existing non-conforming uses’. The WCV District is the only district where this prohibition would apply. Professional offices would continue to be allowed on the first floor of buildings in all other business and commercial districts in Town.*

*A map showing the extent of the West Concord Village Zoning District appears above.*

Select Board will make its recommendation at Town Meeting.

**ZONING BYLAW AMENDMENT**  
**NONCONFORMING SINGLE AND TWO FAMILY RESIDENTIAL STRUCTURES**

**ARTICLE 37.** To determine whether the Town will vote to amend **Zoning Bylaw Section 7.1.5 Nonconforming Single and Two Family Residential Structures** to insert in the second sentence after the

words gross floor area the phrase “excluding basements, open or screened porches, and decks,” and to insert a new subsection “(d) extension of a structure by more than fifty percent (50%) is based on the aggregate of all expansions undertaken within a consecutive five year (5) period.” so that Section 7.1.5 reads as follows:

*Section 7.1.5 Nonconforming single and two family residential structures.* Nonconforming single and two family residential structures may be reconstructed, extended, altered, or structurally changed upon a determination by the Building Inspector that such proposed reconstruction, extension, alteration, or structural change does not increase the nonconforming nature of said structure. Where the proposed extension does not increase the gross floor area, excluding basements, open or screened porches, and decks, contained within the existing structure by more than fifty percent (50%), the following circumstances shall not be deemed to increase the nonconforming nature of said structure:

- (a) alteration to structure located on a lot with insufficient area which alteration complies with all current setback, yard, building coverage, maximum floor area ratio, and building height requirements.
- (b) alteration to a structure located on a lot with insufficient frontage which alteration complies with all current setback, yard, building coverage, maximum floor area ratio and building height requirements.
- (c) alteration to a structure which encroaches upon one or more required yard or setback areas, where the alteration will comply with all current setback, yard, building coverage, maximum floor area ratio and building height requirements.
- (d) extension of a structure by more than fifty percent (50%) is based on the aggregate of all expansions undertaken within a consecutive five year (5) period.

In all other cases, the Board may, by special permit, allow such reconstruction, extension, alteration, or change where it determines that the proposed modification will not be substantially more detrimental than the existing nonconforming structure to the neighborhood.

or take any other action relative thereto.

*This amendment is intended to make the method of measuring the gross floor area of a residence under Section 7.1.5 Nonconforming Single and Two Family Residential Structures consistent with Section 6.2.13 Maximum Floor Area Ratio. Having the measurement consistent leads to less confusion for property owners, architects and developers and simplifies the review process for Building Inspections Division staff. In addition, the new subsection (d) will address a current loophole that allows a property owner to receive a building permit to expand a nonconforming structure without a special permit if it is less than a 50% expansion in gross floor area, receive a Certificate of Occupancy and then apply for another building permit to expand the structure again if it is less than a 50% expansion in gross floor area. The Board selected a 5-year period because that is consistent with an existing section in the Zoning Bylaw dealing with an aggregate of all expansions for Site Plan Review.*

Select Board recommends affirmative action.

### ZONING BYLAW AMENDMENT – RESIDENTIAL USES

**ARTICLE 38.** To determine whether the Town will vote to amend the **Zoning Bylaw Section 4.2.2.1: Two-family or additional dwelling unit** to:

delete the word “volume” in two locations and insert the phrase “gross floor area, excluding basements, open or screened porches, and decks,” and;

delete the word in the second sentence “structurally” and insert the words “integral to and” and insert the words “without use of a tunnel or pergola” so that the paragraph reads as follows:

#### *4.2.2 Two-family or additional dwelling unit:*

*4.2.2.1* The Board may grant a special permit for the alteration and use of a building existing at the time its lot is placed in a single residence district for not more than two (2) dwelling units, provided the gross floor area, excluding basements, open or screened porches, and decks, of any additions shall not exceed in all one-fifth of the gross floor area, excluding basements, open or screened porches, and decks, of the existing building. Any additions to create an additional dwelling unit pursuant to this section

shall be integral to and part of the existing building, without use of a tunnel or pergola, and share a common wall or floor with the existing building.

or take any other action relative thereto.

***A portion of this amendment (the added sentence at the end of the paragraph) was originally approved at the 2016 Annual Town Meeting under Article 35. However, there was a discrepancy between the opening paragraph of the 2016 article and the actual wording of the sentence added at the end of the paragraph, so this corrected amendment is being submitted in 2017. Additionally, the Planning Board has coordinated with Town staff to make the method used to measure a dwelling unit consistent with that used in other sections of the Zoning Bylaw. Only Section 4.2.2.1 uses volume as a measurement, so this amendment will change the measurement from volume to gross floor area.***

Select Board recommends affirmative action.

### **ZONING BYLAW AMENDMENT – MARIJUANA ESTABLISHMENT TEMPORARY MORATORIUM**

Temporary Moratorium on Marijuana Establishments Which Are Not Included in the Definition of Medical Marijuana Treatment Centers

**ARTICLE 39.** To determine whether the Town will vote to amend the Zoning Bylaw by adding a new Section 4.8 Marijuana Establishment Temporary Moratorium, as follows:

#### **4.8 Marijuana Establishment Temporary Moratorium**

##### *4.8.1 Definition*

"Marijuana establishment" shall have the meaning in General Law 94G, Section 1.

##### *4.8.2 Purpose*

By vote at the State election on November 8, 2016, the voters of the Commonwealth approved a law entitled the Regulation and Taxation of Marijuana Act (the "Act"), regulating the control and production and distribution of marijuana under a system of licenses and regulations. Currently under the Zoning Bylaw, a Marijuana Retailer or Establishment is not a permitted use in the Town and any regulations promulgated by the Cannabis Control Commission are expected to provide guidance to the Town in regulating marijuana sales and distribution. The regulation of marijuana raises novel and complex legal, planning, and public safety issues and the Town needs time to study and consider the regulation of Marijuana Retail or Distribution centers and address such novel and complex issues, as well as to address the potential impact of the State regulations on local zoning and to undertake a planning process to consider amending the Zoning Bylaw regarding regulation of Marijuana Retail sales and distribution and other uses related to the regulation of marijuana. The Town intends to adopt a temporary moratorium on the use of land and structures in the Town for Marijuana Retail and Distribution so as to allow the Town sufficient time to engage in a planning process to address the effects of such structures and uses in the Town and to enact bylaws in a manner consistent with sound land use planning goals and objectives.

##### *4.8.3 Temporary Moratorium*

For the reasons set forth above and notwithstanding any other provision of the Zoning Bylaw to the contrary, the Town hereby adopts a temporary moratorium on the use of land or structures for "Marijuana Establishments". The moratorium shall be in effect through July 1, 2018. During the moratorium period, the Town shall undertake a planning process to address the potential impacts of marijuana in the Town, consider the Cannabis Control Commission regulations regarding "Marijuana Establishments" and related uses, and shall consider adopting new Zoning Bylaws to address the impact and operation of Marijuana Establishments and related uses.

or take any other action relative thereto.

*The Planning Board believes a moratorium on marijuana establishments is necessary as stated in Section 4.8.2 Purpose. The law is complex and requires further guidance from the State and study by the Town on the development of an appropriate and enforceable bylaw. A law on the regulation and taxation of marijuana in Massachusetts was approved by vote at the State election on November 8, 2016 with an effective date of December 15, 2016. The Act, as amended by the Legislature, states the Cannabis Control Commission shall begin accepting applications for marijuana establishments on April 1, 2018 with the first licenses to be issued by July 1, 2018.*

## SELECT BOARD WILL MAKE ITS RECOMMENDATION AT TOWN MEETING

### GENERAL BYLAW - TREE PRESERVATION BYLAW

**ARTICLE 40.** To determine whether the Town will vote to amend the Town Bylaws by adding a Bylaw for Tree Preservation, as follows:

#### 1. PURPOSE

The intent of the Tree Preservation Bylaw (Tree Bylaw) is to encourage the preservation and protection of trees on residential lots during significant demolition and/or construction activity by (a) designating areas of a lot where trees must be protected, and (b) requiring mitigation for trees removed via replanting or collection of fees to support the Town's tree planting and maintenance efforts.

#### 2. DEFINITIONS

For the purposes of this Tree Bylaw, the following definitions shall apply:

- 2.1 *Caliper*: Diameter of a tree trunk (in inches). For trees up to and including four (4) inches in diameter, the caliper is measured six (6) inches above the existing grade at the base of the tree. For trees larger than four (4) inches in diameter, the caliper is measured twelve (12) inches above the existing grade at the base of the tree.
- 2.2 *Certified Arborist*: A professional arborist possessing current certification issued by the International Society of Arboriculture (I.S.A.) and/or the Massachusetts Arborist Association (M.A.A.).
- 2.3 *Diameter at Breast Height (DBH)*: The diameter of a tree trunk four and one-half (4.5) feet above the existing grade at the base of the tree. If a tree splits into multiple trunks below four and one-half (4.5) feet above the existing grade, the DBH shall be considered to be the measurement taken at the narrowest point beneath the split.
- 2.4 *Invasive Species*: Any plant listed on the most recent version of the Massachusetts Prohibited Plant List as published by the Massachusetts Department of Agriculture.
- 2.5 *Protected Tree*: Any existing tree with a DBH of six (6) inches or greater that has any portion of its trunk within a Tree Yard at grade level. Invasive Species (as defined herein) shall not be considered Protected Trees.
- 2.6 *Reviewing Agent*: Any agent delegated in writing by the Town Manager to administer and implement the Tree Bylaw.
- 2.7 *Tree Preservation Fund*: An account established pursuant to (M.G.L. 44 § 53E½) for the deposit of contributions in lieu of tree replanting as required by this Tree Bylaw.
- 2.8 *Tree Protection & Mitigation Plan*: A plan submitted to the Reviewing Agent for approval prior to the commencement of demolition and/or construction on a property on which a Protected Tree is located.
- 2.9 *Tree Removal*: Mechanical demolition of a living tree, or any act (a) that has caused a tree to die within the previous 12 months or (b) is likely to cause significant decline or death as determined by the Reviewing Agent.
- 2.10 *Tree Save Area*: The area surrounding all Protected Trees, sufficiently large to ensure the health of the Protected Tree(s), including their trunks, crowns, and root systems.
- 2.11 *Tree Yard*: The minimum front, side and rear yard setback area of a parcel in a residential zoning district as specified in Zoning Bylaw Table III.

### 3. TOWN OF CONCORD TREE FUND

There is hereby established a Town of Concord Tree Preservation Fund ("Tree Fund") pursuant to M.G.L. 44 § 53E½. Any contributions collected per Section 5.2(b) of this Tree Bylaw shall be deposited in the Tree Fund, and shall be used solely for the purpose of buying, planting and maintaining trees within residential neighborhoods in the Town.

### 4. SCOPE AND APPLICABILITY

- 4.1 Within the residential districts, it is prohibited to remove a protected tree during construction or within 12 months prior to application for a demolition or building permit for:
- (a) Demolition of an existing structure of 250 gross square feet or greater;
  - (b) Construction of any building or structure on a vacant lot; or
  - (c) Construction of one or more structures or additions to structures on a lot that increases the Gross Floor Area by 50% or greater, as defined by the Town of Concord Zoning Bylaw Section 7.1.5.
- 4.2 The requirements of this Tree Bylaw shall not apply to:
- (a) The subdivision of land under Town of Concord Subdivision Rules and Regulations;
  - (b) Those areas of property under the jurisdiction of the Wetlands Protection Act (Chapter 131 and 310 CMR);
  - (c) Public Shade Trees pursuant to M.G.L. Chapter 87;
  - (d) Emergency projects necessary for public safety, health and welfare, as determined by the Reviewing Agent or the Town Tree Warden;
  - (e) Trees severely damaged as the direct result of a natural disaster;
  - (f) Trees that are hazardous as determined and confirmed in writing by a Certified Arborist, and;
  - (g) Trees currently infected by a disease or insect infestation of a permanent nature, as determined and confirmed in writing by a Certified Arborist.

### 5. TREE PROTECTION & MITIGATION

- 5.1 *Protection:* Each Protected Tree to be retained on property planned for demolition and/or construction activity shall be protected by the establishment of a fenced-off Tree Save Area. The Tree Save Area shall be delineated within the submitted Tree Protection & Mitigation Plan, shall be installed prior to any demolition or site work, and shall remain in place until work is completed on the property, excluding final landscaping. The applicant shall submit written documentation, prepared, dated and signed by a Certified Arborist, to the Reviewing Agent confirming that the required Tree Save Area has been installed as identified in the Tree Protection & Mitigation Plan before work on the property commences.
- 5.2 *Mitigation:* The removal of a Protected Tree(s) from a property in connection with one or more of the circumstances set forth in Section 4.1 shall require mitigation based upon aggregate DBH of Protected Tree(s) removed. Mitigation shall be achieved by satisfying one or a combination of the following provisions:
- (a) Replanting of Trees: For each inch of DBH of the Protected Tree(s) removed, no less than one-half inch of caliper of new tree(s) shall be replanted in accordance with the following:
    - (1) Each new tree must have a minimum caliper of two (2) inches;
    - (2) Such replanting, either on the applicant's land or on land abutting the applicant's land with the express written approval of the owner of such abutting land, shall occur prior to the issuance of a Final Certificate of Occupancy, or be otherwise assured at such time to the satisfaction of the Reviewing Agent in a manner consistent with the Rules and Regulations;
  - (b) Contribution to the Town of Concord Tree Preservation Fund: The Planning Board shall establish a Tree Fund contribution schedule with approval by the Select Board assigning a value per inch of DBH of Protected Tree(s) to be removed and not otherwise mitigated. Tree Fund contributions shall be received by the Town prior to the issuance of all applicable permits.

Mitigation measures shall be identified in the submitted Tree Protection and Mitigation Plan. The removal or proposed removal of a Protected Tree(s) that has been mitigated for, in conjunction with a previous applicable permit, shall not require additional mitigation under subsequent permits, unless such mitigation has not been completed or otherwise assured.

- 5.3 *Unauthorized Removals:* The removal of any Protected Tree not identified on the Tree Protection & Mitigation Plan shall require mitigation at the rate specified in Section 5.2. In addition, any person removing any Protected Tree not identified on the Tree Protection & Mitigation Plan in violation of this

bylaw shall be subject to a non-criminal disposition fine as specified in Appendix A of the Regulations for Enforcement of Town Bylaws under M.G.L. Chapter 40, §21D and the Bylaw for Non-Criminal Disposition of Violations adopted under Article 47 of the 1984 Town Meeting, as amended. Any such fines shall be paid to the Town of Concord.

#### 5.4 *Plan Review and Permit Issuance:*

- (a) *Tree Protection & Mitigation Plan Submittal:* Prior to the issuance of a permit in connection with one or more of the circumstances set forth in Section 4.1 on property on which a Protected Tree is located or was located within twelve (12) months prior to application, the owner of the property shall submit a Tree Protection & Mitigation Plan to the Reviewing Agent along with the applicable application and fee.
- (b) *Tree Protection & Mitigation Plan Requirements:* The submitted Tree Protection & Mitigation Plan shall be a to-scale survey or site plan that indicates the applicable Tree Yard, existing improvements, proposed construction, Protected Trees, Tree Save Area and preservation and maintenance procedures in accordance with the Rules and Regulations in effect at the time. It must also specify any tree removals and proposed mitigation measures per Section 5.2.
- (c) *Re-Submittal:* If demolition or construction has not commenced within twelve (12) months of the date that a Tree Protection & Mitigation Plan was submitted for a property, or if removal of a previously unidentified Protected Tree is necessary during the course of construction, an amended Tree Protection & Mitigation Plan shall be submitted identifying any changes from the previous plan and associated mitigation measures.
- (d) *Reviewing Agent Action:* If the Tree Protection & Mitigation Plan is consistent with the protection and mitigation requirements contained herein and any established Rules and Regulations, and applicable Tree Fund contributions have been submitted, the Reviewing Agent may issue any applicable permit or notify the appropriate Town Department. If the proposal does not meet or satisfy these requirements, the Reviewing Agent shall notify the applicant and the appropriate Town Department that all applicable permits shall not be issued until the requirements are met. If the Reviewing Agent fails to act on an application within thirty (30) days after the application has been made, it shall be deemed to be approved.

#### 5.5 *Maintenance of Protected and Replanted Trees:*

- (a) *Protected Trees:* Each Protected Tree retained shall be maintained in good health for a period of no less than twenty-four (24) months from the date of Final Inspection, or issuance of a Certificate of Occupancy if applicable. Should such tree die or significantly decline in the opinion of the Reviewing Agent within this twenty-four (24) month period, the owner of the property shall be required to provide mitigation consistent with the requirements for the removal of a Protected Tree as contained herein within nine (9) months from said determination.
- (b) *Replanted Trees:* All new trees planted to mitigate the removal of Protected Tree(s) shall be maintained in good health for a period of no less than twenty-four (24) months from the date of planting. Should such tree die within this twenty-four (24) month period, the owner of the property shall be responsible for replacing the tree with a tree equal to or greater than the size of the original Replanted Tree at installation; such replacement tree shall be planted within nine (9) months of the death or serious decline of the original Replanted Tree.

## 6. ADMINISTRATION

- 6.1 *Enforcement:* The Building Commissioner is hereby authorized to enforce all of the provisions of the Tree Bylaw.
- 6.2 *Appeals:* Any person who has been aggrieved by refusal, order, or decision of the Reviewing Agent or Building Commissioner, may appeal to the Zoning Board of Appeals within 20 days from the date of such refusal, order, or decision.

## 7. RULES AND REGULATIONS

The Planning Board may promulgate or amend Rules and Regulations which pertain to the administration of this Tree Bylaw, and shall file a copy of said rules in the office of the Town Clerk. Such rules may prescribe the size, form, contents, style, and number of copies of plans and specifications, the procedure for the submission and approval of such plans, and the procedure for determining final compliance with these regulations. The adoption

or amendment of Rules and Regulations shall be after a public hearing to receive comments on the proposed or amended Rules and Regulations. The public hearing shall be advertised once in a newspaper of general local circulation, at least 14 days prior to the date of the public hearing.

And to amend Appendix A of the Non-Criminal Disposition Bylaw by adding the following:

Bylaw	Fine Schedule	Fine Allowed	Enforcement Agency
Tree Preservation Bylaw	1 <sup>st</sup> offense 2 <sup>nd</sup> offense 3 <sup>rd</sup> & each subsequent offense	\$100 \$200 \$300	Building Commissioner

or take any other action relative thereto.

*In response to citizen concern over the loss of large trees and other significant tree cover on properties that are clear-cut prior to development, the Planning Board appointed a Tree Preservation Subcommittee to review the scope of the problem, gather public input and make recommendations on mitigation options. After reviewing current policies in Concord related to trees and comparing practices in Concord with various Massachusetts communities that have adopted Tree Preservation measures, the Subcommittee recommended that the Board submit a Tree Preservation Bylaw at the 2017 Town Meeting.*

*This bylaw requires residential property owners to protect trees within a defined setback area of a lot during significant demolition and/or construction activity. If trees are removed from the setback area, the bylaw requires property owners to either plant replacement trees or pay fees to a Town Tree Fund for planting elsewhere in town. This bylaw does not impact the removal of trees on a lot where no other construction is taking place.*

Select Board recommends affirmative action.

**TREE PRESERVATION REVOLVING FUND**

**ARTICLE 41.** To determine whether the Town will vote to establish under Massachusetts General Laws Chapter 44, Section 53E½, a Tree Preservation Revolving Fund, for the purposes of buying, planting and maintaining trees within residential neighborhoods in the Town, and that fees, charges and money received under the Tree Preservation Bylaw are to be deposited into this Revolving Fund and expended under the direction of the Town Manager without further appropriation; said revolving account expenditures shall not exceed \$100,000 for the year ending June 30, 2018, or take any other action relative thereto.

*The Planning Board has submitted a Tree Preservation Bylaw under Article 40. Section 5.2 of the Bylaw addresses when a property owner proposes to remove a Protected Tree(s) from a property and the requirement that a tree(s) be planted elsewhere on the property or funds be provided to a Tree Preservation Revolving Fund for the Town to use to buy, plant and maintain trees within residential neighborhoods elsewhere in the community.*

Finance Committee recommends affirmative action.

Select Board recommends affirmative action.

**BY PETITION ALTERNATIVE PRD PRELIMINARY SITE DEVELOPMENT AND USE PROPOSAL FOR LOT 4A AND PARCEL A FOREST RIDGE ROAD**

**ARTICLE 42.** To determine whether the Town will vote pursuant to Section 10.3.4 of the Zoning Bylaw to approve the Phase II Black Birch Alternative PRD Preliminary Site Development and use Proposal for Lot 4A and Parcel A Forest Ridge Road dated September 12, 2016 revised December 20, 2016 as filed with the Town Clerk and Planning Board, or take any other action relative thereto.

***Petitioner's Description: Concord's Long-Range Plan and Housing Production Plan have set goals for the Town to facilitate development of housing options for residents looking to downsize. Town Meeting approval of the Phase II Black Birch Alternative Planned Residential Development Preliminary Site Development and Use Proposal will enhance these housing opportunities and is the same type of approval voted in 2001 under Article 41 for the residences at Riverbend and in 2015 under Article 19 for the residences in Phase I of Black Birch.***

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**BY PETITION RELEASE OF RESIDENTIAL RESTRICTION APPLICABLE TO LOT 4A AND PARCEL A FOREST RIDGE ROAD**

**ARTICLE 43.** To determine whether the Town will vote to authorize the Select Board to enter into an agreement to release Lot 4A Forest Ridge Road containing 5.79± acres and Parcel A Forest Ridge Road containing 3.32± acres, both as shown on a plan entitled "Plan of Land in Concord, Massachusetts, Owned by: Todd A. Pulis, Trustee of Thoreau Realty Trust" dated August 25, 2016 to be recorded with the Middlesex South Registry of Deeds, from a certain Easement and Restrictive Covenant Agreement dated September 19, 1990 and recorded with said Deeds in Book 20781, Page 75 and to agree that said Lot 4A and Parcel A may be used for residential purposes as a primary use, or take any other action relative thereto.

***Petitioner's Description: This article requests that the Town vote to authorize the Select Board to enter into an agreement to release Lot 4A and Parcel A from a 1990 covenant and agree that Lot 4A and Parcel A may be used for residential purposes as a primary use. Lot 4A and Parcel A are a portion of the property located at 275 Forest Ridge Road. The requested authorization is the same type of approval voted in 2001 under Article 42 for the residences at Riverbend and in 2015 under Article 20 for the residences in Phase 1 of Black Birch.***

**Select Board recommends affirmative action.**

**REGIONAL HOUSING SERVICES REVOLVING FUND EXPENDITURES**

**ARTICLE 44.** To determine whether the Town will vote that the fees paid by member towns into the Regional Housing Services Revolving Fund, in an amount not to exceed \$200,000, or any other sum, be expended for the fiscal year ending June 30, 2018 without further appropriation, under the direction of the Town Manager, for the purposes of continuing the operation of a multi-town consortium set up to assist member communities in managing affordable housing resources, in accordance with Chapter 44, Section 53E½ of the Massachusetts General Laws, or take any other action relative thereto.

***The Select Boards in Acton, Bedford, Burlington, Concord, Lexington, Sudbury and Weston approved an inter-municipal agreement to participate in and jointly operate a Regional Housing Services Office (RHSO). The RHSO provides the member communities with affordable housing support and information. Concord has served as lead community since July 1, 2014.***

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**ROAD REPAIR REVOLVING FUND EXPENDITURES**

**ARTICLE 45.** To determine whether the Town will vote that the income from fees paid by applicants to the Town for permits to dig up, alter, or disturb a public way in accordance with the Motion passed under Article 47 of the 1992 Annual Town Meeting, in an amount not to exceed the sum of \$120,000, or any other sum, be expended without further appropriation for the purpose of repairing, restoring, maintaining and inspecting public ways, to be managed and expended by the Town Manager in accordance with Chapter 44, Section 53E½ of the Massachusetts General Laws, or take any other action relative thereto.

*Pursuant to Article 47 of the 1992 Annual Town Meeting, this article authorizes up to \$120,000 of fees collected through the Town's Right-of-Way Street Permit Program to be used in fiscal year 2018 for repairing, restoring, maintaining and inspecting the Town's public ways. This is a routine annual action, with the amount of the authorization dependent upon the available unreserved balance of the Fund at the time of the vote.*

**Finance Committee recommends affirmative action in the amount of \$120,000.**

**Select Board recommends affirmative action in the amount of \$120,000.**

### **CEMETERY ROADS AND INFRASTRUCTURE IMPROVEMENTS**

**ARTICLE 46.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$150,000, or any other sum, for the repair, construction, reconstruction, or renovation of roadways within the Sleepy Hollow Cemetery including drainage, curbing, retaining walls and related roadway infrastructure, said funds to be expended under the direction of the Town Manager; and further that the Town Manager be authorized to accept and expend state and/or county grants as may be available for the same purpose, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*Concord Public Works and the Cemetery Committee have developed a multi-phase plan to address infrastructure improvement needs at the Sleepy Hollow Cemetery. These improvements include roadway, drainage and retaining wall rehabilitation and reconstruction. The project is proposed to be funded through a combination of Community Preservation Act funding, Concord Public Works in-kind services, Cemetery Fund available resources and the proposed \$150,000 debt authorization. It is anticipated that this funding plan will address the majority of required roadway improvements within the Sleepy Hollow Cemetery; however, future Community Preservation Act and funding requests are anticipated to complete additional construction phases within Sleepy Hollow and other Town-owned cemeteries to address necessary repairs of walls and hardscape areas. The borrowing authorized is part of the Town Manager's five-year capital plan, with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$150,000.**

**Select Board recommends affirmative action in the amount of \$150,000.**

### **2017 ROADS AND PARKING LOTS PROGRAM**

**ARTICLE 47.** To determine whether the Town will vote to raise and appropriate, transfer from available funds in the treasury, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Chapter 44 of the Massachusetts General Laws, the sum of \$1,415,000, or any other sum, for the repair, reconstruction, renovation or design of roads, streets and parking lots within the town including drainage, curbing and sidewalk improvements, said funds to be expended under the direction of the Town Manager; and further that the Town Manager be authorized to accept and expend state grants as may be available for the same purpose, and that the Treasurer, with the approval of the Select Board, be authorized to borrow up to the amount stipulated in such grant or grants under the provisions of Chapter 44 of the Massachusetts General Laws, in anticipation of reimbursement of this amount, and further that any premium received by the Town upon the sale of any bonds or notes approved by this vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Chapter 44, Section 20 of the Massachusetts General Laws, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

*This article authorizes the Treasurer to borrow \$1,415,000 for the repair, reconstruction or renovation of Concord's roads and public parking areas. Combined with expected state road aid and \$100,000 proposed under Article 7, item 23, funds will be used to protect and replace Concord's 107 miles of public roads including drainage and sidewalk construction and renovation. This borrowing is part of the Town Manager's Five-Year Capital Plan, with the debt service cost to be funded within the levy limit.*

**Finance Committee recommends affirmative action in the amount of \$1,415,000.**

**Select Board recommends affirmative action in the amount of \$1,415,000.**

### **SENIOR MEANS-TESTED PROPERTY TAX EXEMPTION**

**ARTICLE 48.** To determine whether the Town Meeting will vote to accept the Special Act passed by the Great and General Court entitled An Act Establishing a Senior Means-Tested Property Tax Exemption in the Town of Concord, Chapter 374 of the Acts of 2016, as shown below, or take any other action relative thereto:

#### **Chapter 374 of the Acts of 2016**

#### **An Act Establishing a Senior Means-Tested Property Tax Exemption in the Town of Concord**

*Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same as follows:*

SECTION 1. With respect to each qualifying parcel of real property classified as Class 1, residential, in the town of Concord, there shall be an exemption from the property tax equal to the total amount of tax that would otherwise be assessed without this exemption less the sum of: (i) 10 per cent of the total annual qualifying income for purposes of the state circuit breaker income tax credit; and (ii) the amount of the state circuit breaker credit the applicant was eligible to receive in the year before the application being filed. The percentage of total annual qualifying income may be raised by section 3. Property taxes shall not be reduced by more than 50 per cent by this exemption. The exemption shall be applied to the domicile of the taxpayer only. For the purposes of this act, a "parcel" shall be a unit of real property as defined by the board of assessors under the deed for the property and shall include a condominium unit.

SECTION 2. The board of assessors may deny an application for the exemption in section 1 if the board finds that the applicant has excessive assets that place the applicant outside of the intended recipients of the senior exemption created by this act. Real property shall qualify for the exemption under section 1 if the following criteria are met:

- (i) the qualifying real property is owned and occupied by a person whose prior year's income would make the person eligible for the circuit breaker income tax credit under subsection (k) of section 6 of chapter 62 of the General Laws;
- (ii) the qualifying real property is owned by a single applicant who is 65 years of age or older at the close of the previous year or jointly if 1 of the joint applicants is 65 years of age or older at the close of the previous year and the other joint applicant is 60 years of age or older;
- (iii) the qualifying real property is owned and occupied by the applicant or joint applicants as their domicile;
- (iv) the applicant or not less than 1 of the joint applicants has been domiciled in the town of Concord for not less than 10 consecutive years before filing an application for the exemption;
- (v) the maximum assessed value of the domicile is not more than the town's median single-family residential assessed value of the prior fiscal year; and
- (vi) the board of assessors has approved the application for the exemption.

SECTION 3. The exemption under section 1 shall be in addition to any other exemption allowable under the General Laws, except that there shall be a dollar cap on the total exemptions granted pursuant to this act equal to 0.5 per cent of the fiscal year's total residential property tax levy for the town of Concord, including the levy for the regional high school if not included in the town's tax levy at some subsequent date with the total exemption amount granted pursuant to this act allocated proportionally within the tax levy on all residential taxpayers. After the first year of the exemption, the total cap on the exemptions granted pursuant to this act shall be set annually by the select board within a range of 0.5 percent to 1.0 per cent of the residential property tax levy for the town. If benefits to the applicants may be limited because the percentage established annually by the select board would otherwise be exceeded, the benefits shall be allocated by raising the total annual qualifying income

percentage as required in section 1 as necessary to not exceed the cap. If the cap exceeds the need for the exemption, the total cap on the exemptions granted pursuant to this act shall be reduced to meet the need.

SECTION 4. A person who seeks to qualify for the exemption under section 1 shall, before the deadline established by the board of assessors, file an application, on a form to be adopted by the board of assessors, with the supporting documentation of the applicant's income and assets as described in the application. The application shall be filed each year for which the applicant seeks the exemption.

SECTION 5. Acceptance of this act by the town of Concord shall be first by vote of approval at an annual town meeting, to be followed by an affirmative vote of a majority of the voters at any regular or special election at which the question of acceptance is placed on the ballot. Sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote by the town.

SECTION 6. This act may be revoked by an affirmative vote of a majority of the voters at any regular or special town election at which the question of revocation is placed on the ballot. Revocation of sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote of the town to revoke those sections.

SECTION 7. An exemption shall not be granted under this act until the department of revenue certifies a residential tax rate for the applicable tax year where the total exemption amount is raised by a burden shift within the residential tax levy.

SECTION 8. This act shall expire after 3 years of implementation of the exemption.

*The Tax Fairness Committee was appointed by the Select Board to examine "fair allocation of property tax burdens" as well as the "loss of economic diversity resulting from reliance on the property tax in Concord". The 2016 Town Meeting passed nearly unanimously a warrant article submitted by the Tax Fairness Committee which requested the State Legislature to pass a Special Act allowing Concord to adopt a senior means-tested property tax exemption which is based on a successful program in the Town of Sudbury. A bill with this purpose was passed by the Legislature on December 27, 2016 and was signed by the Governor on January 6, 2017. Warrant article # 48 asks the 2017 Town Meeting to accept this Act.*

*The Exemption would operate as follows. Income limits for the exemption are tied to the requirement of the State Income Tax Circuit Breaker – currently no more than \$56,000 for a single homeowner and \$70,000 for a married couple. The assessed value of the property must be lower than the median value of a Concord single family home. Applicants' property tax cannot be reduced by more 50%. The value of all such exemptions granted cannot exceed more than 1/2 of 1% of the Town's property tax levy. The exemption is funded by a shift in the residential tax rate and must be reviewed again in 3 years. If approved by this Town Meeting, it must then be approved by a majority of voters at a regular or special town election.*

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**BY PETITION REQUEST FOR HOME RULE LEGISLATION ALLOWING CONCORD TO ADOPT FEES TO FINANCE AFFORDABLE HOUSING**

**ARTICLE 49.** To determine whether the Town will vote to request the Select Board to ask our legislative representatives to file and seek passage of legislation authorizing the Town of Concord to adopt a fee structure substantially in the form shown below, for the purpose of financing a Town fund to support affordable housing.

1. Concord shall initiate a one-time fee to be assessed on certain new and newly expanded single-family houses.
2. The fee shall be assessed on new single-family houses built to exceed 3000 square feet in living area, at a rate of \$35 per square foot of the excess over 3000.

- 3. The fee shall be assessed on newly expanded single-family houses when the resulting house exceeds 3000 square feet in living area. If the house prior to expansion was below 3000 square feet, the fee will apply in the same manner as in item 2 above. If the house prior to expansion was over 3000 square feet, the fee will be \$35 per square foot applied to the living area after expansion minus the living area before expansion.
- 4. The living area of a house shall be measured in accordance with the method established by the Assessing Department of the Town of Concord.
- 5. The construction of single-family houses in Planned Residential Developments (PRDs) for which affordable housing is required will be exempt from this legislation.
- 6. The fee shall be paid by the owner of the property lot who initiates the plan for a new or expanded house on that lot at the time of issuance of the building permit.
- 7. The Town fund that results from the fees shall be held by the Town Treasurer in an account to be used at the direction of the Select Board for affordable housing purposes.

or take any other action relative thereto.

***Petitioner’s Explanation: Concord needs more affordable housing. A family whose income is at the Boston-area median level can afford to buy a house costing no more than \$311,000, well below all market-priced houses in Concord. This article proposes a fee schedule based on new and newly expanded single-family houses in Concord. The revenues from these fees will enable three to four smaller and lower-priced houses per year to be preserved for affordable housing, as well as investments in other affordable housing developments. Implementation of this plan requires approval from the Massachusetts Legislature, and a subsequent Town Meeting article to approve a specific bylaw.***

**Finance Committee recommends no action.  
 Select Board will make its recommendation at Town Meeting.**

**BY PETITION REQUEST TO FUND LIMITED TESTING OF HONEY BEE HIVES FOR NEONICOTINOID LEVELS**

**ARTICLE 50.** To determine whether the Town will vote to appropriate the sum of \$4,000, or any other sum, to be expended by the Select Board’s Pollinator Health Advisory Committee under the direction of the Select Board to compare the level of neonicotinoids in ten or fewer honey bee colonies up to five of which have collapsed and five which have survived, or take any other action relative thereto.

***PETITIONER’S EXPLANATION: At last year’s town meeting the Select Board committed to setting up a Pollinator Health Advisory Committee. The driving force behind the creation of this committee is the concern of beekeepers and environmentalists about a possible link between neonicotinoids and the loss of honey bee populations as well as the decline in other pollinators.***

***This year beekeepers in Concord and neighboring towns have seen strong hives dying in the fall whereas smaller hives are surviving. The problem is being blamed on Varroa mites, however, there is also a possible connection between the mites and pesticide levels. Testing for neonics is expensive. Testing requires a mass spectrometer and costs typically \$400 per test. The purpose of this funding is to enable the committee to conduct a limited number of these tests.***

***To qualify to participate in this study, beekeepers will report to the Pollinator Health Advisory Committee findings of their mite monitoring and results of their mite control actions for each of their colonies as they are accomplished during the summer of 2017. The tests will be made on selected failed hives next fall/winter/spring and healthy over-wintered hives in the spring of 2018. Test results will be published.***

**No Motion is expected.**

**CONCORD’S ENERGY GOALS**

**ARTICLE 51.** To determine whether the Town, informed by the Paris Climate Agreement of 2015, will vote to align the energy goals of the Town of Concord with:

(a) the Massachusetts Global Warming Solutions Act of 2008 to achieve a minimum 25% town-wide reduction in Green House Gas (GHG) emissions by 2020 and an 80% reduction by 2050 from the baseline established in 2008; and

(b) by 2030, as an intermediate goal, direct CMLP to reduce the GHG emissions of its power supply portfolio and to offset any residual GHG emissions of its electricity supply through the purchase of RECs or other offsets;

and further,

to determine whether the Town will vote to raise and appropriate or transfer from funds available in the Treasury, the sum of \$100,000, or any other sum, to be expended under the direction of the Town Manager for the purpose of engaging one or more consultants for the purpose of developing and making publicly available an operational plan to achieve said goals; and further, to see if the Town will vote to raise and appropriate or transfer from available funds in the Treasury, the sum of \$100,000, or any other sum, to be expended under the direction of the Town Manager for the purpose of hiring a Director of Energy, on an on-going basis, to be accountable to the Town Manager for recommending policy and measuring progress toward meeting these goals and implementing the operational plan, as well as tracking and assessing new energy technologies and funding opportunities, or take any other action relative thereto.

*The Energy Future Task Force, charged by the Select Board in February 2016 to create a framework for an energy and sustainability plan for a low-carbon future in Concord, has recommended the following actions in this warrant article: to set a bold goal to reduce town-wide greenhouse gas (GHG) emissions to align with the Massachusetts 2008 Global Warming Solutions Act; to reduce GHG emissions of CMLP’s electricity supply; to allocate funds to be expended under the direction of the Town Manager for the purpose of engaging a Director of Energy on an on-going basis to recommend policy and measure progress toward meeting these goals; and to allocate funds to be expended under the direction of the Town Manager for the purpose of engaging one or more consultants to advise the Town Manager and Director of Energy on the development of an implementation plan to achieve these goals.*

**Finance Committee will make its recommendation at Town Meeting.  
Select Board will make its recommendation at Town Meeting.**

**UNPAID BILLS**

**ARTICLE 52.** To determine whether the Town will vote to raise and appropriate or transfer from available funds in the Treasury, monies to pay the unpaid bills of prior fiscal years, or take any other action relative thereto.

*If there are unpaid bills of a prior fiscal year, state law requires that such bills be presented to the Town Meeting.*

**No Motion is expected.**

**LIGHT PLANT EXPENDITURES & PAYMENT IN LIEU OF TAXES**

**ARTICLE 53.** To determine whether the Town will vote that the income from sales of electricity and from servicing and jobbing during the ensuing fiscal year, together with the balance of operating cash in the Light Plant Fund, be expended without further appropriation under the direction and control of the Town Manager for the expenses of the Light Plant for said fiscal year, as defined in Section 57 of Chapter 164 of the Massachusetts General Laws; and/or for other plant extensions, enlargements, additions, renewals and reconstruction; and further, to authorize a transfer of \$474,000, or any other sum, from the Operating Fund of

the Light Plant to be used by the Board of Assessors to reduce the tax levy for the fiscal year ending June 30, 2018; or take any other action relative thereto.

*This article authorizes the Town Manager, as Manager of the Light Plant, to expend the income received by the Light Plant from the sale of electricity along with other departmental income to be used for the purposes of operating the department for the Fiscal Year. This is a routine annual action. Further, this article authorizes the transfer of \$474,000 from the Operating Fund of the Light Plant to the General Fund, an amount consistent with past years and designed to represent what a private utility would pay in property taxes. The amount is based upon a relationship to the Light Plant's sales revenue.*

**Finance Committee recommends affirmative action in the amount of \$474,000.  
Select Board recommends affirmative action in the amount of \$474,000.**

**SOLID WASTE DISPOSAL FUND EXPENDITURES**

**ARTICLE 54.** To determine whether the Town will vote that the income from user fees for solid waste disposal services, associated services, and jobbing services by Concord Public Works during the ensuing fiscal year, together with the balance of operating cash in the Solid Waste Disposal Fund, be expended without further appropriation under the direction and control of the Town Manager in accordance with the Motion passed under Article 27 of the 1989 Annual Town Meeting, or take any other action relative thereto.

*Pursuant to Article 27 of the 1989 Annual Town Meeting, this article authorizes the Town Manager to use cash on hand in the Solid Waste Disposal Fund and user fee revenue in fiscal year 2018 to be used to operate the Town's "pay-as-you-throw" curbside solid waste and recycling collection and disposal program. The Program consists of two major components: curbside collection and disposal including recycling and Drop-Off Days; and the operation and maintenance of the Town's composting site including the former landfill. This has been a routine annual action.*

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**SEWER SYSTEM EXPENDITURES**

**ARTICLE 55.** To determine whether the Town will vote that the income from user fees, special service fees and jobbing services by the Water and Sewer Division of Concord Public Works during the ensuing fiscal year, together with the balance of operating cash in the Sewer Fund be expended without further appropriation under the direction and control of the Town Manager in accordance with the Motion passed under Article 37 of the 1976 Annual Town Meeting, or take any other action relative thereto.

*Pursuant to Article 37 of the 1976 Annual Town Meeting, this article authorizes the Town Manager to use cash on hand in the Sewer Fund and fiscal year 2018 revenue for the operation and maintenance and improvement of the Town's sewer system. Similar to the Town's Water and Light Plant Funds, the Sewer Fund is an enterprise fund. The entire cost of operations, maintenance, and capital replacement and renewal is funded by user fees. At the present time approximately one-third of Concord's residences and many businesses and institutions are connected to the Town's municipal sewer system. This has been a routine annual action.*

**Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.**

**SEWER IMPROVEMENT FUND EXPENDITURES**

**ARTICLE 56.** To determine whether the Town will vote that the income from sewer improvement fees during the ensuing fiscal year, together with the balance of operating cash in the Sewer Improvement Fund, be expended without further appropriation under the direction and control of the Town Manager in accordance with the Motion passed under Article 25 of the 1989 Annual Town Meeting and applicable state enabling statutes, or take any other action relative thereto.

*Pursuant to Article 25 of the 1989 Annual Town Meeting, this article authorizes the Town Manager to use cash on hand in the Sewer Improvement Fund (a sub-fund within the Sewer Fund) and fiscal year 2018 fees for constructing and expanding the Town's sewer lines and treatment facility capacities. Sewer improvement fees are charged to certain properties connecting to the sewer system. This has been a routine annual action.*

Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.

#### **WATER SYSTEM EXPENDITURES**

**ARTICLE 57.** To determine whether the Town will vote that the income from user fees, special service fees, and jobbing services by the Water and Sewer Division of Concord Public Works during the ensuing fiscal year, together with the balance of operating cash in the Water Fund, be expended without further appropriation under the direction and control of the Town Manager in accordance with the Motion passed under Article 38 of the 1974 Annual Town Meeting, or take any other action relative thereto.

*Pursuant to Article 38 of the 1974 Annual Town Meeting, this article authorizes the Town Manager to use cash on hand in the Water Fund and fiscal year 2018 revenue for the operation and maintenance and improvement of the Town's water system. Similar to the Town's Sewer and Light Plant Funds, the Water Fund is an enterprise fund. The entire cost of operations, maintenance, and capital replacement and renewal is funded by user fees. Almost all of Concord's residences and businesses/institutions are connected to the Town's municipal water system. This has been a routine annual action.*

Finance Committee recommends affirmative action  
Select Board recommends affirmative action.

#### **BEEDE SWIM & FITNESS CENTER ENTERPRISE FUND EXPENDITURES**

**ARTICLE 58.** To determine whether the Town will vote to appropriate the amount required for the total expenses of the Community Pool Enterprise Fund for the fiscal year beginning July 1, 2017 (FY2018) for the operation of the Community Pool, in accordance with Chapter 44, section 53F½ of the Massachusetts General Laws, said funds to be expended under the direction of the Town Manager, or take any other action relative thereto.

*In April 2016, Town Meeting appropriated an FY17 operating budget of \$2,687,600 (\$2,392,542 from estimated revenues, \$295,058 from the undesignated Fund Balance) and a capital budget of \$345,000 (funded from the undesignated fund balance). The FY18 budget will be submitted by the Town Manager and reviewed at a public hearing on March 20, 2017.*

Finance Committee recommends affirmative action.  
Select Board recommends affirmative action.

Hereof fail not and make due return of this Warrant with your doings thereon, to the Town Clerk, at or before the time of meeting aforesaid. Given under our hands this 12<sup>th</sup> day of January in the year two thousand-seventeen.

\_\_\_\_\_  
Michael Lawson, Chair

\_\_\_\_\_  
Jane Hotchkiss

\_\_\_\_\_  
Alice Kaufman

\_\_\_\_\_  
Thomas McKean

\_\_\_\_\_  
Steven Ng

SELECT BOARD

Commonwealth of Massachusetts Middlesex, ss.

Concord \_\_\_\_\_  
*Date*

By virtue of this warrant I have notified the legal voters of the Town of Concord to meet at the times and places and for the purposes within named as directed.

\_\_\_\_\_  
Constable of Concord

### **ATTENTION CITIZENS**

The Town of Concord depends upon the immense talent pool possessed by our citizens and we are always seeking interested townspeople to serve on citizen boards and committees, and also to carry out short-term projects. If you are willing to serve your Town on a voluntary basis and desire to participate in shaping the Town's future, please indicate your interest by filling out a "Green Card". Green cards are short forms for listing your areas of interest and any skills relevant to committee or project participation. The form is reproduced on the following page. You may fill it out, and return it to the Administrative Assistant to the Select Board in the Town House. Additional copies of the form are also available at the Town House, or will be mailed upon request (call 978-318-3001 or 978-318-3000).

You will find the Town Report useful for information on specific activities and responsibilities of the various boards and committees. For further information or to discuss your participation in town government in more detail, please feel free to talk with any member of the Select Board.

Please understand that, happily, we often have more interested citizens than vacancies on particular committees. For that reason, you may find that you may not be matched up immediately or matched up with a committee that is your top priority. Nonetheless, your indication of interest is strongly encouraged and appreciated.

**COMMITTEE LISTING**

**KEY:** + APPOINTED BY MODERATOR  
 = APPOINTED BY SELECT BOARD  
 # APPOINTED BY TOWN MANAGER WITH APPROVAL OF THE SELECT

BOARD

\* APPOINTED BY TOWN MANAGER

=	AGRICULTURAL COMMITTEE
=	BOARD OF APPEALS
#	BOARD OF ASSESSORS
=	BRUCE FREEMAN RAIL TRAIL COMMITTEE
*	CEMETERY COMMITTEE
#	COMMITTEE ON DISABILITY
=	COMMUNITY PRESERVATION COMMITTEE
#	COMPREHENSIVE SUSTAINABLE ENERGY COMMITTEE
=	CONCORD CULTURAL COUNCIL
*	CONCORD MUNICIPAL LIGHT BOARD
*	COUNCIL ON AGING BOARD
+	FINANCE COMMITTEE
=	HANSCOM FIELD ADVISORY COMMISSION REPRESENTATIVE & ALTERNATE
*	BOARD OF HEALTH
#	HISTORICAL COMMISSION
=	HISTORIC DISTRICTS COMMISSION
=	HUGH CARGILL TRUST COMMITTEE
=	LIBRARY COMMITTEE
=	MASSPORT COMMUNITY ADVISORY COMMITTEE
*	MAPC REPRESENTATIVE
=	MBTA REPRESENTATIVE
+	MINUTEMAN REGIONAL TECHNICAL HIGH SCHOOL REPRESENTATIVE
#	NATURAL RESOURCES COMMISSION
=	PERSONNEL BOARD
=	PLANNING BOARD
=	PUBLIC CEREMONIES & CELEBRATIONS COMMITTEE
*	PUBLIC WORKS COMMISSION
=	RECORDS & ARCHIVES COMMITTEE
*	RECREATION COMMISSION
=	BOARD OF REGISTRARS
*	RETIREMENT BOARD
=	TAX FAIRNESS COMMITTEE
=	TAX RELIEF COMMITTEE
=	TRUSTEES OF TOWN DONATIONS
=	2229 MAIN STREET COMMITTEE
=	WHITE POND ADVISORY COMMITTEE
=	YOUTH COORDINATOR ADVISORY BOARD

