

**Sherborn, Massachusetts**

# **Annual Town Meeting**

**April 25, 2023**

◆ Please bring this notice with you to the meeting ◆

Middlesex ss:

To either of the Constables of the Town of Sherborn in said county GREETINGS;

In the name of the Commonwealth of Massachusetts you are hereby directed to notify and warn the inhabitants of Sherborn qualified to vote in Town Meeting to meet in the LINDQUIST COMMONS at DOVER-SHERBORN REGIONAL DISTRICT HIGH SCHOOL in DOVER, MASSACHUSETTS on Tuesday, April 25, 2023, at 7:00PM, at LINDQUIST COMMONS and to be adjourned, if necessary, to Wednesday, April 26, 2023, in the DOVER-SHERBORN REGIONAL DISTRICT HIGH SCHOOL, GYMNASIUM to act on the following ARTICLES:

### **Sherborn Advisory Committee:**

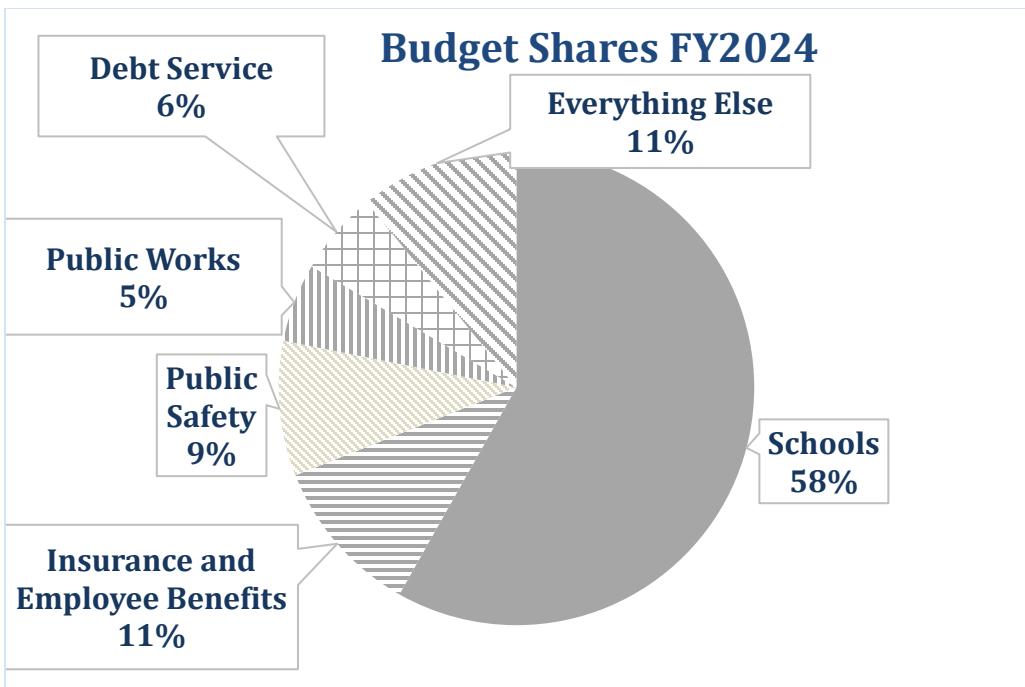
Our financial situation remains under control as the Town has faced varied crosscurrents. The pandemic and its associated budget effects are receding; inflation remains high though lower than its peak in 2022; property prices—which have increased rapidly—now seem to be flattening out; and debt service and other demands continue to pressure the budget. These developments have complicated budget setting and have led to a mix of positive and negative changes to the Town’s financial situation. The rest of this opening note highlights the financial implications of these factors.

#### ***The FY2023 Tax Rate***

For FY2023, the Town’s tax rate decreased further to \$18.01 per \$1,000 of assessed value, down from a high of \$20.57 in 2016 and \$19.03 in 2022. The stepdown in FY2023 largely reflected the sizable increase in property values. While the lower tax rate is good news, we offer two caveats. First, while the tax rate fell further in FY2023, the tax bill on the average-value single-family home in Town (\$990,663) rose by just over \$1,000 as pressures from inflation, debt service, and other factors pushed the Town’s outlays higher. Second, as discussed further below, we are unlikely to see further significant declines in the tax rate, and there are reasons to believe that it will be trending up in future years.

#### ***The FY2024 Operating Budget***

Before digging into budget details, it is worth recalling some basic facts about the budget. As illustrated in the nearby chart, schools comprise about 60% of the budget, with a little over 30% consisting of Insurance and Employee Benefits, Public Safety (primarily Police, Fire, and Ambulance services), Public Works, and Debt Service. The remainder of the Town’s budget accounts for just over 10%.



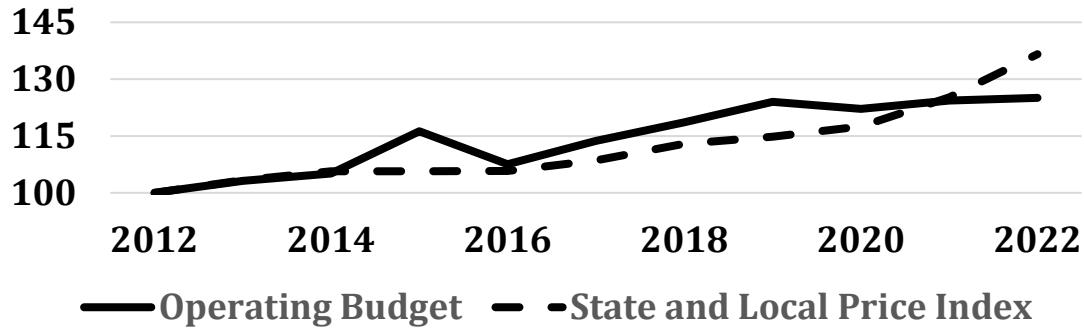
For FY2024, the Omnibus Budget presented in this report represents a 6.0% increase over FY2023. This increase reflects many of the factors noted above. One overarching factor is that the Consumer Price Index rose 6.0% during the twelve months through February of this year, putting upward pressure on many categories of outlays in the proposed budget. In terms of employee compensation, newly negotiated amounts for contract employees are reflecting these inflationary pressures, and the budget includes a cost-of-living increase of 4.5% for non-contract employees as recommended by the Advisory Committee. This gain is broadly in line with increases in national compensation indexes for state and local employees, but still is below the recent inflation rates that have affected everyone. In addition, costs for electricity and natural gas, as well as those for materials, are up considerably.

The School budget for FY2024 also has increased noticeably. For the high school and middle school, the fraction of Sherborn students jumped and that boosts the increase in our assessment well above the 3.5% overall budget increase for these schools. For Pine Hill and out-of-district (OOD) costs for special education students in Sherborn, the big budget increase reflects additional costs for OOD placements. These placements shifted toward higher cost schools, and the state approved a very large tuition increase for some of these schools.

Costs for debt service also move up somewhat further in the FY2024 budget following a big jump in FY2023. These higher costs reflect the burden of previously-approved large capital projects, including the Pine Hill Lane project approved in 2022 (\$1.6 million) and the Library project. While everyone is excited and delighted that the library is open, the cost as of January 2023 is \$14.6 million, with the final amount depending on the outcome of litigation. Debt service associated with these projects, along with some sizable capital projects on the five-year capital plan, point to ongoing budget pressure from this source.

To provide perspective on the recent figures, we note that increases in Town spending during the past 10 years has been relatively controlled, running about in line with inflation. Indeed, as shown in the nearby chart, the Town's operating budget has risen broadly in line with a U.S. government published price index that reflects costs of all things State and Local governments purchase. Put another way, the Town's budget has remained relatively constant after adjusting for inflation over this period.

## Operating Expenses and State & Local Govt Price index (indexed to 100 in 2012)



Source: Budgets from DLS Gateway. Price Index from the U.S. Bureau of Economic Analysis.

### ***Looking Ahead***

Budget pressures can reasonably be expected to increase in future years. These pressures are likely to appear in two dimensions. First, the tax rate can be expected to rise. This outcome reflects that additions to the tax base ("new growth") are likely to be limited—with no larger housing or commercial projects on the horizon—and large increases in property values are unlikely to be repeated in coming years. Second, the inflation-fueled increases in the budget last year and this year are pushing the Town closer to Proposition 2-1/2 limits, which increase 2-1/2% a year plus adjustments for new growth and excluded debt. The combination of rising tax rates and the possible constraint of Prop 2-1/2 limits are likely to sharpen the focus on establishing budget priorities in future years.

*Dan Sichel, Chair  
Peter Gallitano  
Nora Lynch Smith*

*Steven Tsai, Vice Chair  
Stephen Geremia  
Natalie Weare*

*Wassim Bassalee  
Jane Materazzo  
Michael Winters*



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## Town Election

**Tuesday, May 9, 2023**

**Town Hall**

**7:00 a.m. to 8:00 p.m.**

From the Moderator:

## Town Meeting Procedures

The New England town meeting is considered by many to be a model of democratic process. To achieve this, the moderator follows procedures that combine general laws of the Commonwealth, Sherborn by-laws, and rules of conduct developed by Sherborn's moderators over many years. By consistent application of these rules, our town meetings move smoothly, often expeditiously, and with the participation of all who wish to be heard.

### ***Motions***

- All motions and amendments must be within the scope of the article under consideration.
- The Moderator will always recognize a member of the Advisory Committee for the main motion on each article.
- Non-routine motions (such as amendments) must be in writing for the clerk's record.

### ***Conduct of Debate***

- You must be recognized by the Moderator.
- Once recognized, use one of the available microphones, and, before proceeding, state your name and address for the Clerk's record.
- Your comment should be specific to the substance of the motion on the floor.

### ***Voting***

- Voting will be done using electronic handsets. Voters will have 10 seconds from the instruction of the Moderator to record their votes, and the results of each vote will be displayed on the screen at the front of the auditorium. The Moderator will explain the voting process in detail at the start of the meeting and there will be a test run to ensure that all handsets are performing correctly.

### ***Consent Calendar***

We intend to present the following articles as Consent Calendars:

- Articles #1 plus Articles #3 - #6
- Articles #20- #23

The purpose of a Consent Calendar is to save time by dispensing with separate motions and separate votes on articles that can be expected to pass unanimously or nearly unanimously. These articles are: routine in nature; similar articles have passed unanimously or nearly unanimously in the past; and these articles are clearly explained in the *Advisory Committee Report*.

As always, any voter may call a "hold" on an article in a Consent Calendar and the Moderator will remove the article from the Calendar and it will be voted separately.

# Recommendations on Warrant Articles

## **ARTICLE 1. ANNUAL REPORTS**

To hear and act on the reports of the various Town Officers and Committees as contained in the Annual Town Report or otherwise presented. (*Select Board*)

**Advisory Committee:** A copy of the Annual Town Report is posted on the Town's website and hard copies are available to those residents who request them. Copies of this Report are also available for inspection and copying at Town Hall so that all interested citizens may review the contents of this comprehensive document. This article requests that residents accept delivery, in some form as described above, of the Annual Town Report; it does not ask residents to take any action based on its contents.

**We recommend favorable action. (8-0)**

## **ARTICLE 2. FY23 SUPPLEMENTAL APPROPRIATIONS (CURRENT FISCAL YEAR)**

To see if the Town will vote to raise and appropriate or transfer from available funds a sum of money, and if so, what sum, for the purpose of supplementing the various line items of the Town's Fiscal Year 2023 budget, previously voted by the Town under Article 10 of the Warrant for the 2022 Annual Town Meeting or take any other action relative thereto. (*Select Board for the Advisory Committee*)

**Advisory Committee:** This article provides additional funding for unanticipated expenses that are now projected to be incurred in specific line items of the Town Fiscal Year 2023 Budget. The total supplemental requested is \$376,000. The specific amounts are as follows: snow and ice removal (\$16,000); Ambulance Services (\$60,000); Special Education expenses (\$300,000 funded with \$250,000 of Free Cash and a \$50,000 transfer from the Special Education Stabilization Fund). The snow and ice amount is less than in some prior years while the Ambulance and Special Education amounts are higher. The supplemental for Ambulance service reflects unanticipated additional expenses, while the Special Education supplemental reflects, as noted, unanticipated additional costs for out-of-district placements for Sherborn students.

**We recommend favorable action. (8-0)**

## **ARTICLE 3. OTHER POST-EMPLOYMENT BENEFITS OPEB LIABILITY TRUST FUND**

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum of money, and if so, what sum, for the purpose of funding the Other Post-Employment Benefits (OPEB) Liability Trust Fund or take any other action relative thereto. (*Select Board for the Advisory Committee*)

**Advisory Committee:** When eligible employees of the Town of Sherborn retire, they are entitled to receive OPEB (other post-employment benefits) such as healthcare and life insurance. These benefits accrue every year that an eligible employee works for the town, and so every year the town accrues a future OPEB liability to its employees. To meet this eventual liability the town periodically appropriates monies into an OPEB liability trust fund where it can be invested and grow over time. Funds in the OPEB trust fund are managed prudently as required by Massachusetts law.

Our town, like many others in the Commonwealth, has underfunded its OPEB obligations over the years and the growth of the OPEB liability trust fund has not kept up with that of healthcare costs or life expectancies. This article gives the town an important tool to continue to bridge that gap. To that end, we propose transferring \$100,000 from Free Cash to the OPEB Trust Fund.

**We recommend favorable action and that \$100,000 be transferred from Free Cash to the OPEB Liability Trust Fund. (8-0)**

## **ARTICLE 4. CEMETERIES**

To see if the Town will vote to raise and appropriate or transfer from available funds, a sum of money, and if so, what sum, to be used pursuant to M.G.L. Chapter 114, Section 15, for the improvement or embellishment of the cemeteries throughout the Town; for the care, preservation or embellishment of any lot or its appurtenances therein or take any other action relative thereto. (*Select Board for the Cemetery Commission*)

**Advisory Committee:** This article, funded by revenues generated by the sale of cemetery lots, requests \$43,000 be transferred from the Cemetery Enlargement Fund for the care, improvement, embellishment and enlargement of the cemeteries throughout the Town.

**We recommend favorable action. (8-0)**

## **ARTICLE 5. REVOLVING FUNDS**

To see if the Town will vote to set the Fiscal Year 2024 spending limit for each of the Revolving funds set forth in Chapter 28 of the General Bylaws, pursuant to the provisions of M.G. L. Chapter 44, Section 53E ½ or take any other action relative thereto. *(Select Board for the Advisory Committee)*

<b>Revolving Funds</b>	<b>FY2024 Proposed</b>
Council on Aging Programs	\$ 75,000.00 Limit
Board of Health Immunization Clinic	\$ 20,000.00 Limit
Town Forest Sale of Firewood	\$ 35,000.00 Limit
Farm Pond	\$160,000.00 Limit
Ambulance	\$205,000.00 Limit
Elder Housing	\$400,000.00 Limit
Recreation	\$250,000.00 Limit
DPW, Fire & Police Surplus Equipment	\$ 50,000.00 Limit
<b>Total</b>	<b>\$1,195,000.00 Limit</b>

**Advisory Committee:** A revolving fund is used to accumulate fees paid for specific Town Services and then those funds are used to pay related expenses. Revolving funds allow activities carried out by certain agencies and committees to be self-sustaining without the need for an annual operating budget appropriation, although the Town sets each fund's spending limits. The Council on Aging (COA) receives fees that it uses to provide home-delivery meals, transportation, and activities programs for Sherborn seniors. The Board of Health (BOH) operates a revolving fund for receipts paid and reimbursements received during the operation of the BOH sponsored immunization clinics. The Town Forest Committee receives fees from the sale of firewood. Farm Pond receives fees from the sale of stickers and boat permits. Elder Housing receives rents for the units at Woodhaven. Recreation receives fees from rental of its fields and from fees charged to participants in its various programs. The DPW, Fire and Police Surplus Equipment fund receives fees and receipts in connection with the sale of surplus equipment and materials. The Ambulance Revolving Fund receives revenues for services provided. Its limit was reduced from prior years. This change is a result of an update to the accounting for ambulance expenses. Previously, all ambulance expenses—including those charged to the operating budget—were run through the revolving fund. Now, the part of expenses not covered by the estimated revenues in the revolving fund will be charged directly to the operating budget.

**We recommend favorable action to authorize the use of these existing revolving funds at the limits specified in the Warrant. (8-0)**

## **ARTICLE 6. STABILIZATION FUNDS**

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum of money, and if so, what sum, to Stabilization Funds or take any other action relative thereto.

*(Select Board for the Advisory Committee)*

**Advisory Committee:** The purpose of Sherborn's General Stabilization Fund and Capital Stabilization Fund is for the Town to put aside funds for future uses. These funds are an important component of the Town's total cash reserves, which support Sherborn's municipal bond rating. We recommend that:

- \$50,000 of Free Cash to be transferred to the General Stabilization Fund to ensure the Town's future fiscal sustainability and toward the attainment of a best-practice target balance of 3% of the budget.
- \$155,000 of Free Cash to be transferred to the Capital Stabilization Fund to be available for future capital needs.

**We recommend favorable action, and that \$50,000 be transferred from Free Cash to The General Stabilization Fund and \$155,000 be transferred from Free Cash into the Capital Stabilization Fund. (8-0)**

## **ARTICLE 7. FY24 OMNIBUS BUDGET (NEXT FISCAL YEAR)**

To see if the Town will vote to raise and appropriate, or transfer from available funds, such sums of money, for any and all Town expenses and purposes, including debt and interest; and to provide for a Reserve Fund; and to fix the salaries and compensation of all elected Officers of the Town as required by M.G.L. Chapter 41, Section 108; and to determine whether such salaries or compensation shall be made effective from July first of the current year; and to provide for the payment of, and raise or appropriate money for, any salary and compensation so voted or take any other action relative thereto. (*Omnibus Budget, Select Board for the Advisory Committee*)

**Advisory Committee:** The proposed FY2024 Omnibus Budget represents a 6.0% increase over the previous year. As noted in the Introductory Letter, shifts in school budgets are an important factor boosting the FY2024 budget. Indeed, of the 6.0% increase in the FY2024 operating budget, higher school expenses account for 4.3 percentage points. Elsewhere, higher employee compensation accounts for about an additional 0.7 percentage point, reflecting the 4.5% COLA recommended for non-contract employees, the scheduled increases in the Collective Bargaining Agreements for contract employees, and higher benefits costs. Of the remainder, about 0.3 percentage point owes to an increase in Debt Service.

**We recommend favorable action. (8-0)**

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET NUMBER	DESCRIPTION	FY 2020	FY2021	FY 2022	FY2023	FY2024 Advisory Recommendation
		Actual (1)	Actual (1)	Actual (1)	Budget	
(1) Expended Amounts Include Encumbrance, Reserve transfers & ATM Article for Supplements						
<u>GENERAL GOVERNMENT</u>						
<u>SELECT BOARD</u>						
122	SELECT BOARD-SALARIES	267,375	279,474	365,898	294,521	333,620
122	SELECT BOARD-EXPENSES	117,220	192,529	38,156	36,000	27,800
176	ZONING BOARD OF APPEALS - EXPENSE	977	745	1,103	1,100	1,100
	SELECT BOARD TOTAL	385,572	472,748	405,157	331,621	362,520
<u>LEGAL COUNSEL</u>						
151	LEGAL COUNSEL	206,755	235,155	264,087	80,000	80,000
<u>ASSESSORS</u>						
141	ASSESSORS-SALARIES	115,729	116,264	124,177	131,303	142,115
141	ASSESSORS-EXPENSES	12,029	19,018	26,735	26,915	17,815
	ASSESSORS TOTAL	127,758	135,282	150,912	158,218	159,930
<u>TREASURER</u>						
145	TREASURER-SALARIES	64,385	79,761	77,057	85,227	88,723
145	TREASURER-EXPENSES	8,629	11,178	10,671	12,150	11,600
	TREASURERS TOTAL	73,014	90,939	87,728	97,377	100,323
<u>COLLECTOR</u>						
146	COLLECTORS-SALARIES	113,338	118,501	129,385	136,116	141,123
146	COLLECTORS-EXPENSES	17,242	18,322	12,785	19,785	17,150
	COLLECTORS TOTAL	130,580	136,823	142,170	155,901	158,273
<u>FINANCE DEPT/ ACCOUNTING</u>						
135	ACCOUNTANT - SALARIES	210,368	221,375	190,810	226,489	235,776
135	ACCOUNTANT - EXPENSES	87,446	99,938	99,589	101,500	92,000
	FINANCE DEPT / ACCOUNTING TOTAL	297,814	321,313	290,399	327,989	327,776

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET	DESCRIPTION	FY 2020	FY2021	FY 2022	FY2023	FY2024 Advisory Recommendation
NUMBER		Actual (1)	Actual (1)	Actual (1)	Budget	
<b>ADVISORY COMMITTEE</b>						
131	ADVISORY-SALARIES			500	500	523
131	ADVISORY-EXPENSES	1,634	5,541	3,220	4,000	3,977
		1,634	5,541	3,720	4,500	4,500
<b>CONSERVATION COMMISSION</b>						
171	CONSERVATION-SALARIES	49,297	44,100	62,784	82,458	92,340
171	CONSERVATION-EXPENSES	8,309	19,704	14,917	15,583	8,449
		57,606	63,804	77,701	98,041	100,789
<b>PLANNING BOARD</b>						
175	PLANNING BOARD-SALARIES	38,715	48,111	48,915	52,683	54,838
175	PLANNING BOARD-EXPENSES	8,101	1,106	1,067	1,570	1,570
		46,816	49,217	49,982	54,253	56,408
<b>TOWN CLERK</b>						
161	TOWN CLERK-SALARIES	119,742	104,321	132,865	148,926	155,050
161	TOWN CLERK-EXPENSES	3,097	6,038	5,138	7,950	9,000
		122,839	110,359	138,003	156,876	164,050
<b>ELECTION &amp; REGISTRATION</b>						
162	ELECTIONS-SALARIES	4,008	3,371	1,986	3,870	3,995
162	ELECTIONS-EXPENSES	12,940	23,604	18,971	21,350	20,950
		16,948	26,975	20,957	25,220	24,945
<b>IT-INFORMATION TECHNOLOGY</b>						
155	IT-SALARIES	-	-	10,400	10,000	20,800
155	IT-EXPENSES	-	-	88,962	98,911	130,400
		-	-	99,362	108,911	151,200
<b>TOWN BUILDINGS</b>						
192	TOWN BUILDINGS-SALARIES	37,253	44,258	20,800	10,400	-
192	TOWN BUILDINGS-EXPENSES	266,295	267,681	318,391	284,634	373,212
		303,548	311,939	339,191	295,034	373,212
<b>SUSTAINABILITY</b>						
196	SUSTAINABILITY -SALARIES	-	-	53,929	68,563	71,375
196	SUSTAINABILITY -EXPENSES	-	-	35	1,260	1,260
		-	-	53,964	69,823	72,635
<b>GENERAL GOVERNMENT TOTAL</b>		1,770,884	1,960,095	2,123,333	1,963,764	2,136,561

Salaries of Elected Officials:

(2a) Collector	(2b) Town Clerk
\$72,790.00	\$72,790.00

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET NUMBER	DESCRIPTION	FY 2020 Actual (1)	FY2021 Actual (1)	FY 2022 Actual (1)	FY2023 Budget	FY2024 Advisory Recommendation
<b><u>PROTECTION OF LIFE AND PROPERTY</u></b>						
POLICE						
210	POLICE-SALARIES	1,748,000	1,752,697	1,877,947	2,061,772	1,956,285
210	POLICE- EXPENSES	131,492	134,897	111,820	137,061	156,140
210	POLICE-EQUIPMENT	54,227	0	0	0	0
	POLICE TOTAL	1,879,492	1,941,821	1,989,767	2,198,833	2,112,425
FIRE & RESCUE						
220	FIRE & RESCUE-SALARIES	287,863	338,915	377,761	427,074	437,540
220	FIRE & RESCUE -EXPENSES	132,370	128,663	154,524	120,800	119,700
	FIRE & RESCUE TOTAL	420,233	467,578	532,285	547,874	557,240
AMBULANCE						
230	AMBULANCE-SALARIES	190,000	265,000	190,000	205,000	232,500
230	AMBULANCE- EXPENSE	0	0	0	0	0
	AMBULANCE TOTAL	190,000	265,000	190,000	205,000	232,500
INSPECTORS						
241	BLDG INSPECTORS-SALARIES	82,594	89,809	95,063	99,495	112,146
241	BLDG INSPECTORS-EXPENSES	2,068	4,414	5,141	14,100	14,956
	INSPECTORS TOTAL	84,662	94,223	100,204	113,595	127,102
<b>PROTECTION OF LIFE &amp; PROP TOTAL</b>		<b>2,574,387</b>	<b>2,768,622</b>	<b>2,812,256</b>	<b>3,065,302</b>	<b>3,029,267</b>

**TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET**

<b>BUDGET</b>	<b>DESCRIPTION</b>	<b>FY 2020</b>	<b>FY2021</b>	<b>FY 2022</b>	<b>FY2023</b>	<b>FY2024</b>
		Actual (1)	Actual (1)	Actual (1)	Budget	Advisory Recommendation
<b><u>SCHOOLS</u></b>						
301	<b>DOVER-SHERBORN REGIONAL SCHOOL DISTRICT</b>					
	Salaries & other Compensations	16,246,705	16,773,776	17,411,668	18,109,716	18,811,625
	Benefits	4,486,424	4,389,620	4,314,045	4,362,750	4,679,050
	Other Expenditures	1,305,687	1,135,232	1,332,502	1,439,197	1,380,315
	Transportation	406,913	776,270	1,016,980	1,030,800	1,039,200
	Building & Ground Expenditures	1,192,921	1,049,253	1,180,205	1,246,150	1,272,950
	Sub-total Operating	23,638,650	24,124,151	25,255,400	26,188,613	27,183,140
	Debt Service	965,800	923,400	876,500	835,200	789,400
	Total Operating Expenses	24,604,450	25,047,551	26,131,900	27,023,813	27,972,540
	Sherborn's Share of Operations	43.37%	44.44%	45.07%	45.20%	46.45%
	Operations Assessed to Sherborn	9,569,088	9,975,891	9,919,499	10,121,290	10,846,079
	Exempt Debt Assessed to Sherborn		404,265	389,429	372,583	363,519
301	<b>D/S REGIONAL ASSESSMENT</b>	9,569,088	9,975,891	9,919,499	10,493,873	11,209,598
302	<b>TRI-COUNTY VOCATIONAL</b>	32,224	33,892	34,967	1,667	19,664
<b><u>SHERBORN SCHOOL</u></b>						
303	<b>SHERBORN SCHOOLS TOTAL</b>	7,174,621	6,589,377	7,014,901	7,327,068	7,925,571
316	<b>NORFOLK AGRICULTURAL &amp; MINUTEMAN</b>	78,786	52,468	24,100	24,572	26,355
<b>SCHOOL TOTAL</b>		<b>16,854,719</b>	<b>16,651,628</b>	<b>16,993,467</b>	<b>17,847,180</b>	<b>19,181,188</b>

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET	DESCRIPTION	FY 2020	FY2021	FY 2022	FY2023	FY2024	
NUMBER		Actual (1)	Actual (1)	Actual (1)	Budget	Advisory Recommendation	
<b>PUBLIC WORKS</b>							
<b>DEPARTMENT OF PUBLIC WORKS</b>							
401	DPW-SALARIES	575,229	531,146	601,972	703,086	689,034	
401	DPW-EXPENSES	623,889	547,660	558,325	495,980	541,980	
	DP&W TOTAL	1,199,118	1,078,806	1,160,297	1,199,066	1,231,014	
<b>SNOW &amp; ICE</b>							
430	SNOW & ICE - SALARIES	35,327	45,824	43,336	34,278	35,649	
430	SNOW & ICE - EXPENSE	145,549	173,960	161,288	53,150	53,150	
	SNOW & ICE TOTAL	180,876	219,784	204,624	87,428	88,799	
<b>STREET LIGHTING</b>							
424	STREET LIGHTING - EXPENSES	24,677	26,891	10,784	10,000	10,000	
	STREET LIGHTING TOTAL	24,677	26,891	10,784	10,000	10,000	
<b>SOLID WASTE</b>							
431	SOLID WASTE-EXPENSES	301,481	352,443	334,626	339,550	344,050	
	SOLID WASTE TOTAL	301,481	352,443	334,626	339,550	344,050	
<b>RECYCLING</b>							
433	RECYCLING EXPENSES	9,183	238	914	3,230	3,230	
	RECYCLING TOTAL	9,183	238	914	3,230	3,230	
<b>CEMETERIES</b>							
491	CEMETERIES-SALARIES	64,160	66,881	79,100	82,500	89,500	
491	CEMETERIES-EXPENSES						
	CEMETERY TOTAL	64,160	66,881	79,100	82,500	89,500	
<b>PUBLIC WORKS TOTAL</b>		1,779,495	1,745,043	1,790,345	1,721,774	1,766,593	

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET	DESCRIPTION	FY 2020	FY2021	FY 2022	FY2023	FY2024
NUMBER		Actual (1)	Actual (1)	Actual (1)	Budget	Advisory Recommendation
<b><u>HEALTH AND HUMAN SERVICES</u></b>						
HEALTH						
512	BOARD OF HEALTH-SALARIES	115,533	130,066	162,115	135,597	150,551
512	BOARD OF HEALTH-EXPENSES	15,038	17,393	11,681	17,476	23,723
		<b>130,571</b>	<b>147,459</b>	<b>173,796</b>	<b>153,073</b>	<b>174,274</b>
COUNCIL ON AGING						
541	COUNCIL ON AGING-SALARIES	86,600	119,038	132,796	138,524	165,783
541	COUNCIL ON AGING-EXPENSES	19,186	17,126	21,866	28,650	28,650
		<b>105,786</b>	<b>136,164</b>	<b>154,662</b>	<b>167,174</b>	<b>194,433</b>
VETERANS						
543	VETERANS-SALARIES	700	700	-	700	730
543	VETERANS-EXPENSES	1,422	1,526	2,488	6,015	6,130
		<b>2,122</b>	<b>2,226</b>	<b>2,488</b>	<b>6,715</b>	<b>6,860</b>
<b>HEALTH &amp; HUMAN SERVICES TOTAL</b>		<b>238,479</b>	<b>285,849</b>	<b>330,946</b>	<b>326,962</b>	<b>375,567</b>
<b><u>CULTURE &amp; RECREATION</u></b>						
LIBRARY						
610	LIBRARY-SALARIES	295,718	299,262	319,640	417,577	428,309
610	LIBRARY-EXPENSES	134,264	152,833	180,700	165,221	176,608
		<b>TOTAL</b>	<b>429,982</b>	<b>452,095</b>	<b>500,340</b>	<b>582,798</b>
RECREATION						
650	RECREATION-SALARIES	75	8,976	14,829	14,650	15,000
650	RECREATION-EXPENSES	8,519	6,024	171	135,350	135,000
		<b>TOTAL</b>	<b>8,594</b>	<b>15,000</b>	<b>15,000</b>	<b>150,000</b>
HISTORICAL COMMISSION						
691	HISTORICAL COMMISSION	700	700	2,500	3,400	2,800
		<b>TOTAL</b>	<b>700</b>	<b>700</b>	<b>2,500</b>	<b>3,400</b>
<b>CULTURE &amp; RECREATION TOTAL</b>		<b>439,276</b>	<b>467,795</b>	<b>517,840</b>	<b>736,198</b>	<b>757,717</b>

TOWN OF SHERBORN FISCAL YEAR 2024 OMNIBUS BUDGET

BUDGET		FY 2020	FY2021	FY 2022	FY2023	FY2024 Advisory Recommendation
NUMBER	DESCRIPTION	Actual (1)	Actual (1)	Actual (1)	Budget	
<b><u>INSURANCE AND EMPLOYEE BENEFITS</u></b>						
945	GENERAL INSURANCE	150,523	162,766	195,500	209,156	248,174
910	EMPLOYEE BENEFITS INCL OPEB & RET	2,832,731	3,352,874	2,732,209	3,152,518	3,310,068 (3)
<b><u>DEBT SERVICE</u></b>						
710	DEBT SERVICE (TOTAL)	1,283,885	1,205,813	1,302,023	1,794,672	1,878,384 (4)
<b><u>RESERVE ACCOUNT</u></b>						
132	RESERVE ACCOUNT	-	-		300,000	300,000
<b>GRAND TOTAL</b>		<b>27,924,379</b>	<b>28,600,485</b>	<b>28,797,919</b>	<b>31,117,526</b>	<b>32,983,519</b>

(3) Employee Benefits include OPEB Appropriation of \$100,000 to be transferred to the OPEB Trust Fund

(4) Debt Service will be offset by the following transfers:

Transfer from Elder Housing Maintenance Revolving \$67,778.13.

Transfer from Fund Balance Reserve Debt Service - MSBA Reimbursement Amortization \$32,412.

Transfer from Fund Balance Reserve Amortized Premium \$485.83.

## **ARTICLE 8. CAPITAL IMPROVEMENT PLAN (FY24 CIP)**

To see if the Town will vote to raise and appropriate, or transfer from available funds, or borrow pursuant to any applicable statute, a sum or sums of money, and if so, what sum or sums, for the purpose of capital expenditures of the Town of Sherborn; and to determine if any amount borrowed under this article shall be contingent upon the passage of a ballot question exempting the amounts required to pay for the bonds from the provisions of Proposition 2 ½ or take any action relative thereto. (*Select Board for Various Departments*)

<b>NO.</b>	<b>LEAD DEPT.</b>	<b>ITEM</b>	<b>AMOUNT</b>
1.	Fire Department	Officer in Charge Vehicle	\$ 55,432
2a.	Police Department	Hybrid Pickup	\$ 62,750
2b.		Electric vehicle/cruiser	\$ 59,300
3a.	DPW	Stormwater (MS4 Compliance)	\$ 170,000
3b.		Roadway Management	\$ 250,000
4.	Select Board	Town Facilities & Infrastructure	\$ 350,000
6.	SSC	Pine Hill – EMS upgrade	\$ 40,000
		<b>Total</b>	<b>\$ 987,482</b>

**Advisory Committee 8.1 – Fire Officer-in-charge vehicle:** Request is to replace a 2016 Ford Explorer that cannot support a mobile data terminal and has other issues. The cost includes a Gear Clear system to help contain hazardous material attached to fire gear from spreading in vehicle when exposed to sunlight and heat.

**We recommend favorable action, and that \$55,432 be transferred from Free Cash to be used for the Fire Department Office in Charge Vehicle. (8-0)**

**Advisory Committee 8.2a – Police Hybrid Pickup:** Request is to replace a 2016 vehicle. A pickup would provide additional capacity for moving gear and equipment. The purchase of a hybrid would be consistent with the Town's sustainability goals.

**We recommend favorable action, and that \$62,750 be transferred from Free Cash to be used for the Police Department Hybrid Pick Up Vehicle. (8-0)**

**Advisory Committee 8.2b – Electric vehicle/cruiser:** Request is to replace a 2017 vehicle. The battery on this new vehicle would be warranted for eight years, longer than the typical five-year effective service life of front-line vehicles. Moreover, the purchase of an electric vehicle would be consistent with the Town's sustainability goals.

**We recommend favorable action, and that \$59,300 be transferred from Free Cash to be used for the Police Department electric vehicle/cruiser. (8-0)**

**Advisory Committee 8.3a - DPW Stormwater (MS4 Compliance):** Mandates by the EPA require infrastructure improvements to comply with regulations and address flooding and analysis of water quality in various areas of the town. The focus of the Storm Water Management Program (SWMP) is to develop an MS4 program which will reduce discharge of pollutants into storm water systems. DPW plans to use requested funds for stormwater permitting following the multi-year project which includes consulting, mapping improvements, increases in inspections within the regulated areas and plans for phosphorous reductions required in the Charles River Watershed areas. Other costs include engineering and legal easement work associated with structural improvements and outfalls, and structural improvements to comply with regulations and address flooding and water quality in various areas of the town.

**We recommend favorable action and that the Treasurer, with the approval of the Select Board, be authorized to borrow up to \$170,000 pursuant to General Laws Chapter 44, Section 7(1) or any other applicable statute; provided however, that this appropriation shall not take effect until the Town votes to exempt from the limitation on total taxes imposed by the General Laws Chapter 59, Section**

**21C(k)(Proposition 2 ½) the amounts required to pay the principal and interest on the bonds and notes authorized by this vote or use free cash. (8-0)**

**Advisory Committee 8.3b - DPW Roadway Management:** The Town continues to adhere to the five-year plan to address the deteriorating roadway network infrastructure. Combined with chapter 90 state funds, the \$250,000 requested funds will be used to address the several streets and roadways in significant disrepair that require significant renovation. These funds are designed to absorb the significant price increase in material and labor due to the current inflationary environment. The plan addresses the cost of improving the worsening conditions vs future cost of repairs to a worsened condition.

**We recommend favorable action and that the Treasurer, with the approval of the Select Board, be authorized to borrow up to \$250,000 pursuant to General laws Chapter 44, Section (7)1 or any other applicable statute; provided however, that this appropriation shall not take effect until the Town votes to exempt from the limitation on total taxes imposed by the General Laws Chapter 59 , Section 21C (k)(Proposition 2 ½) the amounts required to pay the principal and interest on the bonds and notes authorized by this vote. (8-0)**

**Advisory Committee 8.4 – Town Facilities & Infrastructure:** Town buildings capital improvements are based upon a 20-year plan commissioned by the town in 2016 and updated in 2021. This year's \$350,000 request includes improvements to capital assets of the town. The projects envisioned and estimated costs include:

- \$65,000 Town Hall roof replacement and attic insulation
- \$35,000 Town Hall HVAC upgrades
- \$75,000 Transfer Station Electrical Service (Code and Safety Compliance)
- \$130,000 Dry Hydrant System Repairs
- \$45,000 General capital improvements to various Town Facilities and Infrastructure

**We recommend favorable action, and that \$350,000 be appropriated for improvements to Town Facilities and Infrastructure. To meet this appropriation, \$175,000 be transferred from Free Cash to fund Dry Hydrant System Repairs and general capital improvements to various Town facilities and infrastructure and that the Treasurer, with the approval of the Select Board, be authorized to borrow up to \$175,000 pursuant to General laws Chapter 44, Section 7(1) or any other applicable statute to fund the Town Hall roof replacement and attic insulation, the Town Hall HVAC upgrades, and the Transfer Station Electrical Service (Code Safety and Compliance); provided however, that this appropriation shall not take effect until the Town votes to exempt from the limitation on total taxes imposed by the General Laws Chapter 59 , Section 21C (k)(Proposition 2 ½) the amounts required to pay the principal and interest on the bonds and notes authorized by this vote. (8-0)**

**Advisory Committee 8.6 - Pine Hill EMS upgrade:** The requested funds would be used to upgrade Pine Hill School's Energy Management System, which controls and monitors heating and cooling. Upgrading Pine Hill would represent the last leg of the Dover-Sherborn schools' system-wide transition to a modern, integrated system.

**We recommend favorable action, and that \$40,000 be transferred from Free Cash to be used for the Pine Hill EMS (Energy Management System) upgrade. (8-0)**

## **ARTICLE 9. REGIONAL SCHOOL CAPITAL EXPENSE**

To see if the Town will vote to raise and appropriate, transfer from available funds or borrow pursuant to any applicable statute, a sum of money, and if so, what sum, for the purpose of paying the costs of various items of capital equipment and/or improvements for the Dover Sherborn Regional School District, including the payment of expenses incidental and related thereto, pursuant to an intergovernmental agreement with the Dover-Sherborn Regional School District and the Town of Dover/Sherborn to provide funding for such items: and to determine if any amount borrowed under this article shall be contingent upon the passage of a ballot question exempting the amounts required to pay for the bonds from the provisions of Proposition 2 ½, or take any other action relative thereto. *(Board of Selectmen for the Dover-Sherborn Regional School Committee)*

**Advisory Committee:** All seven air handling units at Dover Sherborn High School are due for replacement. All have surpassed their anticipated life. Bids have been obtained, and the anticipated cost is \$1,200,000. Sherborn is responsible for 46.05% of this cost, or \$552,600.

**We recommend favorable action and that the Treasurer, with the approval of the Select Board, be authorized to borrow up to \$552,600 for replacement of seven High School rooftop air handling units pursuant to General laws Chapter 44, Section (7)1 or any other applicable statute; provided however, that this appropriation shall not take effect until the Town votes to exempt from the limitation on total taxes imposed by the General Laws Chapter 59, Section 21C (k)(Proposition 2 1/2) the amounts required to pay the principal and interest on the bonds and notes authorized by this vote. (8-0)**

## **ARTICLE 10. USE OF FREE CASH**

To see if the Town will vote to appropriate from Free Cash a sum of money, and if so, what sum, to meet the appropriations for the ensuing fiscal year; and authorize the Assessors to use said sum in fixing the tax rate or take any other action relative thereto. (*Select Board for the Advisory Committee*)

**Advisory Committee:** This article authorizes additional uses of Free Cash not otherwise specified in this warrant. There are no proposed additional uses of Free Cash for FY24.

**We recommend no action. (8-0)**

## **ARTICLE 11. FUNDING FOR SHERBORN'S 350<sup>TH</sup> ANNIVERSARY CELEBRATION**

To see if the Town will vote to raise and appropriate or transfer from available funds a sum of money and, if so, what sum, to be used by the Town's 350<sup>th</sup> Committee for the purposes of the 350<sup>th</sup> Anniversary Celebration or take any other action relative thereto. (*Select Board*)

**Advisory Committee:** The 350<sup>th</sup> Anniversary Committee is in the process of organizing a year-long celebration of Sherborn's 350<sup>th</sup> in 2024. Their goal is to create a memorable celebration for the community, to share the town's rich history, and to encourage community engagement and pride. The 350<sup>th</sup> Committee is requesting \$10,000 for startup funding to set up a website, distribute communications in various formats, and develop a calendar of events. They are also in communication with Sherborn's legislative reps (Senator Becca Rausch and Representative James Arena-DeRosa) to request additional state funding for the celebration.

**We recommend favorable action, and that \$10,000 be transferred from Free Cash to be used by the Town's 350<sup>th</sup> Committee for the purposes of the 350<sup>th</sup> Anniversary Celebration. (7-0-1)**

## **ARTICLE 12. COMBINED TREASURER/COLLECTOR**

To see if the Town will vote to authorize the Select Board to file a petition with the General Court to obtain special legislation to make the elected office of the Collector an appointed office and further to combine the offices of Treasurer and Collector into one office of Treasurer/Collector, such office to be appointed by the Select Board for a term not to exceed three years; such petition to include such additional provisions as the Select Board deems appropriate or take any other action relative thereto. (*Select Board*)

**Advisory Committee:** A favorable vote on this article enables The Select Board to make the Collector role an appointed position and to combine the Collector and Treasurer into a single office.

Numerous studies and reports on the government operations of the Town of Sherborn have recommended combining the offices of the Treasurer and the Collector. For example, The Financial Management Review completed by the Massachusetts Department of Revenue Division of Local Services of the Town of Sherborn, which is available online at <https://www.mass.gov/doc/sherborn-financial-management-review-may-2012/download> states:

Due to parallel requisite job responsibilities and professional skill-sets, we routinely encourage communities to combine the offices of treasurer and tax collector into a single, appointed position as a way to streamline operations.

Having all receipts collected, counted, posted, deposited and managed in the same office by one individual selected for his or her credentials and experience makes organizational sense.

The primary concern raised by opponents of the article is that having two separate positions is better for maintaining checks and balances. Proponents of the article are of the opinion that having multiple people in the office performing the different duties maintains internal checks and balances while also enabling greater work efficiencies.

**We recommend favorable action to authorize the Select Board to file a petition with the General Court to obtain special legislation to make the elected office of the Collector an appointed office and further to combine the offices of Treasurer and Collector into one office of Treasurer/Collector. (6-2)**

### **ARTICLE 13. AMEND BOARD OF ASSESSORS MEMBERSHIP**

To see if the Town will vote to amend General Bylaws Chapter 3, Section 11 by adding the following:

Notwithstanding any By-Law to the contrary, of the three positions on the Board of Assessors, the Select Board shall appoint one qualified Sherborn resident through a prescribed advertised process. In order to be deemed qualified, any resident candidate must either 1) be a Massachusetts Accredited Assessor, 2) be a Residential Massachusetts Assessor, 3) have been awarded a Certified Massachusetts Assessor certificate by the MAAO, or 4) be able to demonstrate a strong background in finance, law, real estate, appraisal, and/or municipal government. If a qualified resident candidate is not available, then the Select Board is authorized to appoint a qualified non-resident. If at the time of any vacancy, including expiration of a member's term, all remaining members of the Board of Assessors are non-residents, the attempt to hire a Sherborn resident shall be repeated.

Or take any other action relative thereto. (*Select Board*)

**Advisory Committee:** At its 2022 Town Meeting the town of Sherborn voted to change the Board of Assessors from elected to appointed. This could result in there being no Sherborn residents on the Board of Assessors. Proponents of this Article believe there is value in ensuring that at least one of the three assessor positions be held by a Sherborn resident. However, we believe that it is not necessary to appoint a Sherborn resident as an assessor. The role of an assessor requires a high degree of knowledge and skill, is governed by specific laws and regulations, and is more of a "technical" than a policy-making position. We believe that the best assessors are those who are specifically qualified for the job – not those who simply have general experience in finance, law, real estate or municipal government. In addition, we note that since Sherborn residents are likely to have personal knowledge of and relationships with other Sherborn residents whose properties are the subject of cases to come before the Board of Assessors it may be easier for an assessor to maintain arms-length decision making ability if he or she is not a Sherborn resident. Under the town's current bylaw, qualified Sherborn residents are not precluded from serving on the Board of Assessors, and if the best qualified candidates are Sherborn residents then we trust that they will be appointed. But we do not see the benefit of designating one of the three assessor positions as a "Sherborn resident" position if the Sherborn resident is not necessarily the best qualified candidate for the role.

**We recommend no action. (7-1)**

### **ARTICLE 14. LAND ACQUISITION COMMITTEE MEMBERSHIP**

To see if the Town will vote to amend the membership of the Land Acquisition Committee voted at the 1995 ATM & amended at the 2017 ATM as follows:

#### **Proposed LAC membership**

The LAC membership shall include representatives designated by the Select Board, Planning Board, Conservation Commission, ~~Capital Budget Committee~~, Groundwater Protection Committee and Open Space Committee as well as 2 members appointed by the Moderator for terms of 3 years. The LAC may also include participation and seek advice from other Town boards and committees as needed.

Or take any other action relative thereto. (*Select Board for the Land Acquisition Committee*)

**Advisory Committee:** The mission of the Land Acquisition Committee (<https://www.sherbornma.org/land-acquisition>) is to “research and maintain a current inventory of all properties of interest, with a focus on parcels of significant size and parcels of any size facing the loss of Chapter 61 protection and/or parcels of potential value to the Town.” The Land Acquisition Committee is therefore a research and advisory body. Proponents of this article argue that having a representative from the Groundwater Protection Committee is important to determining whether a parcel of land is of importance to the Town. Capital Budget Committee input may not be as important at this stage, though the Capital Budget Committee would be involved at a later stage when a land acquisition proposal is considered.

**We recommend favorable action to change the membership of the Land Acquisition Committee to include a member from the Groundwater Protection Committee instead of a member from the Capital Budget Committee. (8-0)**

## **ARTICLE 15. AMEND CHAPTER 6 CAPITAL BUDGET COMMITTEE**

To see if the Town will vote to amend Chapter 6 of the General Bylaws by deleting in Section 3 the date of February 1 and replace it with December 1 and in Section 5, deleting a cost of ten thousand dollars (\$10,000) and replace it with a cost of twenty-five thousand (\$25,000). (Additions are shown in underlined text and deletions are shown in ~~strikethrough~~ font) such that the paragraphs read as follows:

Section 3. The various Town Boards, Officers and Committees charged with the expenditure of Town money, shall before ~~February 1<sup>st</sup>~~ December 1<sup>st</sup> of each year, prepare and file with the Committee detailed estimates of the amounts deemed by them advisable for the Town to expend for capital projects annually for a period of six years, together with explanatory statements providing such additional information about each proposed capital project as reasonably may be requested by the Committee. (Amended 1973, 2023)

Section 5. For the purpose of this Bylaw, a capital improvement or project shall be a physical betterment or item of equipment having a useful life, of at least five years, and a cost of ~~ten thousand dollars (\$10,000)~~ twenty-five thousand dollars (\$25,000.00) or more. (Amended 1987, 2023)

Or take any other action relative thereto. (*Select Board for the Capital Budget Committee*)

**Advisory Committee:** Section 3: Current timelines do not allow enough time for thoroughly evaluating capital budgets if they are not submitted until February 1. The December 1 date allows more time for a comprehensive assessment. Section 5: Increasing the threshold for a purchase to be considered a capital expense from \$10,000 (originally a number established in 1987) to \$25,000. Indeed, \$10,000 in 1987 would now be worth approximately \$25,000 so this adjustment amounts to keeping up with inflation.

**We recommend favorable action. (8-0)**

## **ARTICLE 16. AMEND GBL – PERSONNEL ADMINISTRATION PLAN – LONGEVITY**

To see if the Town will vote to amend the Personnel Administration Plan of the General Bylaws by adding a new Section 22 Longevity and renumbering the remaining Sections of the Plan to coincide with the new Section, and to appropriate the funds therefor for FY24.

### Section 22: LONGEVITY

#### I. Purpose

The purpose of this Policy is to implement systems and procedures to reward longevity service to the Town of Sherborn *benefited employees* as set out below.

## II. Policy

The compensation is based on years of service to the Town. Any such employee with the following service levels shall be awarded:

Years of Service	Award
5 – 9	\$ 500
10 – 14	\$ 650
15 – 19	\$ 800
20 – 24	\$1,000
25 – 30	\$1,200
30+	\$1,300

This stipend will begin in FY24. It will be divided into 2 biannual payments following the employee's anniversary on September and March first dates. The above-listed amounts of Award shall be adjusted by a cost of living increase percentage each fiscal year after FY24, subject to appropriation. Employees on disability leave will receive longevity pay on the same date as active employees. Employees on unpaid leaves of absence will receive their longevity pay one month after they return to work. Employees who retire during the year between the September and March first pay-out dates will receive pro-rated amounts for the year in which they retire.

## III. Eligibility

Effectively July 1, 2023, benefited employees, who have been employed by the Town continuously for at least five years, are eligible for the Longevity Stipend. A benefited employee is one whose position is included in the approved Town Pay Plan and who is eligible for all employee benefits, including health insurance. Employees under collective bargaining agreement, contract, seasonal employees, supplemental part time, casual part time, and temporary and elected employees are not eligible. For the purposes of longevity calculations, all paid leave, unpaid temporary layoffs, and authorized leave without pay periods of up to three months are included. An elected benefit eligible employee, who moves to a non-elected benefited position with the Town, will have all time serving in benefited employment counted toward longevity.

- A. Periods of disability where some sick or annual leave is used to supplement disability payments are credited to service. If an employee leaves Town employment and then is reinstated or rehired, service time is adjusted to account for the period not worked. The adjusted service date is used to calculate longevity. The employee must have been in pay status for at least half of the calendar year in order to receive longevity pay for the year.
- B. Time spent in a supplemental part time, casual part time, temporary, or seasonal position, and those positions covered by contract or collective bargaining agreements are not eligible to be counted toward longevity. Leave without pay for periods greater than three months is also not eligible to be counted toward longevity.
- C. Twelve eligible calendar months make up a year of service. Four weeks will be counted as one month after all complete years and calendar months have been calculated. Military leaves of absence (including extended tour) will not affect the longevity date.

## IV. Administration

The Town Administrator along with the Director of Human Resources and the Personnel Board is responsible for the administration, revision, interpretation, and application of this Policy.

## V. Amendments

This Policy may, from time to time, be amended by Town Meeting.

Or take any other action relative thereto. (*Select Board for the Personnel Board*)

**Advisory Committee:** This Article provides Longevity payments to non-contract Town employees who have worked for the town for at least 5 years. Longevity payments are an opportunity for the Town to show appreciation to its dedicated and loyal employees. The cost for FY2024 is expected to be less than \$10,000.

**We recommend favorable action. (8-0)**

## **ARTICLE 17. ACCEPT STATE LEGISLATION ALLOWING LOWER SPEED LIMITS.**

To see if the Town will vote to accept MGL c. 90, Section 17C to allow the Select Board to establish lower speed limits of 25 miles per hour inside a thickly settled or business district on any roadway in town that is not a state highway and to accept Section 18B of Chapter 90 of the General Laws to allow the Select Board to establish safety zones with speed limits of 20 miles per hour or take any other action relative thereto. (*Select Board*)

**Advisory Committee:** This article will ultimately provide the Town greater flexibility to maintain and regulate safe, standardized, and appropriate speed limits within the Town. With a focus on thickly settled areas and high pedestrian traffic business areas of downtown, the Select Board will be able to set speed limits that will benefit residents, visitors and all roadway users.

**We recommend favorable action. (8-0)**

## **ARTICLE 18. AMEND ZBL SECTION 5.10 – GROUND MOUNTED SOLAR**

**Full text of the article is not included in this Report to save paper and postage. It is available on the Town's website (<https://www.sherbornma.org/home/news/2023-annual-town-meeting-information-posted-april-4-2023>) and copies will be available at Town Meeting.**

**Advisory Committee:** In their landmark decision on Tracer Lane II Realty, LLC v. City of Waltham on June 2, 2022, the MA Supreme Judicial Court affirmed a Land Court determination that a local prohibition on solar energy systems in a residential zone was improper because Massachusetts law “protects solar energy systems from local regulation that is not necessary to protect the public health, safety or welfare.” In the following months, municipalities across the state have been scrambling to revise their Ground Mounted Solar Bylaws which, like Waltham’s, would be deemed overly restrictive based on the SJC’s decision. Sherborn’s existing Ground Mounted Solar Bylaw is similarly restrictive, allowing such installations only in a very small overlay district. This revision to Sherborn’s bylaw significantly expands the overlay district in which ground mounted solar installations are allowed by right, along existing power line corridors stretching across four miles of the town, and additionally allowing them throughout the remainder of the town by special permit. We recognize that the status of the new bylaws throughout the state remains in flux as they face judicial challenges, and the State attempts to balance solar development against local concerns about limiting deforestation, protecting groundwater resources, and the rights of abutting landowners. As such, it is likely that further revisions to this bylaw may be necessary in future Town Meetings, but we feel it is important to establish this revised bylaw to ensure that Sherborn remains aligned with the state’s priorities while retaining a measure of control over the siting and scale of ground-mounted solar installations.

**We recommend favorable action, contingent on Town Counsel reviewing the final language of the proposed bylaw revision prior to the Annual Town Meeting. (8-0)**

## **ARTICLE 19. AMEND GBL CHAPTER 26 – STRETCH ENERGY CODE**

To see if the Town will vote to remove Chapter 26 Stretch Energy Code of the General Bylaws in its entirety and replace it with the following new Chapter 26, Specialized Stretch Energy Code, for the purpose of regulating the design and construction of buildings for the effective use of energy and reduction of greenhouse gas emissions, pursuant to the entirety of 225 CMR 22 and 23, including Appendices RC and CC, including future editions, amendments or modifications thereto, with an effective date of January 24, 2024, and in support of the Sherborn Climate Emergency Declaration adopted at the 2022 Annual Town Meeting.

### **CHAPTER 26 SPECIALIZED ENERGY CODE (Added 2023)**

#### **Section 1 Definitions.**

**International Energy Conservation Code (IECC)** - The International Energy Conservation Code (IECC) is a building code created by the International Code Council. It is a model code adopted by many state and municipal governments in the United States for the establishment of minimum design and construction requirements for energy efficiency and is updated on a three-year cycle. The baseline energy conservation requirements of the MA State Building Code are the IECC with

Massachusetts amendments, as approved by the Board of Building Regulations and Standards and published in state regulations as part of 780 CMR.

**Specialized Energy Code** - Codified by the entirety of 225 CMR 22 and 23 including Appendices RC and CC, the Specialized Energy Code adds residential and commercial appendices to the Massachusetts Stretch Energy Code, based on amendments to the respective net-zero appendices of the International Energy Conservation Code (IECC) to incorporate the energy efficiency of the Stretch energy code and further reduce the climate impacts of buildings built to this code, with the goal of achieving net-zero greenhouse gas emissions from the buildings sector no later than 2030.

**Stretch Energy Code** - Codified by the combination of 225 CMR 22 and 23 1 , not including Appendices RC and CC, the Stretch Energy Code is a comprehensive set of amendments to the International Energy Conservation Code (IECC) seeking to achieve all lifecycle cost-effective energy efficiency in accordance with the Green Communities Act of 2008, as well as to reduce the climate impacts of buildings built to this code.

## **Section 2 Purpose.**

The purpose of 225 CMR 22.00 and 23.00 including Appendices RC and CC, also referred to as the Specialized Energy Code is to provide a more energy efficient and low greenhouse gas emissions alternative to the Stretch Energy Code or the baseline Massachusetts Energy Code applicable to the relevant sections of the building code for both new construction and existing buildings.

## **Section 3 Applicability.**

The Specialized Energy Code applies to residential and commercial buildings effective on January 1, 2024.

## **Section 4 Specialized Energy Code.**

The Specialized Energy Code, as codified by the entirety of 225 CMR 22 and 23 including Appendices RC and CC, including any future editions, amendments or modifications, is herein incorporated by reference into this Chapter.

The Specialized Code is enforceable by the inspector of buildings or building commissioner.

Or take any action relative thereto. (*Select Board for the Energy & Sustainability Committee*)

**Advisory Committee:** This Article would replace the Stretch Energy Code with the Specialized Stretch Energy Code. The Advisory Committee recognizes the Sherborn Climate Emergency Declaration adopted at the 2022 Annual Town Meeting and the importance of mitigating climate change. However, we note that concerns were raised about the impact passage of this Article may have on housing construction at a time when the Town is seeking to increase revenue in order to avoid future property tax rate increases. Implementing this change before other surrounding towns may make Sherborn less attractive for investment and construction.

## **We recommend no action. (5-3)**

**Minority Report:** The Specialized Stretch Energy Code represents a relatively minor expansion of the Stretch Energy Code as of July 2024, essentially requiring that all new construction homes be wired for full electrification, that larger (>4000 sq.ft.) or less efficient single-family houses have solar panels, and that very large multi-unit buildings be built to Passive House standards. Adopting the Specialized Stretch Energy Code would have no ramifications after July 2024 for current Sherborn residents looking to renovate or expand their existing homes. Opponents of this Article suggest that adopting the Specialized code would have a depressive effect on home values. We fail to see how requiring that homes be built to a higher efficiency standard and be future-proofed for full electrification could serve to reduce home values. If anything, such homes should be equal or higher in value, and the knowledge that all new homes in Sherborn are being built to a higher standard should make it a more appealing location for future homebuyers.

Some have expressed concern that smaller scale home construction operations may find it challenging to build to the Specialized code, yet as noted above the difference between the Specialized code and the town's current code basically amounts to additional electrical wiring throughout the house, which may add 1-2% to the construction cost and which does not require specialized equipment or expertise. Larger or less energy efficient homes may require installation of solar photovoltaic (PV) systems, but solar installers are fairly ubiquitous in Massachusetts, and we doubt prospective buyers of >4000 sq.ft. houses are likely to view the addition of a solar PV system as a negative. Others have also expressed concern

that adopting the Specialized code may dissuade prospective developers of affordable housing, for which there is a significant need in Sherborn. Based on public comments from builders who are Sherborn residents and other information from large-scale developers, we feel that adopting the Specialized code is unlikely to have any effect on developing affordable housing. Many such developments in the State are already being built to Passive House standards. With the considerable financial incentives provided for Passive House construction, these projects often end up cost neutral or lower when compared to conventional construction.

We also feel that the Specialized Stretch Energy Code represents a significant benefit for future homeowners. Houses that are larger or less efficient will have solar PV systems in place, reducing electricity bills. All new construction homes will be pre-wired for full electrification, eliminating the need for major and costly retrofitting over the next two decades as the State mandated Net Zero goal in 2050 approaches. Families who purchase houses built to the Specialized code will greatly appreciate the fact that they chose a town that was proactive in ensuring that new construction would be future-proof in meeting the Net Zero goals.

At the 2022 Annual Town Meeting, the town voted to declare a Climate and Ecological Emergency and to take “further action to achieve net-zero greenhouse gas emissions as soon as is fiscally and technologically possible.” Adopting the Specialized Stretch Energy Code would be an important step towards fulfilling the commitment that the town made last year, a step which places no financial burden on current or future taxpayers and does not hinder current homeowners looking to renovate or expand their homes.

## **ARTICLE 20. ACCEPT THE NUMBERING / RE-STYLING OF THE CURRENT GENERAL BYLAWS**

To see if the Town will vote to renumber and recaption and stylize the General Bylaws of the Town by: (a) assigning a chapter number to each of the General Bylaws; (b) renumbering each section of each bylaw accordingly; (c) inserting chapter, article and section titles; (d) updating internal references to reflect the new numbering system; (e) imposing a uniform system of capitalization, including capitalizing “Town” when referring to the Town of Sherborn; (f) citing numbers consistently throughout the bylaws, so that “one” through “nine” are spelled out, while 10 and above, dollar amounts, percents and dates appear in numeric format; and (g) consistently citing state statutes as “MGL c. \_\_\_, § \_\_”; all as set forth in the document on file in the office of the Town Clerk entitled “Bylaws and Regulations of the Town of Sherborn, Massachusetts,” dated March 2023, prepared by General Code, LLC or take any action relative thereto. (*Select Board for the Town Clerk*)

**Advisory Committee:** These changes are not substantive and are administrative in nature as part of the Town’s project to recodify Town bylaws and regulations. This effort will **assure** our bylaws **remain** consistent with Massachusetts laws and will be easily searchable.

**We recommend favorable action. (8-0)**

## **ARTICLE 21. ACCEPT THE NUMBERING / RE-STYLING OF THE CURRENT ZONING BYLAWS**

To see if the Town will vote to renumber and recaption and stylize the Zoning Bylaw of the Town by (a) designating the Zoning Bylaw as Chapter 240 of the new Town Code; (b) renumbering each section of the Zoning Bylaw accordingly; (c) inserting section titles therein, as necessary; (d) updating internal references to reflect the new numbering system; (e) imposing a uniform system of capitalization, including capitalizing “Town” when referring to the Town of Sherborn; (f) citing numbers consistently throughout the bylaws, so that “one” through “nine” are spelled out, while 10 and above, dollar amounts, percents and dates appear in numeric format; and (g) consistently citing state statutes as “MGL c. \_\_\_, § \_\_”; all as set forth in the document on file in the office of the Town Clerk entitled “Bylaws and Regulations of the Town of Sherborn, Massachusetts,” dated March 2023, prepared by General Code, LLC or take any action relative thereto. (*Select Board for the Town Clerk*)

**Advisory Committee:** These changes are not substantive and are administrative in nature as part of the Town’s project to recodify Town bylaws and regulations. This effort will **assure** our bylaws **remain** consistent with Massachusetts laws and will be easily searchable.

**We recommend favorable action. (8-0)**

## **ARTICLE 22. ADOPT HOUSEKEEPING CHANGES TO THE CURRENT GENERAL BYLAWS**

To see if the Town will vote to adopt the changes to the General Bylaws as set forth in Schedule A, General Bylaw Changes, on file in the office of the Town Clerk, in order to correct errors, inconsistencies and conflicts with state law in the bylaws or take any action relative thereto. (*Select Board for the Town Clerk*)

**Advisory Committee:** These changes are not substantive and are administrative in nature as part of the Town's project to recodify Town bylaws and regulations. This effort will **assure** our bylaws **remain** consistent with Massachusetts laws and will be easily searchable.

**We recommend favorable action. (8-0)**

## **ARTICLE 23. ADOPT HOUSEKEEPING CHANGES TO THE CURRENT ZONING BYLAWS**

To see if the Town will vote to adopt the changes to the Zoning Bylaw as set forth in Schedule B, Zoning Bylaw Changes, on file in the office of the Town Clerk, in order to correct errors, inconsistencies and conflicts with state law in the bylaws or take any action relative thereto. (*Select Board for the Town Clerk*)

**Advisory Committee:** These changes are not substantive and are administrative in nature as part of the Town's project to recodify Town bylaws and regulations. This effort will **assure** our bylaws **remain** consistent with Massachusetts laws and will be easily searchable.

**We recommend favorable action. (8-0)**

# Capital Budget Committee Report for Fiscal Year 2024

Coralinda Lincoln (*Chairperson*), Peter Moores, Peter Gallitano, Nora Lynch Smith (*Alternate*)

The duties of the Capital Budget Committee are set forth in Chapter 6 of Sherborn's General By-laws. The Committee, appointed by the Town Moderator, "...shall consider all matters relating to proposed expenditures of money for capital improvements and may make recommendations to the Town and all Town Boards, Officers and Committees with reference to such expenditures." The By-laws define a capital improvement as "...a physical betterment or item of equipment having a useful life, of at least five years, and a cost of ten thousand dollars (\$10,000) or more."

The Committee is responsible for evaluating each capital request on its individual merit, regardless of its source of funding. We do not rank individual requests against each other or against other noncapital funding requests. We do, however, ask any department head with multiple capital requests to list each proposed project in order of that department's own priorities.

Each capital requestor is asked to supply the following information for the Committee's consideration:

- A clear description of the project with available quantitative data;
- A statement that the project meets one of these rationales – replaces an aged item, addresses health and safety, meets a regulatory mandate, reduces future costs, or enhances services in a cost-effective manner;
- An indication that alternative solutions and funding sources have been investigated;
- Three quotes; or one quote from state bid list; or one quote from existing, approved supplier;
- Information showing an alignment with a recent engineering study, if applicable; and
- A five-year forecast of future capital requests.

## ARTICLE 8 Capital Improvement Plan

**1. Fire Department Officer in Charge Vehicle.** This request is to replace a current vehicle that was repurposed from the Police Department. The current vehicle has 100,000+ miles, mechanical issues and insufficient carrying capacity. The new Chevy Tahoe will house a special gear cabinet designed to help remove carcinogens from firefighting gear. Chief Ward expects to use the new Tahoe for 10 years, at 5K-8K miles per year. Total of \$55,432 for vehicle and fire service-related upgrades. **We recommend favorable action.**

**2a. Police Department Hybrid Pick-up.** This request is to replace a 2016 vehicle (100,000+ mileage) having mechanical issues with a hybrid F-150 pick-up truck. A pick-up will accommodate moving larger gear such as traffic barriers. Moving to hybrid is in alignment with the Town's sustainability goals. Total of \$62,750 for F-150 and police service-related upgrades. **We recommend favorable action.**

**2b. Police Department Electric Vehicle/Cruiser.** This request is to replace a 2017 first-line vehicle (100,000+ mileage) with a Mach-E electric vehicle. Chief Galvin expects EVs to have a longer useful life because, among other features, their idling time will not cause the wear and tear of conventional gas engines. Moving to an EV (electric vehicle) has both financial advantages through possible grants and is in alignment with the Town's sustainability goals. Total of \$59,300 for EV Cruiser and police service-related upgrades. **We recommend favorable action.**

**3a. Department of Public Works Stormwater (MS4 Permit Compliance).** This request is to fund Year 4 of a multi-year program to comply with EPA mandates for phosphorus reduction in the Charles River Watershed. AECOM, located in Manchester, New Hampshire, is the consultant for Sherborn's Storm Water

Management Program to comply with the MS4 Permit. Total of \$170,000 is the AECOM estimated cost of compliance support for FY24. **We recommend favorable action.**

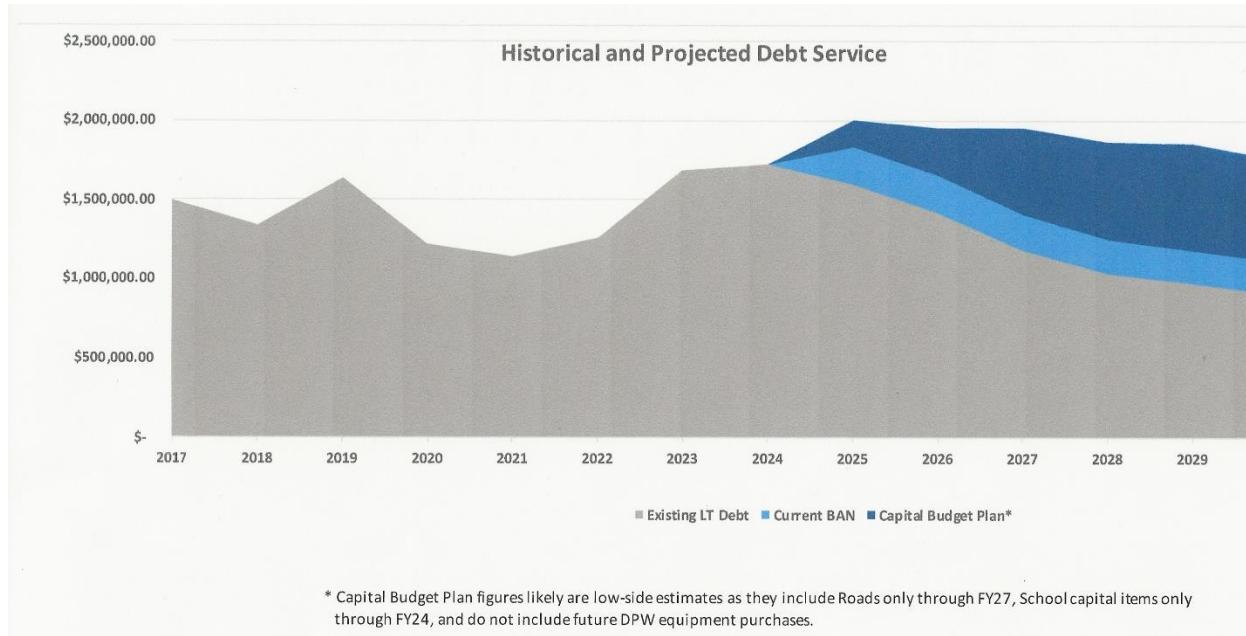
**3b. Department of Public Works Roadway Management.** This request marks the third year of a 5-year Roadway Management Plan (Green International Affiliates) to address deteriorating road conditions in the Town. This funding, plus Chapter 90 money, will allow renovation of several areas in significant disrepair. The amount is intended to cover price increases in material and labor due to inflationary conditions. Total \$250,000 for roadway renovations. **We recommend favorable action.**

**4. Select Board Town Facilities & Infrastructure.** This request is for the estimated costs of implementing the following projects either anticipated by the OnSite Insight Report (20-year plan, updated 2021) or for other pressing needs: \$65,000 Town Hall roof replacement and attic insulation; \$35,000 Town Hall HVAC upgrades; \$75,000 Transfer Station electrical service (code and safety compliance); \$130,000 Dry Hydrant System repairs; and \$45,000 general capital improvements for Town buildings and infrastructure. Total of \$350,000 to maintain value and utility of Town building and infrastructure assets. **We recommend favorable action.**

**6. Sherborn School Committee Pine Hill School EMS Upgrade.** This request is to complete the last leg of the Dover-Sherborn system-wide upgrade to an updated Energy Management System. Total \$40,000 will integrate Pine Hill heating and cooling control. **We recommend favorable action.**

## ARTICLE 9 Regional School Capital Expense

The Region's OnSite Insight report and recent repairs indicate that all seven air handler units at the High School have reached the end of their anticipated life and are due for replacement. New air handlers will be all electric. Bid of \$1,200,000 has been obtained. Sherborn's share is 46.05% for a capital project. Total cost to Sherborn of \$552,600 for replacement of roof-top air handlers on high school building. **We recommend favorable action.**



**Report of the Sherborn Advisory Committee  
2023 ANNUAL TOWN MEETING  
Sherborn, MA 01770**

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**RESIDENT  
SHERBORN, MA 01770**

Please bring this report with you to  
*The 2023 Annual Town Meeting*  
*Tuesday, April 25, 2023, 7PM*  
*Lindquist Commons*  
*Dover Sherborn Regional High School*