

Town of Carlisle Massachusetts, 01741

Finance Committee

To the Voters of Carlisle:

The Carlisle Finance Committee has completed its budget review and presents recommendations concerning the FY 2009 budget contained in the attached Warrant Book. Please refer to the glossary at the end of this Warrant Book for an explanation of the terms used in this letter.

Introduction

The Finance Committee, appointed by the Board of Selectmen, advises the Town Meeting on financial matters. The Committee, as required by law, presents a balanced budget to the annual Town Meeting. In this budget, Town expenditures are fully funded by revenues from property taxes within the levy limit, state aid, forecasted local receipts, and transfers from available funds such as free cash. Revenue from potential overrides may not be used to fund the balanced budget.

Balancing the Budget

The balanced budget presented in the FY 2009 Warrant meets the basic municipal and educational needs of the Town of Carlisle (the "Town"), including the Carlisle Public Schools (CPS) and the Concord-Carlisle Regional School District (CCRSD).

The Town continues to face significant financial challenges this year and the Finance Committee does not expect this to abate in the upcoming years, as revenue from new growth is far outpaced by rising costs. As an example, "new growth" in estimated housing value dropped from approximately \$20,700,000 in the twelve-month period ending on June 30, 2007 to an estimated \$8,000,000 for the current twelve-month period. Because the Town relies on housing for virtually 100% of its property tax revenue, the current slowdown in residential construction hits Carlisle particularly hard.

Meanwhile, the costs to educate our children, to heat its buildings and fuel its vehicles and to provide health benefits to Town and School employees are rising at double-digit rates. On a longer term basis, both CPS and CCRSD have indicated the need for significant school building projects. The cost of such projects will both increase the tax burden on each household and also require debt financing, which will be largely based on our Town's financial stability, as reflected in its bond rating. These are the primary reasons that last year's Special Committee for Long Term Financial Planning recommended that the Town place tighter controls on operating expenses. It is with this background that the Finance Committee submits its recommended 2009 balanced, or "Levy Limit" budget.

Revenue

The Finance Committee forecasts that FY 2009 revenue from all sources available will grow only 0.5% over FY 2008. Revenue raised through the property tax will grow 5.0%, including "new growth", all

within the provisions of Proposition 2½. State aid is forecast to be flat against the prior year and local receipts are forecast to increase only 1.1%.

Transfers from our free cash balance are also considered revenue. The recommended free cash transfer for FY 2009 is \$148,416, only 26% of the free cash transfer of FY 2008, which was \$561,588. Partly in anticipation of continued difficult times in FY 2010 and partly to support Carlisle’s bond rating (as discussed above), the Finance Committee, supported by the Board of Selectmen, does not recommend use of free cash that would drop its overall free cash balance below \$600,000, or approximately 3% of budget.

Generally, the Finance Committee recommends free cash for “one-time” expenses and not to support of ongoing operational items, because free cash does not permanently increase the levy limit, as an override would.

Free cash is proposed to fund an increase in the CPS budget by \$45,000 to supplement an \$80,000 transfer of funding from the Long Term Capital Requests Committee to the CPS operating budget. This total of \$125,000 will permit the School to maintain three teaching positions, previously slated to be eliminated, without the need for an override request. The free cash portion will support a one-year transition in the Language Arts program. However, the overall reduction in the School budget compared with “level service”, plus reductions due to enrollment declines, will mean the elimination of approximately eleven positions, which will require the Town to reserve an additional \$95,765 to cover potential unemployment claims. This amount is a one-time adjustment to the School operating budget that the Finance Committee recommends funding via a transfer from free cash.

In addition, a small amount of free cash is recommended to supplement the energy spikes anticipated by the Police and the Department of Public Works. Finally, as the presidential election will fall in FY 2009, approximately \$1000 is recommended from free cash to support the unique requirements of a federal election.

These free cash transfers amount to a total of \$148,416.

Levy Limit Spending

Total operational spending within the levy limit, including town debt service but excluding capital expenditures is essentially flat as compared with FY 2008 (See Table 1). The debt service for FY 2009 will decline by 2.4%, while departmental spending will increase by 2.5%.

Operating Budget

The Town operating budget breaks down as follows:

Education	63.6%
Other Town Departments	21.7%
Insurance & Benefits	8.3%
Debt and Service	4.9%
Other	1.5%

The balanced budget for education will grow 1.6 %, which reflects a reduction in the assessment for Minute Man Regional High School (MMRHS) and a small increase in Carlisle’s assessment for CCRSD. The Town portion of the balanced budget will grow .64%. Insurance and retirement benefits the Town provides to employees, including CPS, will grow 18.6% and 10.6%, respectively.

Capital Exclusions

The proposed Warrant Articles do not include any capital exclusions for FY 2009.

Debt

In FY 2009, net excluded debt will increase by 2.4%, primarily due to an increase in the debt incurred by CCRSD on items approved in prior years. Actual net debt service levels will increase by 4.9% compared to FY 2008. (See Table II.)

The Budget Override

As part of the budgeting process, the Finance Committee reviewed all departmental requests above the levy limit budget. Town departments and CPS did a commendable job in reducing discretionary spending to offset increases in wages, energy and insurance costs. Therefore, no override is requested to cover these increases for FY 2009.

CCRSD faces a unique set of challenges in its 2009 operating budget, driven largely by a 22% increase in costs associated with providing special education (SPED). The regular education budget was actually reduced by 2%, but the overall increase requested is 5%. The increase in Carlisle's portion, net of the "assessment ratio" which was included in the Levy Limit Budget, is \$251,610. The Finance Committee, supported by the Board of Selectmen, recommends this increase as an override to the Levy Limit Budget. We recommend this approach over other funding means (cutting other departments, using free cash, etc.) for the following reasons:

1. Other Town departments and the CPS, as noted above, cannot reasonably absorb a \$251,000 reduction in their collective budgets.
2. Use of free cash is a "one-time fix" that will not address a longer term operational cost issue associated with secondary education.

While the assessment ratio will swing slightly in our favor in 2010, it goes against Carlisle more dramatically in 2011. In 2011 the CCRSD budget will become an increasingly large portion of the Carlisle budget due to an increase in the number of students attending the High School from Carlisle.

An override, while not a permanent solution, will build some additional levy limit capacity into the Town budget for future years. The override, if passed, would represent a 3.7% increase to the average tax bill.

Finance Committee Conclusions

The Finance Committee has ongoing concerns about the overall growth of spending relative to revenue, now and in the future. In particular:

- New growth (of residential housing) has remained below historic levels, and is expected to continue to do so for FY 2010;
- It is likely that the Town will face significant capital projects in the near future; and
- The cost pressure from wages, energy and insurance seems likely to continue.

Specifically, without increased state aid, a moderation in utility and benefit cost increases and an improved real estate environment we see significant challenges in maintaining educational and town services as well as funding new capital projects. There is a need, in the Committee's opinion, for a

fundamental review of how Carlisle can continue to deliver “stand-alone” town services as well as an outstanding education program.

Because new growth is unlikely to keep pace with costs, it is the recommendation of the Finance Committee that the Board of Selectmen look seriously at new sources of revenue and alternative ways to deliver Town services. We welcome citizen input into the process beyond the annual Town Meeting and its associated hearings. Committee meetings are posted in the Mosquito and we urge you to attend or e-mail your thoughts to us at

fincom@carlisle.mec.edu.

Meanwhile, please review the material in this booklet and attend the Finance Committee hearing on the Warrant at 7.30 pm in the Town Hall on Monday, April 28th.

Sincerely,

The Carlisle Finance Committee

David Model, Chair
Thornton Ash
Barbara Bjornson
David Guarino
Jerry Lerman
Edward Sullivan
David Verrill

**Table 1 - Town of Carlisle Finance Committee
FY'09 Summary Budget Presentation**

SUMMARY	FY'08 Budget	Articles 8, 9, 10, 12, 13, 14, 16, & 21 FY'09 Levy Limit Operating Budget Note A		Article 15 FY'09 Override Budget Note B	
		Budget	% Change from FY'06	Budget	% Change from FY'06
Revenue:					
Property Taxes - within levy limit	\$17,259,544	18,119,089	5.0%	18,119,089	5.0%
Overrides Voted / Required	245,682	-	-100.0%	251,610	2.4%
Property Taxes - excluded debt	1,159,507	1,187,340	2.4%	1,187,340	2.4%
Property Taxes - capital exclusion	152,000	-		0	
State aid	1,496,305	1,496,305	0.0%	1,496,305	0.0%
Local Receipts	1,210,874	1,224,707	1.1%	1,224,707	1.1%
Fund Transfers	756,426	368,283	-51.3%	368,283	-51.3%
Total Revenue	22,280,338	22,395,724	0.5%	22,647,334	1.6%
Expenditures:					
State, County & Other	177,756	173,720	-2.3%	173,720	-2.3%
Warrant Articles	229,687	149,500	-34.9%	149,500	-34.9%
Operating Budgets					
General Government	1,097,731	1,070,151	-2.5%	1,070,151	-2.5%
Protection of Persons & Property	1,807,387	1,836,773	1.6%	1,836,773	1.6%
Board of Health	77,491	77,491	0.0%	77,491	0.0%
Public Works	1,000,573	1,006,290	0.6%	1,006,290	0.6%
Public Assistance	110,731	110,731	0.0%	110,731	0.0%
Education	13,917,279	14,135,454	1.6%	14,387,064	3.4%
Library	487,110	487,110	0.0%	487,110	0.0%
Recreation	106,954	116,462	8.9%	116,462	8.9%
Insurance & Benefits	1,103,862	1,308,765	18.6%	1,308,765	18.6%
Unclassified	100,186	113,990	13.8%	113,990	13.8%
County Retirement	472,764	522,882	10.6%	522,882	10.6%
Debt Service	1,299,327	1,277,405	-1.7%	1,277,405	-1.7%
Total Operating Budgets	21,581,395	22,063,504	2.2%	22,315,114	3.4%
Capital Exclusion	152,000	-		-	
Separate Articles	139,500	9,000		9,000	
Total Budgeted Expenditures	22,280,338	22,395,724	0.5%	22,647,334	1.6%
Surplus/(Deficit)	\$ -	\$ -		\$ -	

**WARRANT
ANNUAL TOWN MEETING – May 5, 2008**

THE COMMONWEALTH OF MASSACHUSETTS

Middlesex, ss.

To either of the Constables of the Town of Carlisle in the County of Middlesex:

GREETINGS

IN THE NAME OF the Commonwealth of Massachusetts, you are hereby directed to notify and warn the inhabitants of said Town, qualified to vote in elections and town affairs, to meet at the Corey Building at 150 Church Street in said Carlisle on Monday, the Fifth of May next, at seven o'clock in the evening, and thereafter continuing from day to day until completed, then and there to act on the following articles:

ARTICLE 1 - Town Reports: To hear and act upon the reports of Town Officers, Boards, Committees, Commissioners, and Trustees, or take any other action related thereto. (BOARD OF SELECTMEN)

ARTICLE 2 – Fiscal Year 2008 Budget Transfers : To see what sums the Town will vote to transfer into various line items of the Fiscal Year 2008 operating budget from other line items of said budget or from other available funds, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 3 – Fiscal Year 2008 Stabilization Account Transfer for Court Judgment: To see if the Town will vote to transfer from the Stabilization Account a sum of money to refund during Fiscal Year 2008 to a taxpayer certain G. L. ch. 61 roll back taxes paid by said taxpayer with interest in accordance with a court judgment, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 4 – Fiscal Year 2008 Budget Transfer for Court Judgment: To see what sums the Town will vote to transfer to refund during Fiscal Year 2008 to a taxpayer certain G. L. ch. 61 roll back taxes paid by said taxpayer with interest in accordance with a court judgment, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 5 – Fiscal Year 2008 Free Cash Transfer for Court Judgment: To see what sum the Town will vote to transfer from Free Cash (Surplus Revenue) to refund during Fiscal Year

2008 to a taxpayer certain G. L. ch. 61 roll back taxes paid by said taxpayer with interest in accordance with a court judgment, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 6 – Fiscal Year 2008 Free Cash Transfer CCRSD: To see what sum the Town will vote to transfer from Free Cash (Surplus Revenue) in the treasury of the Town to increase the Fiscal Year 2008 Concord Carlisle Regional School District budget as appropriated pursuant to Article 4 of the April 30, 2007 Town Meeting, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 7 – Fiscal Year 2008 Free Cash Transfer CPS Building Project: To see what sum the Town will vote to transfer from Free Cash (Surplus Revenue) in the treasury of the Town to be spent by the Board of Selectmen for the purpose of professional services (Owner’s Project Manager) and/or related expenses in connection with the design of a new school building for the Town of Carlisle, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 7, for a free cash transfer in the amount of \$25,000.

ARTICLE 8 - Salaries of Elected Officials: To see if the Town will vote to fix the salaries of the elected officers of the town as provided by Chapter 41, Section 108 of the General Laws, as amended, for the Fiscal Year 2009, beginning July 1, 2008, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

	<u>Voted FY’07</u>	<u>Voted FY’08</u>	<u>Recommended FY’09</u>
Moderator	\$50	\$50	\$50
Town Clerk	\$48,128	\$49,812	\$51,306
Assessors - Chairman	\$100	\$100	\$100
Second Member	\$100	\$100	\$100
Third Member	\$100	\$100	\$100

Finance Committee Recommendation: The Finance Committee recommends approval of Article 8.

ARTICLE 9 - Operating Budget: To see what sums of money the Town will raise and appropriate, transfer from available funds, or borrow pursuant to any applicable statute, to fund

the various departments, boards, commissions, and operating expenses of the town for the Fiscal Year 2009, beginning July 1, 2008, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Article 9

	<u>FY'08</u>	<u>ARTICLES 9&16</u> <u>FY'09</u> <u>Levy Limit</u> <u>Budget</u>	<u>ARTICLES 13 & 14</u> <u>FY'09</u> <u>Stabilization/</u> <u>Transfer Increases</u>	<u>ARTICLE 15</u> <u>FY'09</u> <u>Override</u> <u>Budget</u>
General Government	1,097,731	1,070,151	1,070,151	1,070,151
Protection of Persons & Property	1,807,387	1,836,773	1,836,773	1,836,773
Board of Health	77,491	77,491	77,491	77,491
Public Works	1,000,573	1,006,290	1,006,290	1,006,290
Public Assistance	110,731	110,731	110,731	110,731
Education	13,917,279	14,135,454	14,135,454	14,387,064
Library	487,110	487,110	487,110	487,110
Recreation	106,954	116,462	116,462	116,462
Insurance & Benefits	1,103,862	1,308,765	1,308,765	1,308,765
Unclassified	100,186	113,990	113,990	113,990
Retirement & Tax Title	472,764	522,882	522,882	522,882
Long Term Debt	1,119,437	1,057,538	1,092,635	1,092,635
Total	<u>21,401,505</u>	<u>21,843,637</u>	<u>21,878,734</u>	<u>22,130,344</u>

Finance Committee Recommendation: The Finance Committee recommends approval of Article 9, in the total amount of \$21,843,637 as further detailed below subject to approval of \$148,416 in free cash transfer under Article 16.

General Government

	<u>FY'08</u> <u>Budget</u>	<u>ARTICLES 9&16</u> <u>FY'09</u> <u>Levy Limit</u> <u>Budget</u>	<u>ARTICLES 13 & 14</u> <u>FY'09</u> <u>Stabilization/</u> <u>Transfer Increases</u>	<u>ARTICLE 15</u> <u>FY'09</u> <u>Override</u> <u>Budget</u>
General Government				
General Expense	482,853	497,853	497,853	497,853
Citizen Recognition	170	170	170	170
Treasurer/Collector	168,732	135,090	135,090	135,090
Town Clerk	62,575	62,575	62,575	62,575
Registrars & Elections	6,821	7,883	7,883	7,883
Assessors	97,522	97,522	97,522	97,522
Town Hall	185,499	190,499	190,499	190,499
Planning Board	93,559	78,559	78,559	78,559
sub-total	<u>1,097,731</u>	<u>1,070,151</u>	<u>1,070,151</u>	<u>1,070,151</u>

General Expenses: The Finance Committee recommends a balanced budget appropriation of \$497,853 for this budget item.

Citizen Recognition: The Finance Committee recommends a balanced budget appropriation of \$170 for this budget item.

Treasurer/Tax Collector: The Finance Committee recommends a balanced budget appropriation of \$135,090 for this budget item.

Town Clerk: The Finance Committee recommends a balanced budget appropriation of \$62,575 for this budget item.

Registrars and Elections: The Finance Committee recommends a balanced budget appropriation of \$7,883 for this budget item.

Assessors: The Finance Committee recommends a balanced budget appropriation of \$97,522 for this budget item.

Town Hall: The Finance Committee recommends a balanced budget appropriation of \$190,499 for this budget item.

Planning Board: The Finance Committee recommends a balanced budget appropriation of \$78,559 for this budget item.

Protection of Persons and Property

	<u>FY'08</u> <u>Budget</u>	<u>ARTICLES 9&16</u> <u>FY'09</u> <u>Levy Limit</u> <u>Budget</u>	<u>ARTICLES 13 & 14</u> <u>FY'09</u> <u>Stabilization/</u> <u>Transfer Increases</u>	<u>ARTICLE 15</u> <u>FY'09</u> <u>Override</u> <u>Budget</u>
Protection of Persons & Property				
Police	1,154,663	1,189,816	1,189,816	1,189,816
Fire	259,132	259,132	259,132	259,132
Communications	251,560	267,276	267,276	267,276
Conservation	60,125	53,859	53,859	53,859
Dog & Animal Control	9,730	9,730	9,730	9,730
Inspectional Services	51,177	33,860	33,860	33,860
Street-Lighting	21,000	23,100	23,100	23,100
sub-total	<u>1,807,387</u>	<u>1,836,773</u>	<u>1,836,773</u>	<u>1,836,773</u>

Police: The Finance Committee recommends a balanced budget appropriation of \$1,189,816 for this budget item.

Fire: The Finance Committee recommends a balanced budget appropriation of \$259,132 for this budget item.

Communications: The Finance Committee recommends a balanced budget appropriation of \$267,276 for this budget item.

Conservation: The Finance Committee recommends a balanced budget appropriation of \$53,859 for this budget item.

Dog & Animal Control: The Finance Committee recommends a balanced budget appropriation of \$9,730 for this budget item.

Inspectional Services: The Finance Committee recommends a balanced budget appropriation of \$33,860 for this budget item.

Street Lighting: The Finance Committee recommends a balanced budget appropriation of \$23,100 for this budget item.

Board of Health

	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
Board of Health	77,491	77,491	77,491

Board of Health: The Finance Committee recommends a balanced budget appropriation of \$77,491 for this budget item.

Public Works

	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
Public Works			
DPW (incld trees)	583,369	591,826	591,826
Snow & Ice	65,132	65,132	65,132
Transfer Station	265,389	262,649	262,649
Road Maintenance	86,683	86,683	86,683
sub-total	1,000,573	1,006,290	1,006,290

DPW: The Finance Committee recommends a balanced budget appropriation of \$591,826 for this budget item.

Snow & Ice: The Finance Committee recommends a balanced budget appropriation of \$65,132 for this budget item.

Transfer Station: The Finance Committee recommends a balanced budget appropriation of \$262,649 for this budget item.

Road Maintenance: The Finance Committee recommends a balanced budget appropriation of \$86,683 for this budget item.

Public Assistance

	<u>FY'08</u>	<u>ARTICLES 9&16</u> <u>FY'09</u> <u>Levy Limit</u> <u>Budget</u>	<u>ARTICLES 13 & 14</u> <u>FY'09</u> <u>Stabilization/</u> <u>Transfer Increases</u>	<u>ARTICLE 15</u> <u>FY'09</u> <u>Override</u> <u>Budget</u>
Public Assistance				
Youth Commission	2,594	2,594	2,594	2,594
Council on Aging	95,342	95,342	95,342	95,342
Senior Tax Voucher Program	11,250	11,250	11,250	11,250
Veteram's Agent	1,545	1,545	1,545	1,545
sub-total	110,731	110,731	110,731	110,731

Youth Commission: The Finance Committee recommends a balanced budget appropriation of \$2,594 for this budget item.

Council on Aging: The Finance Committee recommends a balanced budget appropriation of \$95,342 for this budget item.

Senior Tax Voucher Program: The Finance Committee recommends a balanced budget appropriation of \$11,250 for this budget item.

Veteran's Agent: The Finance Committee recommends a balanced budget appropriation of \$1,545 for this budget item.

Education

	<u>FY'08</u>	<u>ARTICLES 9&16</u> <u>FY'09</u> <u>Levy Limit</u> <u>Budget</u>	<u>ARTICLES 13 & 14</u> <u>FY'09</u> <u>Stabilization/</u> <u>Transfer Increases</u>	<u>ARTICLE 15</u> <u>FY'09</u> <u>Override</u> <u>Budget</u>
Education				
Carlisle Public Schools	8,816,684	8,941,684	8,941,684	8,941,684
CCRS	4,743,459	4,772,248	4,772,248	5,023,858
CCRS debt service	185,420	268,437	268,437	268,437
MMRHS	171,716	153,085	153,085	153,085
sub-total	13,917,279	14,135,454	14,135,454	14,387,064

Carlisle Public Schools: The Finance Committee recommends a balanced budget appropriation of \$8,941,684 for this budget item.

Concord Carlisle Regional High School: The Finance Committee recommends a balanced budget appropriation of \$4,772,248 for this budget item.

Concord Carlisle Regional High School Debt Service: The Finance Committee recommends a balanced budget appropriation of \$268,437 for this budget item.

Minuteman Regional High School: The Finance Committee recommends a balanced budget appropriation of \$153,085 for this budget item.

Library				
	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>	
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>	
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>	
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>	
Library	487,110	487,110	487,110	487,110

Library: The Finance Committee recommends a balanced budget appropriation of \$487,110 for this budget item.

Recreation				
	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>	
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>	
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>	
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>	
Recreation	106,954	116,462	116,462	116,462

Recreation: The Finance Committee recommends a balanced budget appropriation of \$116,462 for this budget item.

Insurance & Benefits (formerly Pensions & Benefits)

	<u>FY'08</u>	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>Budget</u>	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
		<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
		<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
Insurance & Benefits				
Blanket Insurance	140,000	145,000	145,000	145,000
Group Insurance	930,862	1,014,765	1,014,765	1,014,765
Unemployment Insurance	33,000	149,000	149,000	149,000
sub-total	1,103,862	1,308,765	1,308,765	1,308,765

Blanket Insurance: The Finance Committee recommends a balanced budget appropriation of \$145,000 for this budget item.

Group Insurance: The Finance Committee recommends a balanced budget appropriation of \$1,014,765 for this budget item.

Unemployment Insurance: The Finance Committee recommends a balanced budget appropriation of \$149,000.

Unclassified

	<u>FY'08</u>	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>Budget</u>	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
		<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
		<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
Unclassified				
Interest, fees, & costs	5,000	1,000	1,000	1,000
Public Celebrations	632	632	632	632
Reserve Fund Balance	94,554	112,358	112,358	112,358
sub-total	100,186	113,990	113,990	113,990

Interest, Fees, & Costs: The Finance Committee recommends a balanced budget appropriation of \$1,000 for this budget item.

Public Celebrations: The Finance Committee recommends a balanced budget appropriation of \$632 for this budget item.

Reserve Fund: The Finance Committee recommends a balanced budget appropriation of \$112,358 for this budget item.

County Retirement

	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
County Retirement	472,764	522,882	522,882

County Retirement: The Finance Committee recommends a balanced budget appropriation of \$522,882 for this budget item.

Long Term Debt Service

	<u>ARTICLES 9&16</u>	<u>ARTICLES 13 & 14</u>	<u>ARTICLE 15</u>
	<u>FY'09</u>	<u>FY'09</u>	<u>FY'09</u>
<u>FY'08</u>	<u>Levy Limit</u>	<u>Stabilization/</u>	<u>Override</u>
<u>Budget</u>	<u>Budget</u>	<u>Transfer Increases</u>	<u>Budget</u>
Long Term Debt	1,119,437	1,057,538	1,092,635

Long Term Debt: The Finance Committee recommends a balanced budget appropriation of \$1,057,538 for this budget item.

ARTICLE 10 – Capital Equipment: To see what sums of money the Town will raise and appropriate, transfer from available funds, or borrow pursuant to any applicable statute for various capital purposes, or provide by any combination of these methods, or take any other action related thereto. (BOARD OF SELECTMEN/LONG TERM CAPITAL REQUIREMENTS COMMITTEE)

**Long Term Capital Requirements
FY'09**

Fire Department	Protective Clothing	6,500
Fire Department	Pagers	5,000
Fire Department	Engine 5 repairs	15,000
Carlisle Public Schools	Roof	10,000
Carlisle Public Schools	Classroom Furniture	7,500
Carlisle Public Schools	Gym Bleacher Refurb.	8,000
Carlisle Public Schools	Corey Water Filter	12,500
Carlisle Public Schools	Misc. Maintenance	25,000
Town Administrator	ADA Compliance	5,000
Police Department	Police Cruiser	36,000
Police Department	Digital Radio	4,000
Police Department	Radar Units	10,000
Police Department	Holsters	5,000
TOTAL		149,500

Combined Finance Committee and Long Term Capital Requirements Committee

Recommendations: Both Committees recommend approval of the preceding amounts for the items described under Article 10, FY'09 Balanced Budget for \$149,500.

ARTICLE 11 – Revaluation: To see what sums of money the Town will raise and appropriate, transfer from available funds, or borrow pursuant to any applicable statute to be spent by the Board of Assessors for the purpose of professional services in connection with revaluation of real estate and personal property in the Town, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 11 for \$5,000 to be spent by the Board of Assessors for professional services connected with the revaluation. The intent of this article is to plan for and budget a portion of the cost for the revaluation, that must be done every three years by the Assessors, in each of the years leading up to the revaluation.

ARTICLE 12 – Actuarial: To see what sums of money the Town will raise and appropriate, transfer from available funds, or borrow pursuant to any applicable statute to be spend by the Board of Selectmen for the purpose of professional services in connection with GASB 45 actuarial valuation of post employment benefits for the Town, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 12 for \$4,000 to be spent by the Board of Selectmen for professional services connected with the Actuarial. The intent of this article is to plan for and budget a portion of the cost for the

actuarial, that must be done every two years by the Treasurer, in each of the years leading up to the revaluation.

ARTICLE 13 – Fiscal Year 2009 Reserve for Debt Services – MSBA Transfer: To see what sums the Town will vote to transfer from Reserve for Debt Services – MSBA to be applied to the payment of principal on Debt Service or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 13 to transfer from the Reserve for Debt Services – MSBA account a sum of \$20,149.00 to be used to repay the principal and interest on a portion of the debt service for the Carlisle Public School, increasing the FY09 long-term debt service appropriation to \$1,077,687.

ARTICLE 14 – Fiscal Year 2009 Stabilization Account Transfer: To see if the Town will vote to transfer from the Stabilization Account a sum of money to be applied to the payment of principal and interest on Debt Service or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 14 to transfer from the Stabilization Fund a sum of \$14,948 to be used to repay the principal and interest on a portion of the debt service, increasing the FY09 long-term debt service appropriation to \$1,092,635.

ARTICLE 15 – Increased Budget Funding: 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 beyond the amount appropriated in Article 7, to fund various departments, boards, commissions, capital, and operating expenses of the town for the Fiscal Year 2009, beginning July 1, 2008, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 15 to increase the Education line in Article 9 by \$251,610 for a new total of \$14,387,064. (This reflects an increase of \$251,610 in the CCRSD line for a new total of \$5,023,858. This increased funding is contingent upon the passage of Ballot Question 1.

ARTICLE 16 – Fiscal Year 2009 Transfer Free Cash: To see what sum the Town will vote to transfer from Free Cash (Surplus Revenue) in the treasury of the Town to meet the appropriations for Fiscal Year 2009, beginning July 1, 2008 or to authorize the Assessors to use to establish the tax rate, or take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee will make its recommendation at Town Meeting.

ARTICLE 17 - Department Revolving Funds Authorization: To see what revolving funds the Town may authorize or reauthorize pursuant to Massachusetts General Laws Chapter 44, Section 53E ½ for the Fiscal Year 2009, beginning July 1, 2008, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 17 that authorizes the existence of the following revolving special revenue funds: School buses, Board of Health, Hazardous Wastes, Trails Committee, Conservation Wetlands, Conservation Foss Farm, Conservation Building Maintenance, Historical Commission, Youth Commission, Building Department, and Council on Aging. All of these Funds receive their revenues from user fees and grant awards, which are spent to provide services as determined in each of the fund’s charter.

Department Revolving Funds

Revenue Funds	Revenue Source	Authority to Spend	Use of Fund	Spending Limit
School Buses	User Fees Collected by School	School Committee	To provide transportation for 7 th and 8 th grade students	\$60,000
Board of Health Inspections	Board of Health Fees	Board of Health	Specific expert engineering and consulting services to review septic and well installations and repairs, sanitary inspections and other appropriate reimbursable expenses.	\$50,000
Hazardous Wastes	Transfer Station User Fees & Grants Received	Board of Selectmen	Collection and disposal of household hazardous waste.	\$30,000
Trails Committee	Sale of Trails in Carlisle Book	Board of Selectmen	Building, maintaining and enhancing recreation trails.	\$5,000
Conservation Wetlands	Fees from Carlisle Wetland Protection Bylaw	Conservation Commission	Specific expert engineering and consulting services to review Wetland Bylaw filings and other appropriate reimbursable expenses.	\$30,000
Conservation Foss Farm	User Fees	Conservation Commission	Activities and maintenance associated with Foss Farm.	\$2,500
Conservation Building Maintenance	Fees and/or Rent	Conservation Commission	Maintenance and repairs associated with the Buildings located on Conservation Commission Lands	\$30,000
Historical Commission	Fees	Historical Commission	Reasonable expenses related to filings/applications.	\$3,000
Youth Commission	Event Admission Fees	Board of Selectmen	To provide for dances and other events sponsored by the Youth Commission.	\$5,000
Building Inspector	User Fees	Board of Selectmen	To cover inspectional services	\$75,000
Council on Aging	User Fees	Council on Aging	To provide for events sponsored sponsored by the Council on Aging	\$10,000

ARTICLE 18 – FY 2009 Chapter 90 Authorization: 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 to be used for reconstruction and improvements of Public Ways as provided for under the provisions of Chapter 90 of the Massachusetts General Laws, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 18 to fund road reconstruction and improvement of public ways. Under the General Laws, the Commonwealth of Massachusetts will reimburse the Town for these monies.

ARTICLE 19 – Real Estate Tax Exemption: To see if the Town will vote to accept G.L. Chapter 59, Section 5 (clause 41C) to grant an additional real estate tax exemption of up to one hundred (100%) percent, or take any other action related thereto. (BOARD OF SELECTMEN/BOARD OF ASSESSORS)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 19.

ARTICLE 20 – Lease of Land for Wireless Facilities: To see if the Town will vote to authorize the Board of Selectmen to lease, for a term not to exceed twenty (20) years, or otherwise dispose of all or portions of those certain Town-owned properties set forth below, for the purposes of construction and operation of a wireless CAM (concealed antenna monopole) system or DAS (distributed antenna system) and related facilities, subject to Massachusetts G.L. ch.30B, or take any other action related thereto:

- the Fire Department property, known as Assessors Map 21, Parcel 1, lot 0 and located at 80 Westford Street;
- the Town Hall property, known as Assessors Map 22, Parcel 82, lot 0 and located at 66 Westford Street;
- the DPW property, known as Assessors Map 21, Parcel 10, lot 0 and Parcel 11, lot 0, off Lowell St.;
- the Conant Property, known as Assessors Map 20, Parcel 6, lot 0, off Rockland Street.

(BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 20.

ARTICLE 21 – CPA Authorization: To see if the town will vote to act on the report of the Community Preservation Committee and to appropriate or reserve for later appropriation monies from the Community Preservation Fund annual revenues or available funds and to authorize the Board of Selectmen to convey, or accept as the case may be, appropriate historic preservation restrictions for historic resources, open space restriction to be in compliance with the requirements of Chapter 44B, section 12 of the General Laws of the Commonwealth, and to take any other action related thereto. (BOARD OF SELECTMEN/COMMUNITY PRESERVATION COMMITTEE)

Community Preservation Committee: The Community Preservation Committee recommends the following:

1. Liberty Statue Restoration – That \$4,000 be appropriated from the Community Preservation Historical Fund balance for the Carlisle Historical Commission, through the Board of Selectmen, to expand for the conservation, assessment and cleaning for the Soldiers Monument in the center of the Carlisle rotary.
2. Protection/Display of Historical Artifacts – That \$2,500 be appropriated from the Community Preservation Historical Fund for the Historical Commission, through the Board of Selectmen, to expend for the conservation and exhibiting of artifacts related to the history of Carlisle
3. Gleason Library Facade Restoration – That \$40,000 be appropriated from the Community Preservation Historical Fund for the Trustees of the Gleason Public Library to expend for the procurement of a preservation specialist, the development of a plan of preservation reconstruction, and the oversight of successful implementation of the plan to preserve the library facade.
4. Town Honor Roll – That \$98,070 be appropriated from the Community Preservation Undesignated Fund for the Board of Selectmen to expend for the restoration and refurbishment of the war memorials located on the Town Common and some additional grading work on the common near the flag pole.
5. Benfield Infrastructure – It is anticipated that this may be advanced by the Community Preservation Committee for consideration by Town Meeting. This project would provide for funds to be distributed by the Carlisle Housing Trust for the purpose of developing infrastructure on the land known as Benfield Parcel A relating to the potential development of affordable housing. Funds in the amount of \$425,000 are being discussed and would be utilized for the development of a roadway into the property, a well and septic facilities. At the deadline for production of the warrant book the CPC had not completed its evaluation and potential approval of this request.

Finance Committee Recommendation: The Finance Committee will make its recommendation on Article 21 at Town Meeting.

ARTICLE 22 – Town Ways/Acceptance of Great Brook Path: To see if the Town will vote to lay out Great Brook Path as shown on the plan entitled “Great Brook Path in Carlisle, Mass.”, dated July, 2007 and filed with the Town Clerk, or any portion thereof, as a Town way; and further to authorize the Board of Selectmen to acquire by purchase, gift or eminent domain the fee or lesser title interests in said way, and further to see if the Town will vote to raise and appropriate, borrow pursuant to any applicable statute or transfer from available funds, a sum of money for such purpose; and to take such other actions related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article

ARTICLE 23 – Town Ways/Acceptance of Koning Farm Road: To see if the Town will vote to lay out Koning Farm Road as shown on the plan entitled “Koning Farm Road Carlisle, Massachusetts”, dated February 9, 2007, revised July 12, 2007 and Sept. 10, 2007, and filed with the Town Clerk, or any portion thereof, as a Town way; and further to authorize the Board of Selectmen to acquire by purchase, gift or eminent domain the fee or lesser title interests in said way, and further to see if the Town will vote to raise and appropriate, borrow pursuant to any applicable statute or transfer from available funds, a sum of money for such purpose; or to take such other actions related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

ARTICLE 24 – Town of Carlisle Inter-Municipal Bruce Freeman Rail Trail Contract Agreement: To see if the Town will vote to authorize the Board of Selectmen to enter into one or more Inter Municipal Agreements with any or all of the Towns of Acton and Westford, or any subdivision or agency thereof, pursuant to G.L. Chapter 40, s.4A, for the purpose of effectuating the acquisition, design and construction of the Bruce Freeman Rail Trail, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

ARTICLE 25 – Community Septic Management Program: To see if the Town will vote to raise and appropriate, transfer from available funds or borrow pursuant to any applicable statute from the Massachusetts Water Pollution Abatement Trust, or otherwise from any source, a sum or sums of money for the purposes of the Board of Health to expend directly or indirectly, pursuant to G.L. Chapter 111, s. 127B1/2 or any other applicable statute, as loans to homeowners for the design, construction, repair, replacement and/or upgrade of septic systems and any other work related to water-pollution abatement projects authorized pursuant to written agreements between the Board of Health and residential property owners, including without limitation all costs thereof as defined in Section 1 of Chapter 29C of Massachusetts General Laws; or to take any action related thereto. (BOARD OF SELECTMEN/BOARD OF HEALTH)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

ARTICLE 26 – Acceptance of Easements Lowell Street, East Street, Concord Street and Bedford Road Pathways: To see if the Town will vote to authorize the Board of Selectmen to acquire by gift, purchase or eminent domain easements of real property described below to be used for all purposes for which pathways are used in the Town of Carlisle:

the Lowell Street Pathway as shown on the plan entitled “Proposed Footpath Plan of Land Lowell Street” dated October 4, 2005, revised August 28, 2007 and October 9, 2007, which plan is on file at the Office of the Town Clerk;

the East Street Pathway as shown on the plan entitled “East Street Plan of Proposed Bike and Pedestrian Path Carlisle, Massachusetts” dated April 2005, which plan is on file at the Office of the Town Clerk;

the Concord Street Pathway as shown on plan entitled “Proposed Footpath Plan of Land Concord Street Carlisle, Massachusetts, dated October 4, 2005, revised August 28, 2007 and October 9, 2007, which plan is on file at the Office of the Town Clerk;

the Bedford Road Pathway as shown on the plan entitled "As-Built Sidewalk Plan, Bedford Road, Carlisle, MA", dated May 25, 2005, which plan is on file at the Office of the Town Clerk,

or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

ARTICLE 27 – CPS Bus Contract: To see if the Town will vote to authorize the Carlisle School Committee or the designee to enter into a five year contract for bus services, or take any other action related thereto. (BOARD OF SELECTMEN/SCHOOL COMMITTEE)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

ARTICLE 28 – Revision to General Provision, General Bylaws Article 1: To see if the Town will vote to amend Section 1.4.2 of the Town of Carlisle General Bylaws, Non-criminal Disposition, to include the following:

Board of Health –

Enforce the Town of Carlisle Supplementary Sewage Disposal Regulations and Water Supply Regulations in accordance with M.G.L. c.111, sec. 31

\$300.00 per violation

or take any other action related thereto. (BOARD OF SELECTMEN/BOARD OF HEALTH)

Finance Committee Recommendation: Because it has no significant impact on town finances the Finance Committee has no recommendation on this article.

And in the name of the Commonwealth of Massachusetts you are hereby further required to notify and warn the inhabitants of the Town of Carlisle, qualified as aforesaid, to go to the Town Hall Building at 66 Westford Street in said Carlisle on Tuesday, the 13th day of May, 2008 between the hours of seven o'clock forenoon and eight o'clock in the afternoon and there to vote on the following:

BALLOT QUESTIONS

TOWN ELECTION – MAY 13, 2008

7:00 A.M. TO 8:00 P.M.

ELECTION OF OFFICERS – To see if the Town will vote on the election of the following Town Officers:

Moderator	one for a term of one year
Selectmen	two for a term of three years
Board of Assessors	one for a term of three years
Board of Health	one for a term of three years
Housing Authority	one for a term of five years
Library Trustees	one for a term of three years
Planning Board	two for a term of three years
School Committee	two for a term of three years

OVERRIDE QUESTIONS

G.L. c.59, s.21C(g)

Question 1: Shall the Town of Carlisle be allowed to assess an additional \$251,610 (Two Hundred Fifty One Thousand Six Hundred Ten Dollars) in real estate and personal property taxes for the purpose of operating the Concord Carlisle Regional School District for the Fiscal Year 2009, beginning July 1, 2008.

YES_____ NO_____

And you are directed to serve this warrant by posting a true and attested copy thereof at the Town Hall and at the Post Office in said Town of Carlisle at least seven days prior to the time of holding said meeting.

THEREOF FAIL NOT and make return of this warrant, with your doings thereon, to the Town Clerk, at the time and place of holding the meeting aforesaid.

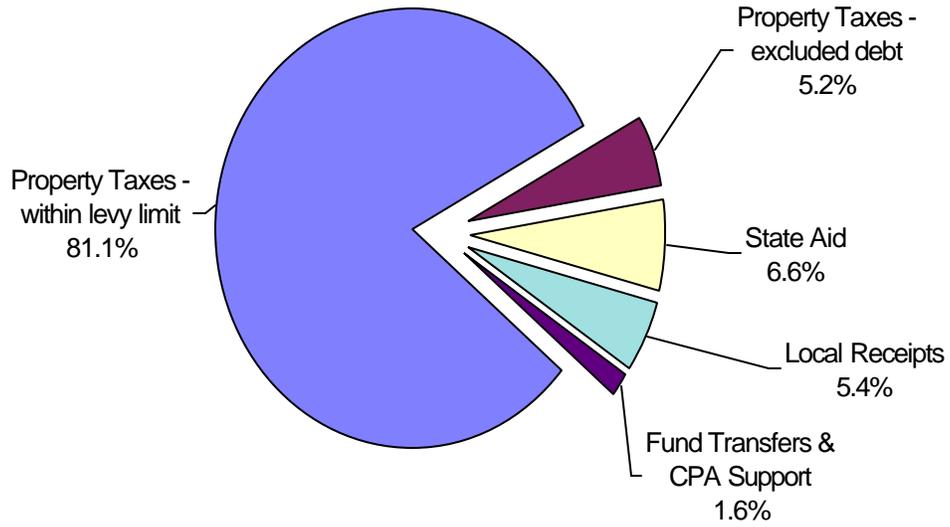
Given under our hands this 25th day of March in the Year of Our Lord 2008.

BOARD OF SELECTMEN

Timothy F. Hult
William R. Tice Jr.
John D. Williams
Alan C. Carpenito
Douglas A.G. Stevenson

REVENUES & EXPENDITURES

Sources of Revenue
FY'09 Balanced Budget (Assumes Passage of All Articles)



Expenditures by Category
FY'09 Balanced Budget (Assumes Passage of All Articles)

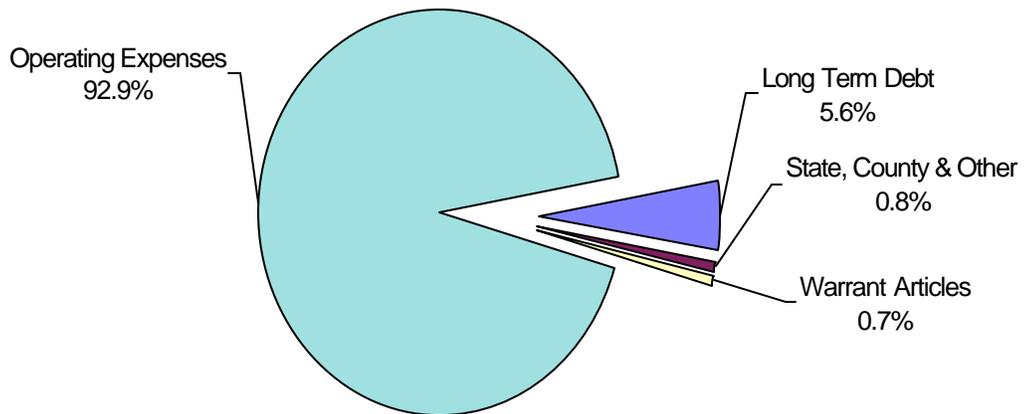


Table II – LONG TERM DEBT SERVICE

	<u>FY'08</u>	<u>FY'09</u>	FY'08/FY'09
	<u>Budget</u>	<u>Budget</u>	% Change
Long Term Debt Service			
Original Issue			
6/15/97 Town Hall	125,600	120,650	-3.9%
6/15/99 Town Hall	6,380	6,160	-3.5%
6/15/99 Ambulance	10,440	0	-100.0%
6/15/99 Athletic Fields	51,040	49,280	-3.5%
6/15/99 School	212,750	206,749	-2.8%
6/15/99 School	20,778	20,179	-2.9%
6/15/00 Wang Coombs	185,264	164,666	-11.1%
6/15/00 Library	126,242	122,392	-3.1%
7/1/02 School – Air quality systems	23,875	23,175	-2.9%
7/1/02 Fire Dept. - Ladder Truck	95,500	92,700	-2.9%
4/5/06 School – Wastewater Treatment	206,167	205,036	-0.6%
4/5/06 Pathways	35,550	34,200	-3.8%
4/5/06 Land (Benfield Parcel A)	179,890	184,770	2.7%
Total Long-Term Debt Service – Carlisle	<u>1,279,476</u>	<u>1,244,905</u>	<u>-2.7%</u>
Net CCHS Excluded Debt – Carlisle	<u>185,420</u>	<u>268,437</u>	<u>44.8%</u>
Long Term Debt	1,099,586	1,060,135	-3.6%
SBAB CPS Reimbursement	(137,807)	(137,807)	0.0%
Short Term Interest	28,087	32,500	15.7%
Wang Coombs Stabilization Transfer	(14,948)	(14,948)	0.0%
CCHS Debt – Carlisle	185,420	268,437	44.8%
Amortization of Premiums & Grants	(20,977)	(20,977)	0.0%
Paid by CPA contribution	(179,890)	(184,770)	2.6%
Net Excluded Debt – Carlisle	<u>1,131,125</u>	<u>1,187,340</u>	<u>4.9%</u>
Total Capital Exclusion – Carlisle	<u>152,000</u>	<u>0</u>	<u>-100.0%</u>

Long Term Debt Service FY'09 thru FY'27

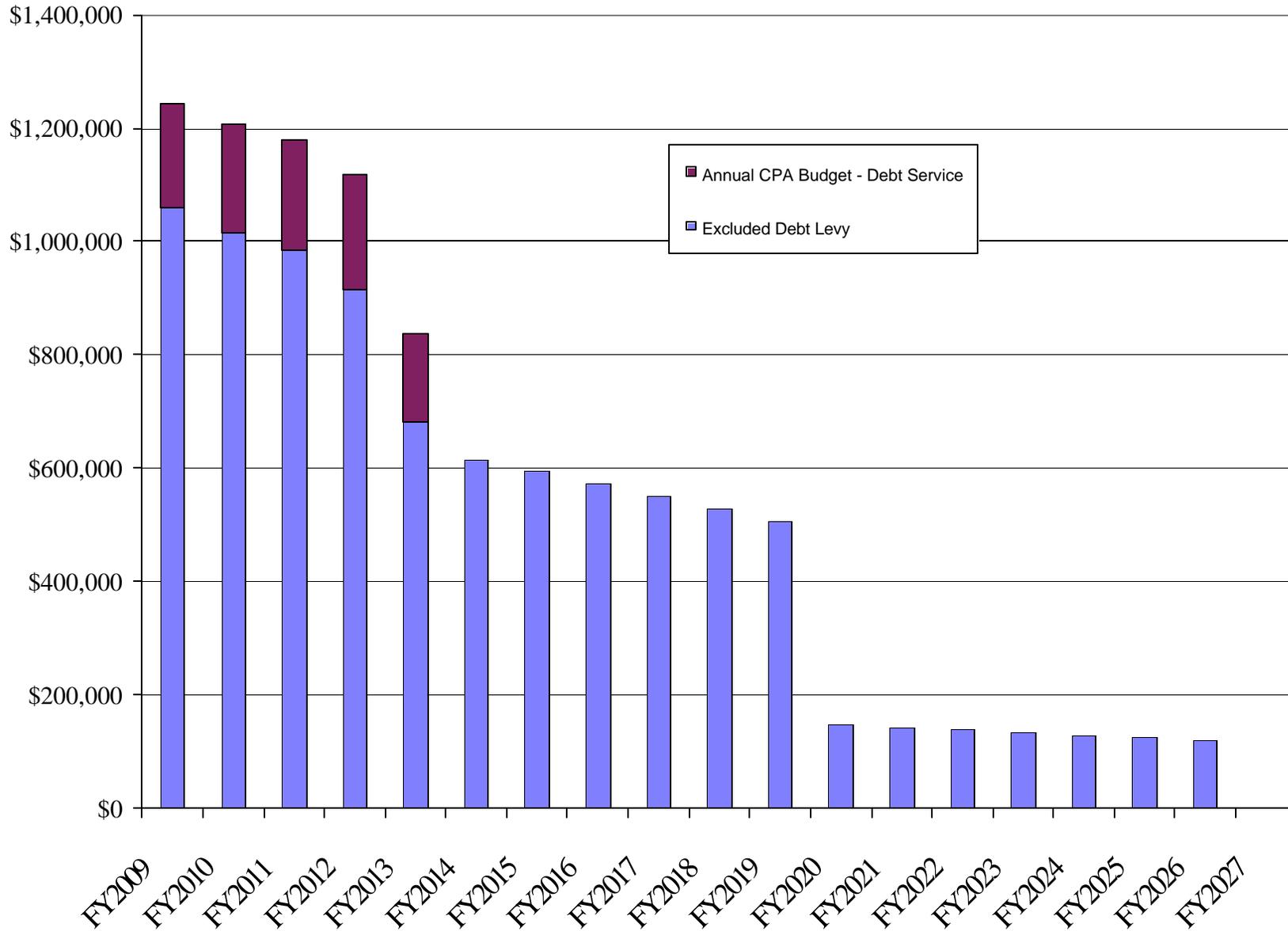


Table III - LONG-TERM CAPITAL REQUIREMENTS FY'10 – FY'13

<u>Department</u>	<u>Project/Program</u>	<u>FY10</u>	<u>FY11</u>	<u>FY12</u>	<u>FY13 or unknown</u>
Carlisle Schools	Robbins/Wilkins exterior paint	35,000			
	Gymnasium Locker Replacement/Repair	30,000			
	Wilkins Student Lockers	7,500			
	Auditorium A/V upgrades	20,000			
	Roof Repair - Spalding	10,000	10,000		
	Corey Water Infiltration Repairs	10,000	10,000		
	Annual Maintenance (misc projects)	25,000	25,000	25,000	25,000
	Annual Furniture Replacement	7,500	7,500	7,500	7,500
	Technology Replacement	100,000	100,000	100,000	100,000
	School Management Software (backend)			25,000	
	Security System - Highland				5,000
	Wilkins Alarm System				9,000
	Master Clock				8,000
	Dishwasher Replacement				30,000
	Security Upgrades - exterior Access				70,000
	Auditorium Seat refurb			TBD	
	Auditorium Curtain replace/refurb				TBD
CCRS	Upgrade Existing Lighting	30,000			
	Window Wall Replacement	90,000			
	Replace Auditorium Curtains	13,500			
	Replace Bathroom Partitions	22,500			
	Refurbish Exhaust Ventilation Units	22,500			
	Upgrade Electric Power for Technology	67,500			
	Replace Gym Roof	115,500			
	Replace Main Roof		544,500		
	Rooftop Heating Units		60,000		
	Replace Air Handlers		210,000		
	Replace Water Pipes and Faucets			796,500	
	Repace Walkways and Center Island Curbing				39,000
	Courtyard Renovation				25,500
	Repave Parking Lot				45,000
	Replace Additional Lockers				19,500
A/C in L Wing and Band				75,000	
Air Conditioning Comp. & Chiller				67,500	
Note: CCRSD items at Carlisle's Share (approximately 30%)					
DPW	Sand & Dump Truck ('79)	110000			
	Roll-off truck		115000		
	One Ton Dump Truck ('96)			47000	

<u>Department</u>	<u>Project/Program</u>	<u>FY10</u>	<u>FY11</u>	<u>FY12</u>	<u>FY13 or unknown</u>
	Sweeper			100000	
	Big Dump Truck				95000
	Tractor w/ Road Side Mower				75000
	DWP Roof	TBD			
	Salt Shed Replacement			TBD	
Fire	Protective Clothing	6500	6500	6500	6500
	Repave parking lot	50000			
	Fire Alarm Control Units	45000			
	Engine 6 (off-road) replacement	475000			
	SCBA bottles/packs replacement		36000		
	Carlisle 10 (F250) replacement			50000	
	Additional Tanker				450000
	Replace Water Rescue Boat				35000
	Generator replacement				50000
	Cisterns		200000		200000
Communications	Communications Cable		50000		
	Base Transmitter Replacement			20000	
Police	Cruiser Replacement	32000	32000	32000	36000
	Digital Radio	4000	4000	4000	
	New Boiler	13000			
	Fencing and Lighting in Rear			20000	
	Billing Software		11000		
Town Hall	ADA	5000	5000	5000	5000
	Generator for Corey/Emergency Shelter				450000
Library	Computer Replacement	10000		10000	
Finance	Payroll Software		40000		
Totals		1254500	1456500	1248500	1928500
Possibly part of a School Building Project					
	Corey Heating Units			325000	
	Corey Roof			840000	
	Wilkins Roof			320000	
	Robbins Roof			480000	

Town of Carlisle

Volunteer Response Form

GOOD GOVERNMENT STARTS WITH YOU

Town government needs citizens who are willing to give time in the service of their community. If you are interested in serving on a town committee or board, please fill out this form, indicating your preference and return to: *The Board of Selectmen, P.O. Box 827, Carlisle, Massachusetts 01741.*

Name: _____

Home Phone: _____

Address: _____

Occupation: _____

Background: _____

LIST IN ORDER OF PREFERENCE

PLANNING AND PRESERVATION

- Conservation Commission
- Planning Board Activities
- Board of Appeals
- Historical Commission
- Metropolitan Area Planning Council
- Other

RECREATION

- Recreation Commission
- Trails Committee
- Youth Commission
- State Park Advisory Committee
- Other

HOUSING

- Housing Authority
- Other

GENERAL GOVERNMENT

- Finance Committee
- Long-Term Capital Requirements
- Other

EDUCATION

- Scholarship Advisory Committee
- School Building Committee
- Other

OTHER

- Council on Aging
- Town Building Committee
- Bylaw Review Committee
- Cable TV Committee
- Animal Control Officer
- Hanscom Field Advisory Committee
- Americans with Disabilities Task Force
- Household Waste Committee
- Arts Council
- Memorial Day Committee

PERSONNEL

- Personnel Board
- Other

Help Promote Good Government By Serving Your Community

EVERYTHING YOU'VE ALWAYS WANTED TO KNOW ABOUT TOWN MEETING

By Carlisle 2000

Each qualified inhabitant of the town has an indisputable right to vote upon every question presented, as well as to discuss it, or there is no town meeting. This is universally understood as the vital feature of the town system of government as practiced from a long time before the Declaration of Independence until the present. -Opinion of the Justices, 229 Mass. 601, 1918

Town Meeting is a gathering of all people in the town who are eligible to vote. Voters who do not attend must abide by the decision of those who do attend. Its decisions affect the lives and pocketbooks of all the citizens, therefore, there are very special requirements, which must be followed in calling and conducting the meeting. Failure to meet these requirements may invalidate the action of the meeting.

Important items of business of the town meeting are:

1. Deciding what officers the town shall have, what salary it will pay for these officers and their terms of office.
2. Electing citizens to fill these offices.
3. Deciding for what purposes the town will spend money and how much may be spent for each purpose.
4. Adopting and changing bylaws to govern the conduct of business.
 - a. Regulating the government of the town, i.e., the conduct of town meetings
 - b. Regulating the organization and procedures for administration of town business
 - c. Regulating the conduct of citizens
 - d. Regulating the use of land
 - e. Regulating certain occupations

Only registered voters are admitted to the floor of the meeting. Visitors are customarily permitted to observe the meeting, but are separated from the voters. A quorum must be attained before the meeting is called to order.

The Moderator presides at Town Meeting, keeps order and makes a public declaration of all votes. She presents the articles in the order in which they appear on the Warrant. She first reads the article, then, calls for a motion, which is customarily made by the sponsor of the article. If money is involved, the Finance Committee is given an opportunity to state its recommendations early in the discussion. Any voter may discuss an article, may amend an article, amend an amendment, and vote on all motions and amendments.

The Warrant. Every town meeting is called by the issuing of a warrant. The warrant is a legal document that notifies the voters and states (1) the time of the meeting, (2) the place of the meeting, (3) the business to be taken up at the meeting.

Voting. Although most matters are settled with simple voice votes, there are times when a voice vote is not sufficient. If the vote is questioned, the moderator may appoint tellers and then ask for a rising vote or a show of hands to be counted by the tellers. On matters which require an unusual majority - such as a two-thirds vote to borrow money - the vote must be counted unless it is unanimous.

GLOSSARY OF TERMS

Conservation Fund: Raised by the Town and expended by vote of the Conservation Committee for land purchases or any other conservation use. This fund may be invested and accrue interest.

Capital Exclusion: A town may assess taxes in excess of its Levy Limit by voting a Capital Exclusion. Capital exclusions do not become part of the Levy Limit base but increase the property tax for only the year in which they are passed. This can be used only for capital outlay expenditures.

Chapter 90: Chapter 90 is a 100% reimbursable program. Each year an amount approved by the State is authorized at Town Meeting to be expended for maintaining, repairing, improving, and constructing Town roads and bridges (pathways are also included) that qualify under State Aid Highway Guidelines. All projects must be pre-approved by the State and work completed before the State will reimburse the Town 100% for its expenditures.

Community Preservation Act: The Community Preservation Act is statewide enabling legislation to allow cities and towns to levy a property tax surcharge of up to 3.0% on real property for the purpose of creating a local community preservation fund and qualifying for state matching funds. Carlisle voted to levy a 2% surcharge. CPA funds can be used to acquire and protect open space, preserve historic buildings and landscapes, and create and maintain affordable housing. Annually, at least 10 percent of the funds must be earmarked for each of these areas with the remaining 70 percent available to allocated among the three areas, plus active recreation, or set aside for future spending.

Debt Exclusion: A town may assess taxes in excess of its Levy Limit by voting a Debt Exclusion. Debt exclusions are temporary property tax increases. The amount of this excluded debt does not become part of the Levy Limit base but is added on for the duration of the debt. Most of Carlisle's bonded indebtedness is excluded debt outside the levy limit.

Free Cash: A budgetary fund balance built up over time if town receipts exceed expenditures. Once a year the Town's Free Cash balance is certified by the State (reserving amounts we know have been committed to spend), and this balance can be used to reduce the tax levy. Credit rating agencies and other members of the financial community use this, in conjunction with a Stabilization Fund and other factors, to make judgments regarding a community's fiscal stability.

Levy: The total amount the Town raises through property taxes.

Levy Limit: This is the maximum amount a community can raise through taxes without an override. Under Proposition 2 1/2 the Levy can be raised only 2 1/2 % over the previous year's Levy plus an amount reflecting new growth in the total tax base in the Town. The Assessors must document this new growth and receive approval from the Department of Revenue before it can be added. A town may also increase its levy limit by voting an override.

Long Term Debt: Loans and obligations with a maturity of longer than one year; usually

accompanied by interest payments. Long Term Debt represents a commitment of taxable resources over the period of debt repayment. In Town budgets it represents a line item expense that local governments must budget to support voted debt.

New Growth: The taxing capacity added by new construction and other increases in the property tax base. New Growth is calculated by multiplying the value associated with the new construction by the tax rate of the previous fiscal year. Increases as a result of revaluation or appreciation do not factor into new growth.

Override: A Levy Limit Override provides a community with flexibility to levy more than their levy limit and is used to obtain additional funds for annual operating budgets and fixed costs. An Override is a permanent increase in the amount of property taxes a community may levy. The Override becomes a permanent part of the Levy Limit base in future years.

Proposition 2 1/2: A State law that restricts the amount of taxes that a City or Town can raise and the amount taxes can increase each year without an override.

Regional School Debt: Under Proposition 2 ½ a member of a regional governmental unit may exclude its assessed share of debt service on district borrowings. This form of debt exclusion is proportionally assessed to each community over the life of the debt. It does not become part of the Levy Limit base.

Reserve Fund: This fund is established by the voters at the Annual Meeting and may be added to at a Special Town Meeting. It may not exceed 5% of the tax levy of the preceding year. Transfers from this fund are within the exclusive control of the Finance Committee and are for “extraordinary or unforeseen expenditures” by various town departments.

Revolving Fund: A Revolving Fund allows the town to receive revenues for a specific service, which can then be used for that specific purpose without appropriation. Revolving Funds must be reauthorized by town meeting each year and a limit on the total amount that can be spent from each fund is established at that time.

Stabilization Fund: A stabilization fund is analogous to a bank account, town meeting can appropriate (make deposits) into for use at a future time. Sometimes seen as a “rainy day” fund, this fund is used to stabilize the financial picture of the community and can be appropriated from by a two-thirds vote at town meeting for any legitimate municipal purpose. Credit rating agencies and other members of the financial community use this, in conjunction with Free Cash and other factors, to make judgments regarding a community’s fiscal stability.

Tax Rate: The dollars paid by the taxpayer per thousand dollars of the taxpayer’s assessed property value.

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