

Town of Carlisle



TOWN WARRANT

With Finance Committee & Long Term
Capital Requirements Committee
Recommendations

and Including Four-Year Capital Summary Plan

Finance Committee Hearing on the Warrant

Monday, April 13, 2015
Heald Room, Town Hall, 7:00 p.m.

Annual Town Meeting

Monday, April 27, 2015
Corey Auditorium, 7:00 p.m.

Town Elections

Tuesday, May 5, 2015
Town Hall
Polls Open 7:00 a.m. to 8:00 p.m.

Please bring this report with you to Town Meeting

Town of Carlisle

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To the Voters of Carlisle:

The Carlisle Finance Committee has completed its budget review and presents its recommendations concerning the Fiscal Year 2016 (“FY16”) 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 attached 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 (CCRSB).

The Town is in the fourth year of paying down substantial amounts of debt from our two school building projects. The new high school significantly impacts this year’s budget as the full amount of the debt service starts. This will also be the second year of partially funding our OPEB (Other Post Employment Benefits) obligation which is essentially the cost of healthcare benefits for current and future retired town employees. In addition, we expect new growth to continue at the same level as the past several years, after an above average year in 2015. The Finance Committee does not expect the pressure on the budget to abate in the near future, as rising costs are expected to continue to exceed revenue from new growth. Because the Town relies on real estate tax for nearly all of its revenue, the slowdown in residential construction affects Carlisle more than other Commonwealth towns. On the positive side, Carlisle is less dependent on state aid than most communities.

Revenue

The Finance Committee forecasts that FY16 revenue from all sources available will grow by 4.18% over FY15. This includes property taxes as well as fund transfers (including free cash). We expect revenue raised through the property tax and excluded debt levy will grow by 3.2%, including “new growth”, while state aid and local receipts are expected to remain unchanged from the prior year.

Transfers from our free cash balance are also considered revenue. Generally, the Finance Committee only recommends the use of free cash, which consists of un-expended budget appropriations, for “one-time” expenses and not to support ongoing operational items. Free cash does not permanently increase the levy limit. The following uses of free cash are being considered in this years’ warrant articles.

- \$440,000 to support the increase in debt service incurred by the two school building projects.
- \$300,000 to support the Long Term Capital Committee’s request list - above the amount raised by taxes.
- \$100,000 to continue funding of the OPEB, above the levy amount
- \$50,000 to support separate articles involving studies on the Fire Department, Town Facilities, and town use of technology.

If all of the articles in the warrant were to pass at town meeting, we are proposing a transfer of \$890,000 from free cash to pay for them and reduce the burden on taxpayers. If an article does not pass, the related free cash amount would not be used and would then correspondingly increase the final level of free cash.

This will leave the Town with over \$2,108,640 in free cash before the July 1, 2015 certification, which, along with more than \$1,000,000 in the Stabilization Fund, represents a prudent reserve for future operational and capital expansion needs, particularly the increase in debt service spending in FY2017 for the high school.

Levy Limit Spending

Total operational spending within the levy limit increases 4.79% as compared with FY15 (See table 1). The debt service for the town, not including the high school, increases slightly by 1.25% in FY16. The FY16 long term capital budget is higher than normal at \$401,130 as the town continues to maintain and improve its infrastructure. We also have committed to continue funding our OPEB liability (healthcare costs for retired town employees) with a second year levy amount of \$125,000 that continues our plan to increase the annual appropriation by \$25,000 each year to address the Town's unfunded liability of roughly \$9.8 million.

Excess Levy Capacity

For the third year in a row, the Town has significant excess levy capacity. Proposition 2 1/2 places a limit on the amount of tax the Town can levy without an override. In past years, the Town has levied taxes up to this limit. Because of the decrease in the Town's CCRSD assessment, slowed growth in health insurance and retirement costs, prudent and careful spending by town departments, and the application of free cash to reduce debt service, FY16's balanced budget requires an estimated \$2,070,622 less than the levy limit allows.

Operating Budget

The Town operating budget breaks down as follows:

The balanced budget for education will increase by 5.7%, which reflects a 4.3% increase in the CPS budget, and an increase in Carlisle's assessment for CCRSD for operations and debt service of 9.8%. Although Carlisle's assessment ratio has decreased again this year, and therefore our share of operational costs has decreased, we will continue to see an overall increase in the debt service associated with the new building project at the high school. Our portion of the cost for the CCRSD debt service increases 83.2% from \$684,033 in FY15 to \$1,253,485. The assessment for the Minuteman Regional School District (MMRSD) is down 28.2%, representing a dollar decrease of \$101,216. This decrease is due to primarily to a decrease in the enrollment of Carlisle students.

Most non-education Town departments were held flat against FY15 with the exception of salary increases due to contractual obligations and/or cost of living adjustments. The Finance Committee supported larger percentage increases in the Fire Department, primarily for compensation incentives.

- Fire \$30,274 7.1%

Debt and Capital Exclusions

The proposed Warrant Articles includes two debt exclusion questions for FY16, neither of which affects the budget for FY16. The first is for Carlisle's share of the debt to be incurred by CCRSD for the purchase of four school buses. The second is for the proposed purchase of a \$650,000 fire truck.

Debt

In FY16, the net excluded debt levy will increase by 27.53% to \$2,734,171 due mainly to the debt service from our portion of the new high school debt.

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 is expected to remain below historic levels
- State aid may continue to decrease as the Commonwealth struggles with its own budget issues
- Debt service due to the completion of the new CPS building and construction at CCHS will reach a peak in Fiscal Year 2016 and remain at high levels for 4 more years before starting to decline

The Finance Committee and the Board of Selectmen have sought new sources of revenue and alternative ways to deliver Town services. Some of the focal points continue to be:

- New, nontraditional sources of revenue
- Sharing with, or purchasing services from, adjacent towns
- Sharing resources and staff between town departments.

The Finance Committee continues to work hard to balance, in a prudent way, the needs of the town and the demands placed on taxpayers to fund the town.

We welcome citizen input into the process beyond the annual Town Meeting and its associated hearings. Committee meetings are posted at Town Hall and in the [Mosquito](#) and we urge you to attend or e-mail your thoughts to us at

fincom@carlisle.mec.edu.

We invite you to review the material in this booklet and attend the Finance Committee hearing on the Warrant at 7:00 pm in the Town Hall on Monday, April 13th.

Sincerely,

The Carlisle Finance Committee

Michael Bishop, Chair
Kevin Perkins, Vice Chair
Jim Darr
Karen Huntress
Peter Karle
Jerome Lerman
Scott Triola

**Table 1 - Town of Carlisle Finance Committee
FY'16 Summary Budget Presentation**

SUMMARY

	<u>FY'15 Budget</u>	<u>FY'16 Levy Limit Operating Budget</u>	
		<u>Budget</u>	<u>% Change from FY'15</u>
Projected Revenue:			
Property Taxes - Prop. 2 1/2 levy limit	23,215,359	24,080,744	3.7%
Excess levy capacity	(1,393,888)	(2,070,622)	48.6%
Net Property Tax Levy	\$21,821,471	\$22,010,122	0.9%
Property Taxes - excluded debt	2,143,954	2,734,171	27.5%
Property Taxes - capital exclusion	-	-	
State aid	1,220,829	1,220,829	0.0%
Local Receipts	1,219,700	1,219,700	0.0%
Fund Transfers	645,893	997,793	54.5%
Total Projected Revenue	27,051,847	28,182,615	4.2%
Expenditures:			
State, County & Other	159,787	163,500	2.3%
LTCRC Warrant Articles	386,355	401,130	3.8%
Operating Budgets			
General Government	1,149,181	1,191,855	3.7%
Protection of Persons & Property	2,283,187	2,380,577	4.3%
Board of Health	88,822	91,085	2.5%
Public Works	1,110,880	1,130,719	1.8%
Public Assistance	204,026	219,791	7.7%
Education	16,859,206	17,826,518	5.7%
Library	574,053	594,064	3.5%
Recreation	147,282	149,990	1.8%
Insurance & Benefits	1,505,000	1,480,000	-1.7%
Unclassified	152,000	152,000	0.0%
County Retirement	726,609	771,117	6.1%
Debt Service	1,516,884	1,535,869	1.3%
Total Operating Budgets	26,317,130	27,523,585	4.6%
Capital Exclusion	-	-	
Separate Articles	188,575	94,400	-49.9%
Total Budgeted Expenditures	27,051,847	28,182,615	4.2%
Surplus/(Deficit)	\$ -	\$ -	

**WARRANT
ANNUAL TOWN MEETING – APRIL 27, 2015
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 Twenty-seventh of April 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:

CONSENT AGENDA

In an effort to streamline Town Meeting and therefore to make it more inviting to voters, the Board of Selectmen has decided to continue with the concept of the Consent Agenda. This agenda speeds the passage of Articles that the Selectmen anticipate, in consultation with the Moderator and Finance Committee, are likely to generate no controversy and can be properly voted on without debate. The purpose of the Consent Agenda is to allow these Articles to be acted upon pursuant to a single motion, and to be passed without debate.

THE TOWN WILL BE ASKED TO APPROVE THE USE OF A CONSENT AGENDA UNDER ARTICLE 1.

Should the Town approve the use of a CONSENT AGENDA, the Selectmen have voted to recommend that the following Articles be acted upon under the Consent Agenda: Articles 2, 3, 4, 5, 6, 7 and 8. The Articles to be taken up under the Consent Agenda are indicated by a double asterisk (**).

At the call of the Consent Agenda, the Moderator will call out the numbers of the Articles, one by one. If one or more voters object to any particular Article being included in the

Consent Agenda, please say the word “Hold” in a loud voice when the number is called. The Article will then be automatically removed from the Consent Agenda and restored to its original place in the Warrant, to be debated and voted upon in the usual manner. After the calling of the individual items in the Consent Agenda, the Moderator will entertain a SINGLE MOTION that all items remaining on the Consent Agenda be acted upon favorably by the voters.

Please carefully review the list of proposed Articles, which appears in the printed Warrant Book that is mailed to each home. If you have any questions about the consent articles or procedure, please contact the Town Administrator at 978-371-6688 before Town Meeting.

ARTICLE 1 – Consent Agenda: To see if the Town will vote to adopt certain procedures to govern the conduct of the 2015 Annual Town Meeting, or to take any other action related thereto. (BOARD OF SELECTMEN)

ARTICLE 2 - Town Reports:** To hear and act upon the reports of Town Officers, Boards, Committees, Commissioners, and Trustees, or to take any other action related thereto. (BOARD OF SELECTMEN)

ARTICLE 3 - 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 M.G.L. c. 41, § 108, as amended, for the Fiscal Year 2016, beginning July 1, 2015, or to take any other action related thereto.

	<u>Voted FY'14</u>	<u>Voted FY'15</u>	<u>Recommended FY'16</u>
Moderator	\$50	\$50	\$50
Town Clerk	\$57,063	\$58,204	\$59,543
Assessors -			
Chairman	\$100	\$100	\$100
Second Member	\$100	\$100	\$100
Third Member	\$100	\$100	\$100

(BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 3.

ARTICLE 4 – Actuarial Valuation of Post-Employment Benefits:** 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 spent 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 to take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: The Finance Committee recommends raising and appropriating \$4,000 to be spent by the Board of Selectmen for professional services connected with the Actuarial Valuation. The intent of this article is to plan for and budget a portion of the cost for the actuarial valuation that must be done every two years by the Treasurer.

ARTICLE 5 – Revaluation **: 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 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)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 5 for \$5,000 to be spent by the Board of Assessors for professional services connected with 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 6 - Department Revolving Funds Authorization **: To see if the Town will vote to authorize or reauthorize certain revolving funds, as set forth below, pursuant to M.G.L. c. 44, § 53E ½ for the Fiscal Year 2016, beginning July 1, 2015, or to take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

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	Transfer Station recycling expenses and household hazardous waste collection /disposal	\$40,000
Trails Committee	Sale of Trails in Carlisle Book	Board of Selectmen	Building, maintaining and enhancing recreation trails.	\$10,000
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.	\$10,000
Building Department	User Fees	Board of Selectmen	To cover inspectional services and administrative expenses.	\$100,000

Council on Aging	User Fees	Council on Aging	To provide for expenses for activities, programs and events sponsored by the Council on Aging.	\$25,000
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***Finance Committee Recommendation:** The Finance Committee recommends authorizing the following revolving special revenue funds, as specified in Article 6: School buses, Board of Health, Hazardous Wastes, Trails Committee, 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.*

ARTICLE 7 – Real Estate Tax Exemption **: To see if the Town will vote to authorize the Board of Assessors, pursuant to M.G.L. c. 59, § 5 (clause 41C), to grant an additional real estate tax exemption of up to one hundred percent (100 %) of the amount permitted by this statute, or to take any other action related thereto. (BOARD OF SELECTMEN/BOARD OF ASSESSORS)

***Finance Committee Recommendation:** The Finance Committee recommends authorizing the Board of Assessors to grant this exemption.*

ARTICLE 8 - FY 2016 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 M.G.L. c. 90, or to take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

***Finance Committee Recommendation:** The Finance Committee recommends appropriating Chapter 90 funds 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 9 – Fiscal Year 2015 Budget Transfers: To see if the Town will vote to transfer sums of money into various line items of the Fiscal Year 2015 operating budget from other line items of said budget, from unexpended funds in various accounts or from other available funds. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

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

ARTICLE 10 – FY16 Operating Budget: 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 fund the various departments, boards, commissions, and operating expenses of the Town for the Fiscal Year 2016, beginning July 1, 2015, or to take any other action related thereto. (BOARD OF SELECTMEN/FINANCE COMMITTEE)

Finance Committee Recommendation: *The Finance Committee recommends approval of a total FY2016 Operating Budget of \$27,523,585 as further detailed below:*

Article 10

	FY 2015 Budget	FY 2016 Levy Limit Budget
General Government	1,149,181	1,191,855
Protection of Persons & Property	2,283,187	2,380,577
Board of Health	88,822	91,085
Public Works	1,110,880	1,130,719
Public Assistance	204,026	219,791
Education	16,859,206	17,826,518
Library	574,053	594,064
Recreation	147,282	149,990
Insurance & Benefits	1,505,000	1,480,000
Unclassified	152,000	152,000
County Retirement	726,609	771,117
Long Term Debt	1,516,884	1,535,869
Total	26,317,130	27,523,585

General Government

	FY 2015	FY 2016
	Budget	Levy Limit
	Budget	Budget
General Government		
General Expense & Town Hall	726,246	755,426
Citizen Recognition	275	275
Treasurer/Collector	144,677	151,547
Town Clerk	70,469	72,070
Registrars & Elections	13,723	13,988
Assessors	107,405	109,789
Planning Board	86,386	88,760
sub-total	1,149,181	1,191,855

General Expenses & Town Hall: *The Finance Committee recommends a balanced budget appropriation of \$755,426 for this budget item.*

Citizen Recognition: *The Finance Committee recommends a balanced budget appropriation of \$275 for this budget item.*

Treasurer/Tax Collector: *The Finance Committee recommends a balanced budget appropriation of \$151,547 for this budget item.*

Town Clerk: *The Finance Committee recommends a balanced budget appropriation of \$72,070 for this budget item.*

Registrars and Elections: *The Finance Committee recommends a balanced budget appropriation of \$13,988 for this budget item.*

Assessors: *The Finance Committee recommends a balanced budget appropriation of \$109,789 for this budget item.*

Planning Board: *The Finance Committee recommends a balanced budget appropriation of \$88,760 for this budget item.*

Protection of Persons and Property

	FY 2015 Budget	FY 2016 Levy Limit Budget
Protection of Persons & Property		
Police	1,368,980	1,422,264
Fire	427,072	457,346
Communications	324,487	332,046
Conservation	94,215	100,260
Dog & Animal Control	10,325	10,782
Inspectional Services	34,108	33,879
Street-Lighting	24,000	24,000
Sub-total	2,283,187	2,380,577

Police: *The Finance Committee recommends a balanced budget appropriation of \$1,422,264 for this budget item.*

Fire: *The Finance Committee recommends a balanced budget appropriation of \$457,346 for this budget item, with \$404,346 to be raised from taxation or other available funds of the town and \$53,000 to be transferred from the Ambulance Fund.*

Communications: *The Finance Committee recommends a balanced budget appropriation of \$332,046 for this budget item.*

Conservation: *The Finance Committee recommends a balanced budget appropriation of \$100,260 for this budget item.*

Dog & Animal Control: *The Finance Committee recommends a balanced budget appropriation of \$10,782 for this budget item.*

Inspectional Services: *The Finance Committee recommends a balanced budget appropriation of \$33,879 for this budget item.*

Street Lighting: *The Finance Committee recommends a balanced budget appropriation of \$24,000 for this budget item.*

Board of Health

	FY 2016	
	FY 2015	Levy Limit
	Budget	Budget
Board of Health	88,822	91,085

Board of Health: *The Finance Committee recommends a balanced budget appropriation of \$91,085 for this budget item.*

Public Works

	FY 2015	FY 2016
	Budget	Levy Limit
	Budget	Budget
Public Works		
DPW (incl. trees)	696,413	714,742
Snow & Ice	65,440	65,558
Transfer Station	260,611	262,003
Road Maintenance	88,416	88,416
sub-total	1,110,880	1,130,719

***DPW:** The Finance Committee recommends a balanced budget appropriation of \$714,742 for this budget item.*

***Snow & Ice:** The Finance Committee recommends a balanced budget appropriation of \$65,558 for this budget item.*

***Transfer Station:** The Finance Committee recommends a balanced budget appropriation of \$262,003 for this budget item.*

***Road Maintenance:** The Finance Committee recommends a balanced budget appropriation of \$88,416 for this budget item.*

Public Assistance

	FY 2015	FY 2016
	Budget	Levy Limit
	Budget	Budget
Public Assistance		
Youth Commission	2,806	2,872
Council on Aging	174,620	180,319
Senior Tax Voucher Program	25,000	25,000
Veteran's Agent and Benefits	1,600	11,600
sub-total	204,026	219,791

Youth Commission: *The Finance Committee recommends a balanced budget appropriation of \$2,872 for this budget item.*

Council on Aging: *The Finance Committee recommends a balanced budget appropriation of \$180,319 for this budget item.*

Senior Tax Voucher Program: *The Finance Committee recommends a balanced budget appropriation of \$25,000 for this budget item.*

Veteran's Agent: *The Finance Committee recommends a balanced budget appropriation of \$11,600 for this budget item.*

Education

	FY 2015	FY 2016
	Budget	Levy Limit
	Budget	Budget
Education		
Carlisle Public Schools	10,012,736	10,441,674
CCRSD	5,834,916	5,905,074
CCRSD debt service	684,033	1,253,485
MMRHS, including debt service	327,521	226,285
sub-total	16,859,206	17,826,518

Carlisle Public Schools: The Finance Committee recommends a balanced budget appropriation of \$10,441,674 for this budget item.

Concord Carlisle Regional High School (CCRSD): The Finance Committee recommends a balanced budget appropriation of \$5,905,074 for this budget item.

Concord Carlisle Regional High School (CCRSD) Debt Service: The Finance Committee recommends a balanced budget appropriation of \$1,253,485 for this budget item, with \$853,485 to be raised from taxation or other available funds of the town and \$400,000 to be transferred from Free Cash.

Minuteman Regional High School (MMRHS): The Finance Committee recommends a balanced budget appropriation of \$226,285 for this budget item.

Library

		FY 2016
	FY 2015	Levy Limit
	Budget	Budget
Library	574,053	594,064

***Library:** The Finance Committee recommends a balanced budget appropriation of \$594,064 for this budget item.*

Recreation

		FY 2016
	FY 2015	Levy Limit
	Budget	Budget
Recreation	147,282	149,990

***Recreation:** The Finance Committee recommends a balanced budget appropriation of \$149,990 for this budget item.*

Insurance & Benefits

	FY 2015	FY 2016
	Budget	Levy Limit
	Budget	Budget
Insurance & Benefits		
Blanket Insurance	205,000	205,000
Group Insurance and Mitigation	1,000,000	1,000,000
Contribution to OPEB Trust	250,000	225,000
Unemployment Insurance	50,000	50,000
sub-total	1,505,000	1,480,000

Blanket Insurance: *The Finance Committee recommends a balanced budget appropriation of \$205,000 for this budget item.*

Group Insurance & Mitigation: *The Finance Committee recommends a balanced budget appropriation of \$1,000,000 for this budget item.*

Contribution to OPEB Trust: *The Finance Committee recommends a balanced budget appropriation of \$225,000 for this budget item with \$125,000 to be raised from taxation or other available funds of the town and \$100,000 to be transferred from Free Cash.*

Unemployment Insurance: *The Finance Committee recommends a balanced budget appropriation of \$50,000.*

Unclassified

	FY 2015	FY 2016
	Budget	Levy Limit
Unclassified		
Interest, fees, & costs	1,000	1,000
Public Celebrations	1,000	1,000
Reserve Fund Balance	150,000	150,000
sub-total	152,000	152,000

***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 \$1,000 for this budget item.*

***Reserve Fund:** The Finance Committee recommends a balanced budget appropriation of \$150,000 for this budget item.*

County Retirement

	FY 2015	FY 2016
	Budget	Levy Limit
County Retirement	726,609	771,117

County Retirement: The Finance Committee recommends a balanced budget appropriation of \$771,117 for this budget item.

Long Term Debt Service

	FY 2015	FY 2016
	Budget	Levy Limit
Long Term Debt	1,516,884	1,535,869

Long Term Debt: The Finance Committee recommends a balanced budget appropriation of \$1,535,869 for this budget item with \$1,441,076 to be raised from taxation or other available funds of the town, \$14,945 to be transferred from the Stabilization fund, \$40,000 to be transferred from Free Cash, and \$39,848 to be transferred from the Reserve for Bond Premiums account.

ARTICLE 11 – Additional Appropriations: 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 expended by the Board of Selectmen for the purpose of retaining consultants to conduct studies, provide services and complete projects for the following departments:

<u>Department</u>	<u>Amount</u>	<u>Purpose</u>
Council on Aging	\$6,500	Social Worker
Assessors	\$5,000	Updates to GIS Maps
Conservation	\$3,900	Greenough Dam Design
Selectmen	\$10,000	Fire Department Study
Selectmen	\$20,000	Facilities Condition Study

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

Finance Committee Recommendation: The Finance Committee recommends approval of the appropriations in Article 11 with \$30,000 to be transferred from Free Cash and \$15,400 to be raised from taxation or other available funds of the town.

ARTICLE 12 – Approve/Fund Collective Bargaining Agreements: To see if the Town will vote to raise and appropriate or transfer from available funds a sum of money for the purpose of funding a successor collective bargaining agreement between the Town of Carlisle and the Carlisle Teachers’ Association, or to take any other action related thereto. (SCHOOL COMMITTEE)

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

ARTICLE 13 – Wage and Classification Study Adjustments: To see if the Town will vote to raise and appropriate the sum of \$20,000 for the purpose of funding wage/salary adjustments for Town non-union personnel or to take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 13.

ARTICLE 14 – CPA Annual Recommendations: 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 or conservation restrictions, and to take any other action related thereto. (COMMUNITY PRESERVATION COMMITTEE)

Summary of Motion 1 - FY'16 CPA Appropriations: That the following amounts be appropriated from the Fiscal Year 2016 Community Preservation Fund estimated revenues to the Community Preservation Fund accounts as follows:

- a. Fifty One Thousand Dollars (\$51,000) be appropriated to the Open Space Reserve Fund.
- b. Fifty One Thousand Dollars (\$51,000) be appropriated to the Community Housing Reserve Fund.
- c. Fifty One Thousand Dollars (\$51,000) be appropriated to the Historic Reserve Fund.
- d. Two Thousand Five Hundred Dollars (\$2,500) be appropriated for Administrative Expenses.
- e. Three Hundred Fifty Four Thousand Five Hundred Dollars (\$354,500) be appropriated to the fiscal year 2016 Community Preservation Budget Reserve account.

Summary of Motion 2 (FY'15):

To rescind \$50,000 of the appropriation approved under Article 19, Motion 2, of the April 28, 2014 Annual Town Meeting to the Carlisle Affordable Housing Trust (“CAHT”), and returning the rescinded funds to the Community Housing Reserve Fund in fiscal 2015.

Summary of Motion 3 (FY'15):

To rescind the appropriation of \$25,000 under Article 24, Motion 6 of the May 5, 2011 Annual Town Meeting, as it relates to the appropriation to the Carlisle Recreation Commission for the design of an athletic field on Benfield land, approved under Article 20, Motion 9 of the May 23, 2005 Annual Town Meeting.

Summary of Motion 4 (FY'15):

To amend Article 21, Motion 4 of the May 10, 2010 Annual Town Meeting, to change the expiration date from June 30, 2015 to June 30, 2018, pertaining to expenditures for the creation and preservation of open space and land for recreation use through planning and construction of new boardwalks, bridges, kiosk and signs constructed by the Carlisle Trails Committee on public lands in Carlisle.

Summary of Motion 5 (FY'15):

Appropriate \$52,000 from the Historic Reserve Fund to the Carlisle Public Library, for the preservation and conservation of historic artifacts. Any appropriation not expended by June 30, 2017 shall be returned to the Historic Reserve Fund.

Summary of Motion 6 (FY'16):

Appropriate \$400,000 (\$100,000 from the Open Space Reserve Fund and \$300,000 from the Undesignated Fund Balance) in FY'16 to CC at Play for the development of recreational facilities at the Concord-Carlisle Regional High School. Any appropriation not expended by June 30, 2018 shall be returned to the CPA Undesignated Fund.

Summary of Motion 7 (FY'16):

Appropriate \$50,000 from the Community Housing Reserve Fund in FY'16 to the Carlisle Affordable Housing Trust ("CAHT") to provide community education and to support planning efforts related to a proactive response to Chapter 40B, to support the development of Community Housing by identifying, analyzing, and possibly securing options to purchase property or properties for possible future acquisition by the Town of Carlisle, and by providing support to developers of Community Housing projects deemed to be consistent with local needs. Any appropriation not expended by June 30, 2018 shall be returned to the Community Housing Reserve Fund.

Summary of Motion 8 (FY'16):

Appropriate \$6,000 from the Historic Reserve Fund to the Carlisle Town Clerk for the preservation of historic records. Any appropriation not expended by June 30, 2016 shall be returned to the Historic Reserve Fund.

Beginning in FY15, the Community Preservation Committee began to require the execution of grant agreements with all recipients of CPA funding. The proposed appropriations listed above in Motions 5,6,7, and 8 will be subject to grant agreements. Summaries of those grant agreements can be found on pages 32-35 immediately following the Annual Town Meeting warrant. The complete text of the grant agreements can be found on the Town Meeting page of the Town's website at: http://www.carlislema.gov/Pages/CarlisleMA_Townmeetings/index.

Finance Committee Recommendation: *The Finance Committee takes no position on Article 14.*

ARTICLE 15 – Capital Equipment: 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 for various capital purposes, or provide by any combination of these methods, or take any other action related thereto. (LONG TERM CAPITAL REQUIREMENTS/BOARD OF SELECTMEN)

Long Term Capital Requirements

FY'16

		Amount	Appropriation Expires
CPS	Technology Replacement	80,000	June 30, 2018
CPS	Annual Maintenance	25,000	June 30, 2018
CPS	Auditorium Seat Refurbishment	20,000	June 30, 2018
Police	Cruiser Replacement (2)	82,000	June 30, 2018
Police	Roofing Repair/Replacement	24,630	June 30, 2018
Police	Computer & Technology Replacement	4,000	June 30, 2018
Fire	Miscellaneous Maintenance Projects	5,000	June 30, 2018
Fire	Computer replacement	2,500	June 30, 2018
Fire	Vehicle Replacement	38,000	June 30, 2018
DPW	Snow Plow Equipment for New Truck	20,000	June 30, 2018
Library	Misc. Maintenance Projects	5,000	June 30, 2018
Library	Computer & Technology Replacement	4,000	June 30, 2018
Library	HVAC Repairs	60,000	June 30, 2018
Town Hall	Technology Upgrades	5,000	June 30, 2018
Town Hall	Major Repairs/Replacement	10,000	June 30, 2018
Recreation	Tennis Court Renovations	16,000	June 30, 2018
	TOTAL	401,130	

(BOARD OF SELECTMEN/LONG TERM CAPITAL REQUIREMENTS COMMITTEE)

Combined Finance Committee and Long Term Capital Requirements Committee

Recommendations: Both Committees recommend approval of the preceding amounts for the items described under Article 15 for \$401,130, with \$101,130 to be raised from taxation or other available funds of the town, \$300,000 to be transferred from Free Cash, and further that after June 30, 2018, any residual unexpended portion of any list appropriation shall be returned to the General Fund.

ARTICLE 16 - Capital Funding for Technology: To see if the Town will vote to transfer from undesignated fund balance the sum of \$20,000 for the purpose of funding for technology capital projects, or to take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 16 and that the source of the \$20,000 funding should be Free Cash.

ARTICLE 17 - New CCRSD School Buses: To see if the Town will vote to approve \$400,000, or any other sum of debt authorized by the Concord-Carlisle Regional School Committee for school bus replacement, or take any other action related thereto. (BOARD OF SELECTMEN)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 17.

ARTICLE 18 – Borrowing Authorization – Fire Department Tanker Truck (DEBT EXCLUSION): To see if the Town will vote to raise and appropriate, transfer from available funds or borrow, pursuant to any applicable statute, \$650,000 to provide funding, to be expended by the Board of Selectmen, to purchase a new tanker truck for the Carlisle Fire Department, provided that such amount shall be contingent upon successful passage of a debt exclusion referendum pertaining thereto on a Town Ballot, or take any other action related thereto. (BOARD OF SELECTMEN/LONG TERM CAPITAL REQUIREMENTS COMMITTEE)

Finance Committee Recommendation: The Finance Committee recommends approval of Article 18.

ARTICLE 19 - PEG ACCESS AND CABLE-TELEVISION RELATED FUND: To see if the Town will vote to accept the provisions of M.G.L. c. 44, § 53F¾ and to authorize the Town Accountant to create a separate account on the Town's books to be known as the PEG Access and Cable-Related Fund into which shall be credited funds received in connection with the cable television franchise agreement between the Town and Comcast Corporation (Comcast), or any other cable provider, said funds to be used only for cable-related purposes consistent with the franchise agreement; and further, to appropriate the sum, or any other sum estimated to be received from Comcast during the fiscal year commencing July 1, 2015 (FY16); and further to appropriate and transfer from the current Comcast account any amounts received from Comcast in FY15 and not previously expended for PEG Access prior to the establishment of the PEG Access and Cable-Related Fund and to appropriate as a current year appropriation said amount from the Fund, to be expended under the direction of the Board of Selectmen for such PEG access services; and further to authorize the Board of Selectmen to enter into a long-term

contract of up to ten years or such lesser term as the Board of Selectmen shall determine to be in the best interest of the Town for the provision of PEG community access television services; or take any other action related thereto. (BOARD OF SELECTMEN)

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

ARTICLE 20 - CARLISLE NONZONING WETLAND BYLAW

To see if the Town will vote to amend the Wetlands Bylaw of the Town of Carlisle as follows:

1. Amend Section 1.5, Section 7.1, and Section 11.1 by striking “May 2008” as it appears throughout, and replacing same with “October 24, 2014”;
2. Amend Section 2.5 by adding the words “Certificate of Mailing” after “(return receipt requested), so that Section 2.5 read as follows:

Any person filing a Notice or a Request with the Commission shall give at the same time written notification thereof, by certified mail (return receipt requested), Certificate of Mailing, or hand delivery to the owner and all abutters at their mailing addresses shown on the most recent certified Abutters List.

3. Amend Section 11.1.1 by deleting the words “of four (4) or more months during which the average rainfall for each month is fifty (50) percent or less of the ten (10) year average for that same month” and substituting the following therefor: “during which the Massachusetts Drought Management Task Force declares a Drought Watch for Northeast Massachusetts” so that Section 11.1.1 reads as follows:

Pond (inland) shall be defined as any open body of fresh water, either naturally occurring or man-made, with a surface area observed or recorded within the last ten (10) years of at least ten thousand (10,000) square feet, and which is never without standing water due to natural causes, except during periods of extended drought. For purposes of this definition, extended drought shall mean any period during which the Massachusetts Drought Management Task Force declares a Drought Watch for Northeast Massachusetts. Basins or lagoons which are part of waste water treatment plans shall not be considered ponds, nor shall swimming pools or other impervious man-made retention basins.

or take any action related thereto.

(CONSERVATION COMMISSION)

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 5th day of May, 2015 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 5, 2015

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	two for a term of three years
Housing Authority	two 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	one for a term of three years

DEBT EXCLUSION QUESTION

M.G.L. c. 59, § 21C(k)

Question 1: Shall the Town of Carlisle be allowed to exempt from the provisions of proposition two and one-half, so-called, the amounts required to pay for the Town of Carlisle's apportioned share of a bond to be issued by the Concord-Carlisle Regional School District to purchase new school busses for the District?

YES____ NO____

Question 2: Shall the Town of Carlisle be allowed to exempt from the provisions of proposition two and one-half, so-called, the amounts required to pay for the bond to be issued to fund the purchase of new pumper truck for the Fire Department?

YES____ NO____

NON-BINDING BALLOT QUESTION

BOW HUNTING ON TOWN-OWNED LANDS

Question 3: Shall the Town of Carlisle request the Selectmen to place an article on the next Town Meeting warrant to regulate bow hunting on Town-owned lands as an approach to deer management?

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 24th day of March in the Year of Our Lord 2015.

BOARD OF SELECTMEN

John Gorecki, Chairman

Douglas A.G. Stevenson

Peter Scavongelli

Vanessa Hunnibell Moroney

Nathan C. Brown

A True Copy Attest:

_____, Constable

Middlesex, ss.

PURSUANT TO THE WITHIN WARRANT, I have notified and warned the inhabitants of the Town of Carlisle by posting up attested copies of the same at the United States Post Office and on the Town Bulletin Board in said town at least seven (7) days before the date of the meeting, as within directed.

Constable of Carlisle

Date Posted: _____

Description of
Town of Carlisle Community Preservation Committee
Grant Agreement
with the
Town of Carlisle Affordable Housing Trust

GRANT AGREEMENT #: 2015-1

RECIPIENT: Town of Carlisle Affordable Housing Trust

PROJECT NAME: Community Housing Development Fund

GRANT AMOUNT: \$50,000, from the Community Housing Reserve Fund

GRANT TERM: 3 years, commencing July 1, 2015

PROJECT DESCRIPTION: To provide community education and to support planning efforts related to a proactive response to Chapter 40B, to support the development of Community Housing by identifying, analyzing, and possibly securing options to purchase property or properties, yet to be determined, for possible future acquisition by the Town of Carlisle, including but not limited to legal, environmental and due diligence costs, and by providing support to developers of Community Housing projects deemed to be consistent with local needs.

PROJECT LOCATION: Town of Carlisle

CONDITIONS: Funds appropriated pursuant to this grant shall not be expended on any of the following properties: the Banta-Davis Land, Benfield Parcel A, 338 Bedford Road, and the Conant Land.

Description of
Town of Carlisle Community Preservation Committee
Grant Agreement
with
Concord Carlisle at Play, Inc.

GRANT AGREEMENT #: 2015-2

RECIPIENT: Concord Carlisle at Play, Inc.

PROJECT NAME: Recreational Facilities at Concord-Carlisle Regional High School
("CCHS")

GRANT AMOUNT: \$400,000, to be disbursed in two phases: \$350,000 available for Phase 2 and \$50,000 available for Phase 3, the first \$100,000 of the Grant from the Open Space Reserve Fund and the remaining \$300,000 of the Grant from the Undesignated Reserve Fund. Funds to be disbursed upon provision by the Recipient of third party invoices for work completed on the Project.

GRANT TERM: 3 years, commencing July 1, 2015

PROJECT DESCRIPTION: Phases 2 and 3 of a three-phase project to renovate and rehabilitate the recreational facilities at CCHS:

Phase 2 – Renovation of the JV Softball and JV Baseball diamonds including backstops and fencing, construction of a new synthetic turf field (not including the purchase of the turf itself) including lighting and scoreboard, and construction of related walkways, access drives, and accessible pathways.

Phase 3 – Construction of an amphitheater, a new 310'x270' grass playing field, a backboard for lacrosse and soccer, and related accessible pathways.

PROJECT LOCATION: Concord-Carlisle Regional High School, Concord, MA

CONDITIONS OF GRANT: Funds appropriated pursuant to this grant shall not be expended until the Applicant submits to the CPC a signed use agreement among the Towns of Concord and Carlisle and the Concord-Carlisle Regional School District allowing the communities access to and use of the playing fields, tennis courts and other outdoor recreational facilities on the CCHS campus (excluding the existing upper turf fields) when not in use by the school.

Description of
Town of Carlisle Community Preservation Committee
Grant Agreement
with the
Gleason Public Library Board of Trustees

GRANT AGREEMENT #: 2015-3

RECIPIENT: Gleason Public Library Board of Trustees

PROJECT NAME: Preservation & Conservation of Gleason Public Library Civil War Collection

GRANT AMOUNT: \$52,000 from the Historic Reserve Fund, to be disbursed upon provision by the Recipient of third party invoices for work completed on the Project

GRANT TERM: 2 years, commencing upon execution of Grant Agreement

PROJECT DESCRIPTION: Stabilize and secure approximately 100 objects salvaged from the battlefields of Gettysburg, PA, and conserve 44 of the most noteworthy of these; acquire appropriate storage cabinets and supplies for the collection (with room for storage of other items from the collections of the library and/or Carlisle Historical Society), transport collection to secure storage facility and fund first year of storage fees; and acquire software and fund photographer to document the collection and to develop a professional inventory and searchable database and fund first year of software support and hosting.

PROJECT LOCATION: Gleason Public Library, 22 Bedford Road, Carlisle, MA and Carlisle Historical Society, Heald House, 698 Concord Street, Carlisle MA

Description of
Town of Carlisle Community Preservation Committee
Grant Agreement
with the
Town of Carlisle Town Clerk

GRANT AGREEMENT #: 2015-4

RECIPIENT: Town of Carlisle Town Clerk

PROJECT NAME: Historical Records Preservation

GRANT AMOUNT: \$6,000 from the Historic Reserve Fund, to be disbursed upon provision by the Recipient of third party invoices for work completed on the Project

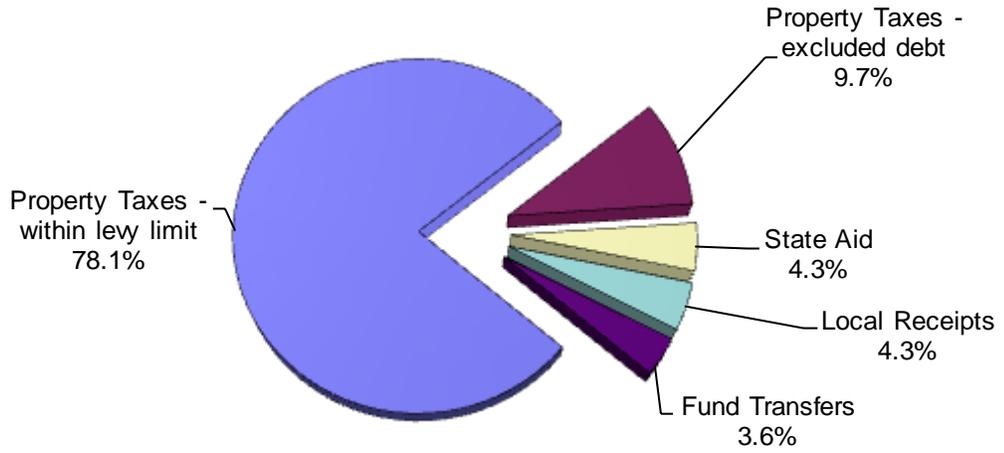
GRANT TERM: 1 year, commencing July 1, 2015

PROJECT DESCRIPTION: Restoration, preservation, and rebinding of three volumes of Town records dating from 1754-1803, scanning of each page, and storing of scans on CD

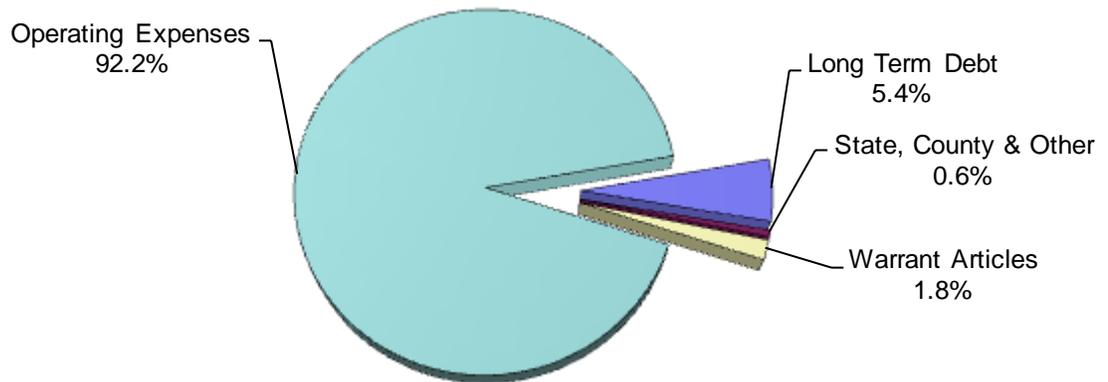
PROJECT LOCATION: Carlisle Town Hall, 66 Westford Street, Carlisle, MA

REVENUES & EXPENDITURES

Sources of Revenue
FY'16 Balanced Budget



Expenditures by Category
FY'16 Balanced Budget



Long Term Debt Service
FY'16 thru FY'30
(Does Not Include CCRSD)

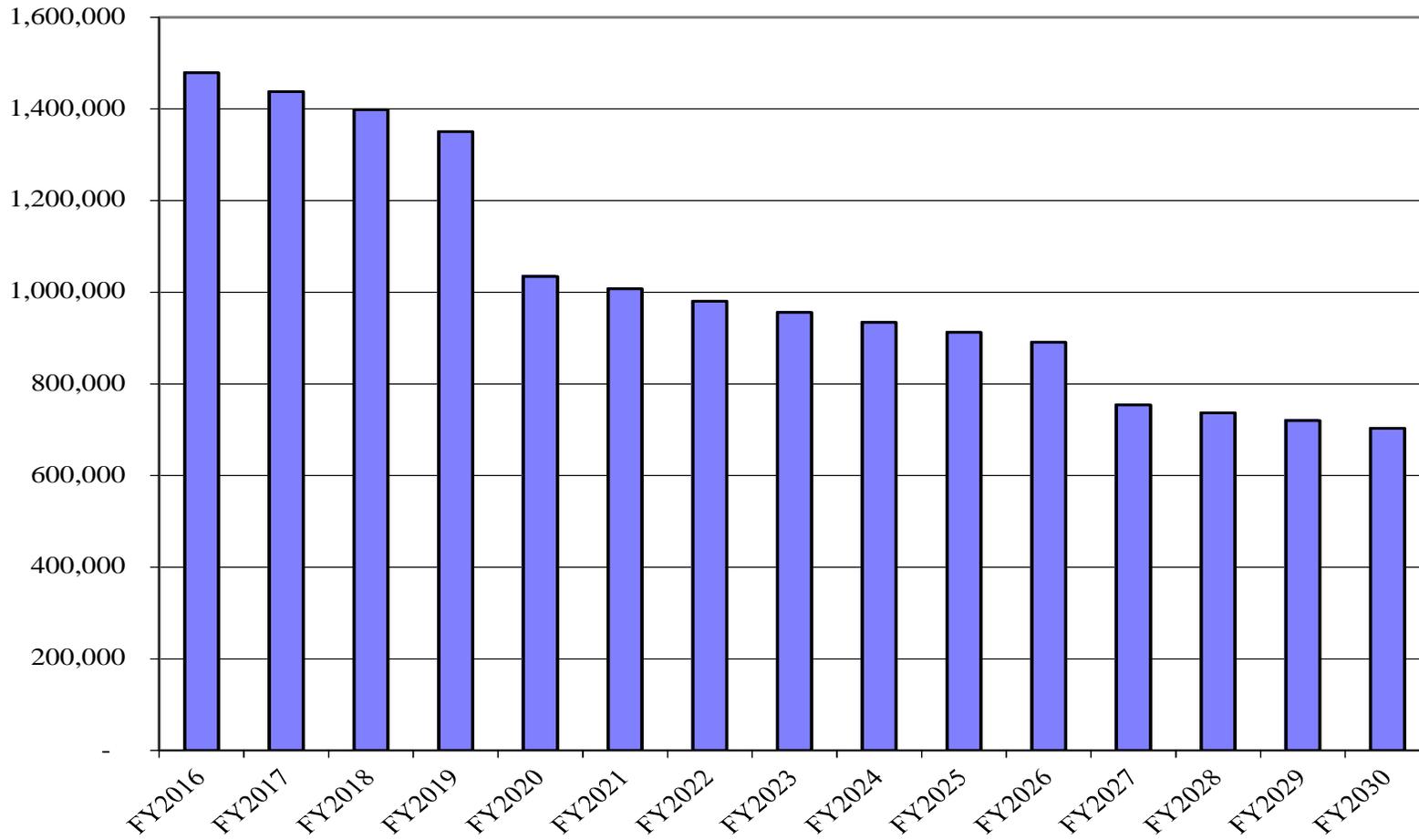


TABLE II - LONG TERM DEBT SERVICE & EXCLUDED DEBT LEVY

<u>LONG TERM DEBT SERVICE</u>		<u>FY'15 Budget</u>	<u>FY'16 Budget</u>	<u>% Change</u>
4/1/06	Wastewater Treatment	89,325	86,925	
4/1/06	Wastewater Treatment	81,881	79,681	
3/18/10	R/I - Building Construction	13,590	13,320	
3/18/10	R/I - Land Acquisition	127,743	122,200	
3/18/10	R/I - Building Addition	89,955	86,155	
3/18/10	School Boiler	35,263	34,565	
3/18/10	Fire Truck	57,843	56,695	
3/18/10	Cisterns	25,908	25,390	
11/18/12	CPS Building Project - FSA	15,950	15,650	
11/18/12	DPW Roll-off Truck	14,250	13,950	
11/18/12	Cisterns	5,620	5,500	
11/18/12	Fire Truck	35,920	35,200	
11/18/12	CPS Building Project - D&C	908,263	892,663	
11/18/12	DPW Dump/Sander	10,985	10,775	
Total Long Term Debt Service - Carlisle		<u>1,512,496</u>	<u>1,478,669</u>	<u>-2.24%</u>
Net CCRSD Debt Levy (Carlisle's Assessment)		<u>684,033</u>	<u>1,235,485</u>	<u>80.62%</u>
Gross Debt Service		<u>2,196,529</u>	<u>2,714,154</u>	<u>23.57%</u>
<u>EXCLUDED DEBT LEVY</u>		<u>FY'15 Budget</u>	<u>FY'16 Budget</u>	<u>% Change</u>
Long term debt - Carlisle		1,512,496	1,478,669	
Free cash used to reduce excluded debt levy		(100,000)	(440,000)	
CCRSD Long term debt		684,033	1,235,485	
Short Term Interest & short term debt		4,388	57,200	
Wang Coombs Stabilization Transfer		(14,945)	(14,945)	
Amortization of Premiums & Grants Paid by CPA contribution		-	-	
Net Excluded Debt Levy		<u>2,043,954</u>	<u>2,276,171</u>	<u>11.36%</u>

**Long Term Capital Requirements Committee
FY'16 Recommended Appropriations
and
Four Year Capital Summary Plan**

<u>Project/Program</u>		<u>Recommended FY'16 Appropriations</u>	<u>Four Year Capital Summary Projection</u>			
			<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>
Carlisle Schools	Technology Replacement - Desktop/Laptop	80,000	80,000	80,000	80,000	80,000
Carlisle Schools	Annual Maintenance (misc projects)	25,000	25,000	25,000	25,000	25,000
Carlisle Schools	Wilkins Building A/C	-	300,000			
Carlisle Schools	Auditorium Seat Refurb (phase 3 of 3)	20,000				
Carlisle Schools	Stage Curtain Refurb (phase 2 of 2)		15,000			
Carlisle Schools	Corey Elevator		75,000			
Carlisle Schools	Exercise Room Flooring		29,000			
Carlisle Schools	Tractor replacement			20,000		
Carlisle Schools	Security Cameras		19,000			
Carlisle Schools	Corey Bldg. - Replace girls lockers				27,000	
Police	Cruiser Replacements	82,000	40,000	40,000	40,000	40,000
Police	Computer Replacement	4,000	4,000	4,000	4,000	4,000
Police	Flooring		12,962			
Police	Re-roofing	24,630				
Police	Outdoor Handicap elevator		50,000			

		Recommended FY'16 Appropriations	<u>Four Year Capital Summary Projection</u>			
<u>Project/Program</u>			<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>
Police	Dispatch Console		125,000			
Fire	Computer Replacement	2,500	2,500			
Fire	Misc Building Projects / Station Maint.	5,000	5,000	5,000		
Fire	Hose Replacement		50,000			
Fire	Rescue Boat		21,000			-
Fire	Snowmobile & ATV w/trailer				45,000	
Fire	Ambulance				225,000	
Fire	Training Room Furniture			6,000		
Fire	Door and Window Replacement			12,000		
Fire	Interior Paint & Carpet				20,000	
Fire	Firefighter Gear Boxes				15,000	
Fire	Replacement of Tanker (Engine 5)	650,000				
Fire	Cisterns			150,000		
Fire	Car #1 Replacement			40,000		
Fire	Car #2 Replacement	38,000				
Fire	Car #3 Replacement		38,000			
Fire	Communications equipment			7,500		
Fire	Pager Replacements				15,000	
Fire	Fuel Tank replacement		12,000			
Fire	Replace A/C unit		15,000			
Fire	LDH Appliance replacement					15,000
Fire	Apparatus Bay Heating Units					10,000

		Recommended FY'16 Appropriations	<u>Four Year Capital Summary Projection</u>			
<u>Project/Program</u>			<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>
Fire	Telephone system replacement		12,000			
Library	HVAC Repairs	60,000				
Library	Misc Maint. Projects - Repairs and Service	5,000	5,000	5,000	5,000	5,000
Library	Technology Upgrades	4,000				
			4,000	4,000	4,000	4,000
Library	Replace carpeting		75,000			
Library	Interior Painting		20,000			
Library	Parking Lot Repaving			8,000	100,000	
Town Hall	Technology Upgrades	5,000	5,000	5,000	10,000	10,000
Town Hall	Major Repair/Replacement Account	10,000	10,000	10,000	15,000	15,000
Town Hall	Window Replacement				90,000	90,000
Town Hall	VOIP Telephone System				50,000	50,000
Town Hall	Energy/Lighting Upgrades				2,500	
Town Hall	Records Management / Archival Storage			25,000		
Town Hall	HVAC/Air Handler/Condenser		15,000			
Town Hall	Rear Vestibule		53,000			
Town Hall	Weatherproofing of Windows and Doors		5,500			
Town Hall	Attic Fans & Ventilation		15,000			
Town Hall	Replace Entry Doors			45,000		
Town Hall	New Roof					145,000
Town Hall	Carpet & Painting				45,000	

<u>Project/Program</u>		<u>Recommended FY'16 Appropriations</u>	<u>Four Year Capital Summary Projection</u>			
			<u>FY17</u>	<u>FY18</u>	<u>FY19</u>	<u>FY20</u>
Town Hall	Furnishing				20,000	
Town Hall	Remodel Bathrooms & Kitchens					40,000
Town Hall	Site Improvements - Landscaping & Paving			75,000	35,000	
DPW	Snow Plow Equipment	20,000				
DPW	Generator		35,000			
Recreation	Tennis Court Renovations	16,000				
Totals		1,051,130	1,172,962	566,500	872,500	533,000

**Long Term Capital Requirements Committee
FY'16 Recommended Appropriations
Funding Sources**

Total FY'16 Recommended Capital Appropriations	1,051,130
Funded from Free Cash	300,000
Fire Truck Subject to Debt Exclusion Vote (article 18)	650,000
Funded from the tax levy	101,130
Total recommended FY'16 funding sources	1,051,130

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

Carlisle Town Meeting

Introduction and Procedures

Prepared by
Wayne Davis, Town Moderator

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, acting as the legislative branch of our local Town government. Almost uniquely in modern American public life, Town Meeting embodies direct – not representative – democracy.

I. PURPOSE OF THIS DOCUMENT

This document explains how Town Meeting works in Carlisle, including an overview of the process of how matters get brought before Town Meeting, what happens at Town Meeting, and the basic procedural rules that apply during the meeting. This is a summary document, however, and no substitute for the actual rules, which are widely dispersed through a number of sources (described in Section IV.E.1 below).

Please note that, beginning with the Annual Town Meeting in 2014, the Moderator will no longer summarize the procedural rules at the outset of the meeting. Citizens may therefore wish to review this summary before attending.

II. INTRODUCTION: TOWN MEETING BASICS

A. What Is Town Meeting and Why Is It Important?

Town Meeting is the legislative body for the Town of Carlisle. Its most fundamental responsibilities include the following:

- Deciding what elected officers the Town shall have (although not the individuals who actually fill the offices; they are elected at a town-wide election), what salary it will pay these officers, and their terms of office;
- Deciding for what purposes the Town will spend money, how much may be spent for each purpose; and where the money will come from (*i.e.*, current tax receipts, borrowing, or other sources);
- Adopting and amending laws (referred to as “bylaws”) that regulate matters such as:
 - The structure and operation of Town government
 - The organization and procedures for administration of Town business
 - The conduct of citizens
 - The use of land

- How and where certain occupations may be conducted.

A variety of other matters may be taken up by Town Meeting, as authorized by state law. Town Meeting votes typically authorize various actions to take place, while the Board of Selectmen (or others from the executive branch) actually take these actions. In this way, the Town Meeting provides a check on executive power.

Most matters that come before Town Meeting are settled by the Town Meeting vote. Therefore, voters who do not attend the meeting must abide by the decision of those who do. In certain limited instances (for example, the decision to authorize issuance of a bond to borrow money), an affirmative Town Meeting vote must be confirmed by voters at a town-wide Election, typically held a week or two later.

B. Who is Eligible to Participate?

Any voter registered in the Town of Carlisle may attend and speak. Non-voters may attend and observe, but may only speak with the consent of Town Meeting.

C. Where and When Are Our Meetings Held?

Carlisle holds its Annual Town Meeting in the spring, typically late April or early May. The meeting ordinarily begins on Monday at 7 pm, continuing on Tuesday evening if necessary. The meetings are held in the Corey Auditorium at Carlisle Public Schools. The Annual Town Meeting considers and adopts the Town Budget, as well as other matters that arise during the course of the year and can await the annual gathering. A Special Town Meeting may be called at other times of the year (though typically in the autumn) if matters arise that require a Town Meeting vote and cannot wait until the next annual meeting.

III. THE TOWN MEETING AGENDA

A. What Is the Warrant?

The agenda for a Town Meeting is called the “warrant.” The warrant is a legal document issued by the Board of Selectmen, at least seven days before an Annual Town Meeting and at least 14 days before a Special Meeting. The warrant notifies the voters of (1) the time and place of the meeting and (2) the subjects to be acted upon at the meeting. No action subsequently taken at a Town Meeting is valid unless the subject matter was contained in the warrant. While a precise description of the vote to be taken is not required, the warrant must contain a sufficient description of what is proposed so as to constitute an adequate notice to voters of the matter to be considered.

B. How Do Items Get Included in the Warrant?

Each specific item to be considered at Town Meeting is identified in the warrant as an “article.” The Selectmen determine which articles to include in the warrant. As a formal matter, the Selectmen include articles either upon their own motion or upon petition submitted to them prior to the close of the warrant by ten or more registered voters (for annual meetings; 100 or more registered voters for Specials). In practice, the articles are initiated not just by the Selectmen, but also by the various other town boards or committees. In almost all cases, before proposing a warrant article, the proposing board

or committee will have devoted several public meetings to debate the proposal, gather public input, and refine the idea. The Selectmen typically begin formulating the warrant in January and close it in March, a month or more before the Annual Town Meeting. (At a minimum, the warrant must be closed at least seven days before Annual Town Meeting, and fourteen days before a special.

In some towns (such as our neighbor Concord), there is a strong tradition of citizen petitions. By contrast, in Carlisle the Selectmen and other town bodies have generally encouraged citizens to bring their ideas for possible warrant articles to them well in advance of the Annual Town Meeting (ideally, by November or December), so that if the idea has merit, it can be developed and refined through the usual public channels. This has the advantages of encouraging town government to be responsive to citizens and increasing the probability that the idea comes to the floor of Town Meeting “fully baked” and with support from one or more boards or committees. On the other hand, the petitioners may want to take their idea directly to the floor of Town Meeting by submitting a citizens petition. Either approach is permissible.

If you wish to submit a citizen petition directly, the Town Clerk can help you with the filing procedures. (See Contact Information below.) The Town Moderator is also available to advise on the form and language of a possible warrant article and its accompanying motion (see Section IV.E.2 below) though not on the underlying policy proposal or on the politics of adoption. *Town Meeting Time* (referenced in Section IV.E.1 below) also provides helpful guidance on citizen petitions.

IV. PROCEDURES AT TOWN MEETING

A. How Do I Gain Admission to Town Meeting?

You must be a registered voter in Carlisle in order to participate. If you are not yet registered, see the Town Clerk at Town Hall. If you are not registered, you may still attend, but will not be able to vote, or to speak without consent of the meeting. Meetings typically start at 7 pm. Please arrive at least ten minutes in advance so you can be checked in.

B. Can I bring my kids?

Yes, of course. If they can be reasonably quiet and well behaved, they may sit with you in the main auditorium. We particularly welcome middle and high school students who may be interested in witnessing democratic government in action. For those with smaller children, the Town typically sets up the school cafeteria with an audio and video feed and microphone, so that you can participate fully while your kids play in the corner. The Moderator appoints an Assistant Moderator to oversee this room.

C. What If I Need A Special Accommodation To Be Able To Participate?

Carlisle welcomes the participation of all citizens at Town Meeting. We will do our best to help. If possible, please contact the Town Clerk in advance to discuss any special needs. Early notice in advance of the meeting increases the likelihood of satisfactory accommodations.

D. How Many for a Quorum?

Carlisle's Town Meeting Bylaw specifies a quorum of 150 to open and conduct a Town Meeting. Back in the day (or so it is said), the local constabulary would be enlisted to gather citizens if Town Meeting was a few short of a quorum. Cell phones have made last-minute recruiting easier, but it's still best if folks show up on time! The sooner we start, the sooner we finish.

E. How is Business Conducted?

i. Authority for Rules

The meeting operates first under the Massachusetts General Laws, and then in accordance with Carlisle's Town Meeting Bylaw. In situations not covered by these authorities, guidance has been provided for years by local tradition and by *Town Meeting Time*, the handbook of parliamentary procedure published by the Massachusetts Moderators Association (MMA). It is available in Gleason Public Library or can be mail-ordered from the MMA. Robert's *Rules of Order* is not used, for reasons explained in *Town Meeting Time* (see page 11 in the 3rd Edition).

These authorities don't cover every possible situation, and the Moderator has broad discretion to exercise his judgment about how best to proceed. However, the Moderator, being human, is not infallible. To question or challenge any procedural ruling of the Moderator, see Sub-section ix below on Points of Order.

ii. Getting Started – Turning Articles into Motions

The Moderator presides at Town Meeting, keeps order, and makes a public declaration of all votes. He presents the articles in the order in which they appear on the Warrant, unless a procedural vote is taken to consider one or more articles out of the published order. The Moderator will either read the article in full, or summarize its substance. He or she will then call for a motion, which is customarily made by the sponsor of the article. The motion will be a more precise statement of the action to be taken by Town Meeting. Recall that the article is intended to provide a notice of the topic to be considered; the motion must be specific. The motions are prepared in advance and compiled by the Town Administrator in a handout which is given to each voter as he or she enters the meeting. The person making the motion may read the motion in full if it is short; otherwise, he or she may simply "move the adoption of Article XX as printed in the handout." Citizens who have proposed an article through the petition process should contact the Moderator at least one month in advance of Town Meeting to discuss the process for submitting an appropriate motion.

iii. The Opening of Debate

Following the motion and second, the Moderator invites the proponents to make a presentation. Following the presentation, the Moderator asks the Board of Selectmen, the Finance Committee, and any other town boards, commissions and committees if they have voted to make a recommendation on the motion. Following summary reports of these votes, the Moderator invites the Town bodies to explain their votes, if they wish. Thereafter, the Moderator opens the floor for debate.

iv. Floor Debate – General Procedures

At this point, the Moderator will typically open the floor for debate. (There are a couple exceptions, explained in the next subsection.) Microphones are located in the aisles and at the back of the auditorium. If you can, please move to the microphone in advance of requesting to speak. If participating from the cafeteria, let the assistant moderator know that you wish to speak. When the Moderator recognizes you, please state your name and address. The meeting is taped, so each time you speak you must identify yourself and your street address.

You may speak more than once, although the Moderator generally will not recognize you to speak a second time on a given motion until others have had an opportunity to speak a first time.

Comments should be addressed to the Moderator, rather than to anyone else who has spoken. If, for example, you have a question seeking to clarify something that a prior speaker has said, you address the question to the Moderator, e.g., “Mr. Moderator, I would like to request that the Finance Committee Chairman elaborate further on his comment that the proposed expenditure will not affect the Town's bond rating.” The Moderator will then exercise discretion and decide whether to have the prior speaker respond.

Carlisle has a history of engaged, vigorous, and respectful debate. Well-reasoned and impassioned arguments on the issues are welcome; personal attacks are not.

v. Floor Debate – A Few Exceptions

The Moderator occasionally varies the procedures from those explained in the preceding section.

If on a particular article, a group or groups have organized themselves in opposition to the proposal and have made a request in advance, the Moderator will recognize them to speak first following the proponents.

If the Moderator judges that a particular motion may be so complex as to generate questions for further explanation, he may ask that questions be posed at the outset of debate. Such questions should be for genuine clarification of facts (*e.g.*, “What is the tax impact to the average Carlisle household?”) rather than arguments disguised in the form of questions (*e.g.*, “How can the proponents justify this brazen abridgment of our sacred property rights?”)

vi. Floor Debate Time Limits

Time limits will be firmly, but gently, enforced by the Moderator. They are:

- 8 minutes for the main presentation by Proponents.
- 6 minutes for presentations from town boards or committees other than those making the main motion, as well as from organized opposition that has notified the Moderator in advance;
- 3 minutes for comments from the floor.

In rare situations, in response to a request made in advance, the Moderator may exercise his discretion to allocate additional time to a speaker. This will generally be limited to circumstances where there is an unusually large amount of complex information that needs to be explained from the floor.

vii. Use of Audio-Visual Aids

The Proponents of an article and any organized opposition may use slides, video or other aids to their presentation; others may only do so at the discretion of the Moderator. The Moderator has published *Town Meeting Presentation Guidelines* on the Town's website (homepage www.carlislema.gov or click here).

vii. Amendments

Amendments are generally permissible, though there are certain limitations, as explained below. If the amendment is very simple (e.g., "I move to amend by changing the amount of the appropriation from \$100,000 to \$80,000"), you may simply state the motion. If it is more complex, you should prepare the amendment in writing. When you are recognized by the Moderator to speak, make your motion and then offer the written amendment to the Town Clerk (who sits on stage, behind the Moderator).

One important limitation on amendments is that they cannot change the motion so radically that it renders the motion "outside the scope" of the article. Recall that the purpose of the article is to give adequate notice to the voters of the matters to be considered at Town Meeting. Thus every motion – whether it is the main motion introduced at the beginning of debate, or a motion as subsequently amended, must be broadly consistent with the issue as described in the Warrant. For example, if the Article proposed the purchase of a new fire truck for the Fire Department, it would not be "within scope" to amend the motion to purchase two fire trucks or a rescue boat.

Also, note that special, more restrictive rules pertain to amendments to motions related to zoning by-laws and to Community Preservation Act funding appropriations. If you're contemplating such amendments, it's best to confer with the Moderator in advance of Town Meeting.

ix. Procedural Motions

Various procedural motions may be made during the course of debate. These motions are explained in detail in *Town Meeting Time*. A few key ones are highlighted below.

- **Point of Order.** When the Moderator makes a mistake, or there is otherwise something you believe is wrong with the procedure being followed, you may rise to a Point of Order. You may do so by calling out "Point of Order!" from your seat, at which time you will be recognized by the Moderator. You may also use a Point of Order to simply ask a procedural question of the Moderator. (Don't be shy; if there's something about the procedures you don't understand, there are probably others in the same boat.)
- **Ending Debate - "Call the Question."** A voter may move to end debate by making a motion to "Call the Question." If accepted by the Moderator, the motion is put to an immediate vote, without debate, and requires a two-thirds majority for

passage. However, the Moderator will exercise his discretion in determining whether to accept the motion. If, in the Moderator's judgment, the arguments have gotten repetitive and are generating little fresh insight, the motion will be accepted and put to a vote. Conversely, if voters still wish to speak and there are new arguments to be made, the motion will not be accepted. Put simply, the Moderator allows the motion as a time-management tool and disallows it as a tactic to stifle an ongoing and incomplete debate.

- **Reconsideration.** At any time prior to the close of the meeting, any voter may move to reconsider a motion that was previously voted upon. This motion has rarely been used in Carlisle in recent years. In general, the Moderator will not entertain a motion to reconsider unless, in the best judgment of the Moderator, a significant error or omission occurred in the language or the process of the original action on the article, or a significant change of circumstances has occurred, such that there is a clear likelihood that the outcome could change upon reconsideration or that reconsideration would be in the Town's best interest.

Such errors, omissions or changes of circumstances should be brought to the Moderator's attention as soon as they are known, and the Moderator will determine if and when the Motion for Reconsideration will be taken up. If the Moderator determines that the Motion may be taken up, a majority vote is necessary to proceed with reconsideration.

Other Procedural Questions.

Voters may raise procedural questions during Town Meeting. While it is of course helpful when everyone understands the basic rules, voters are not expected to be expert parliamentarians. Therefore, if there is some important step you would like to take, but are unsure of the exact procedure, it is acceptable to state your purpose on the floor of Town Meeting and request the Moderator's guidance as to the appropriate procedure. If the purpose is germane and the timing appropriate, the Moderator will suggest the proper procedure. If such situations can be anticipated, it is best to request the Moderator's advice in advance of Town Meeting. (See Contact Information below).

x. Voting

The Moderator generally calls for a voice vote on any articles that require a majority for passage. If the Moderator is in doubt as to the outcome, he will call for a show of hands or ask for a counted vote with the assistance of the tellers.

When a two-thirds vote is required on a motion that appears to have little opposition, the Moderator will typically call for a show of hands. However, if the vote appears controversial or if the Moderator has any doubts about whether two-thirds has been reached by show of hands, he will then call for a counted vote with the assistance of the tellers.

At the conclusion of voting by any method, the Moderator will declare the outcome. Any seven (7) voters may challenge the Moderator's call of the vote and demand a formal count (or re-count). Such a challenge must be made immediately after the Moderator declares the outcome. The challenger should immediately call out, "I question the vote!"

and then the Moderator will ask whether six additional voters also wish to challenge the declared outcome.

F. What is the Consent Agenda and How Does It Work?

As explained in more detail in the Warrant Book, the Board of Selectmen typically group together a set of articles which, in the collective judgment of the Selectmen, Finance Committee, and the Moderator, are unlikely to generate controversy and can be properly voted without debate. The purpose of the Consent Agenda is to streamline Town Meeting by allowing for speedy passage of articles that require no debate.

The Warrant Book lists the articles proposed for inclusion in the Consent Agenda. If you object to any article being so included (either because you would like to see it debated, or simply voted upon separately), you may contact the Moderator in advance to register your objection. Alternatively, at the call of the Consent Agenda at Town Meeting, the Moderator will call out the Articles, one by one. Any voters who object to that article's inclusion in the Consent Agenda may simply call out "HOLD" in a loud voice when the number is called. In either case, the Article will be removed automatically from the Consent Agenda, restored to its original place in the Warrant, to be debated and voted in the usual manner.

G. How Do We Debate and Vote On the Town Operating Budget?

Among Town Meeting's most important responsibilities is the adoption of the Operating Budget. The Operating Budget is both large and complex. For fiscal year 2013-14, the Operating Budget totaled nearly \$25 million; as presented in the Warrant Book, the Article spanned nearly eight pages, presenting detail on twelve large budget categories and 34 sub-categories. The Operating Budget represents the culmination of many months of effort, meetings and hearings by multiple town officers, committees, and boards. The best time to influence the budget is while it is still being formulated early in the calendar year. Citizens interested in particular budget items are strongly encouraged to attend the public meetings of the relevant board or committee requesting the budget authority, as well as meetings of the Finance Committee and Board of Selectmen when that particular budget line item is considered.

At Town Meeting, the vote is taken on the Operating Budget as a whole. However, to organize the discussion more efficiently, the Moderator will first ask voters to identify any of the line items about which they have any questions or that they wish to debate. The line items will then be taken up for discussion in the order in which they appear in the budget. Otherwise, the usual procedural rules apply. Voters may, for example, move to amend the budget. If the amendment is to increase funding for a particular line item, the amendment must specify the source of the additional funds. Voters may also request to hold a separate vote on a particular category, sub-category, or line item by making a motion to "divide the question."

V. CONTACT INFORMATION

For questions about this document and procedures to be followed at Town Meeting, you may contact the Town Moderator, Wayne Davis, by telephone at (978) 369-2278 or by email to Moderator@carlisle.mec.edu.

For questions about registering to vote or about the procedures for filing a citizen petition, you may contact the Town Clerk, Charlene Hinton, at her office in Town Hall; by telephone at (978) 369-6155 or by email to chinton@carlisle.mec.edu.

VI. FURTHER INFORMATION ON TOWN MEETING

The most complete source of information about town meetings in Massachusetts is ***Town Meeting Time: A Handbook of Parliamentary Law***, published by the Massachusetts Moderator's Association (3rd Edition, 2001). Copies of ***Town Meeting Time*** are available in Gleason Public Library or may be purchased directly from the Moderators Association at <http://www.massmoderators.org/tmt.html>.

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.

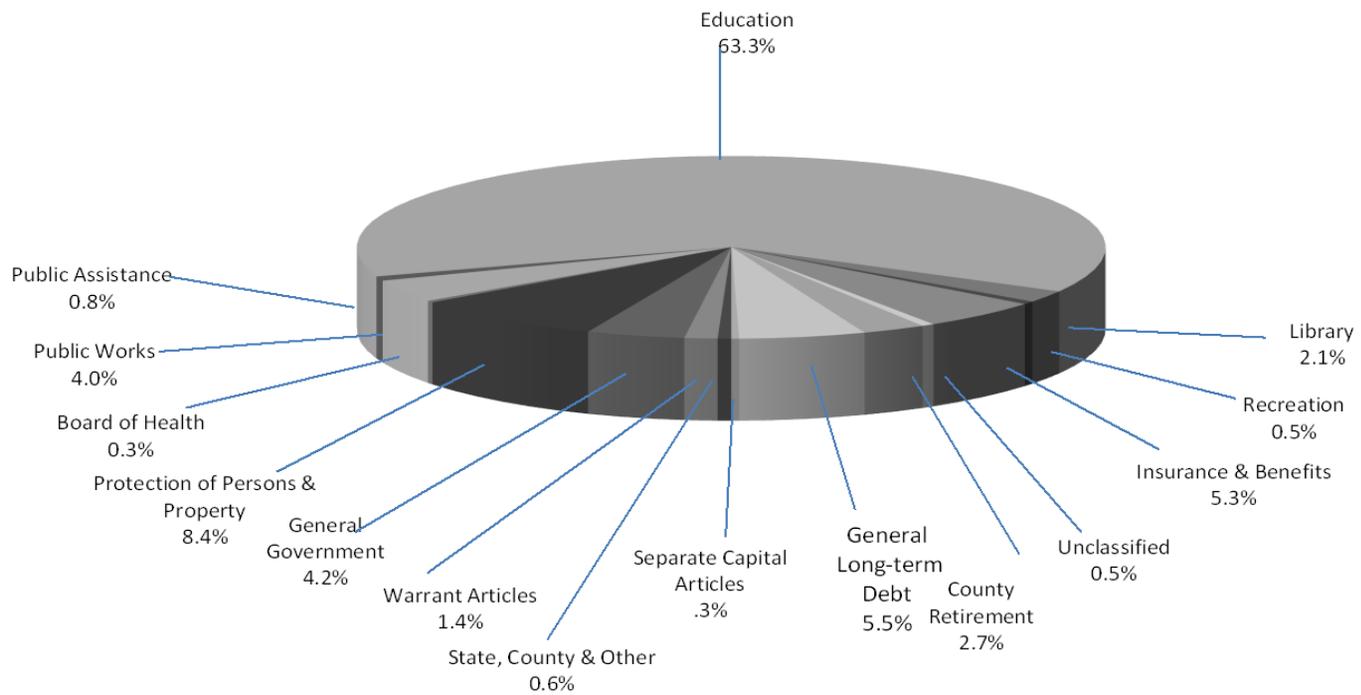
Revolving Fund: A Revolving Fund allows the town to receive revenues for a specific service, which can then used for that specific purpose without appropriation. Revolving Funds must be reauthorized by town meeting each year and a limit on the total amount that can be spent from each fund is established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

NOTES

Town of Carlisle Summary of Expenditures FY'16 Balanced Budget



**BOARD OF SELECTMEN
66 WESTFORD ST.
CARLISLE, MA 01741**

NONPROFIT
AUTO
U. S. POSTAGE
PAID
CARLISLE, MA
PERMIT NO. 1

***POSTAL PATRON
CARLISLE, MA 01741***