

**Wayland Board of Assessors  
Town Building- Assessor's Office  
41 Cochituate Rd Wayland MA 01778  
Monday, August 28, 2017**

Attendees: Vice Chair- J. Brodie, Z. Ventress, S. Glovsky, Director of Assessing E. Brideau, Assistant Assessor D. Clarke and Administrative Assessor J. Marchant

Public in attendance: George Uveges- Finance Committee

**Meeting called to order**

J. Brodie called the meeting to order at 7:20pm.

**Review of minutes from July 17, 2017**

**Z. Ventress moved to approve the minutes of July 17<sup>th</sup> as submitted. S. Glovsky seconded. All in favor** Director Brideau stated the June executive session minutes will be reviewed and voted on at the next meeting when the Chair is present.

**Appellate Tax Board – update and review of scheduled motion hearing**

Director Brideau handed out a spreadsheet showing the current docketed cases. She also stated the case with the Wayland Rod and Gun Club was decided in the Town's favor. The Gun Club has requested Findings of Fact which can take several months to a year to receive.

**FY17 Supplemental Abatement**

Director Brideau recommended the board deny the supplemental abatement request. The board signed their denial of the abatement by signature.

**Special Town Meeting**

**Review and BOA potential vote on Warrant Article regarding the Circuit Breaker Filing Deadline**

Director Brideau explained the Circuit Breaker application filing deadlines do not line up with other exemption filing deadlines. She explained the Town currently holds fiscal year accounting books open to the end of the calendar year because of these exemptions. Also, the tax relief is not going straight against the tax bill- the applicants are receiving checks. KP Law has reviewed the proposal to change the deadline.

The board members gave some feedback and clarified some points for the new process.

**Z. Ventress moved to support the warrant article to adjust the Circuit Breaker match application deadline to coincide with the other exemption deadlines. S. Glovsky seconded. All in favor**

**Documents for BOA Signature (review):**

**Circuit Breaker Applications**

Director Brideau recommended two circuit breaker applications for approval that have been reviewed and meet the criteria. **J. Brodie moved to accept the Director's recommendation to approve the two Circuit Breaker applications that have been reviewed and meet the criteria. S. Glovsky seconded.** The board signed their approval.

*Items in bold include agenda items as posted, motions and votes.*

**Director Update:**

**-FY18 Interim Assessment Timeline**

Director Brideau reviewed the timeline with the board members.

**-FY19 Budget**

Director Brideau reviewed the FY 18 and proposed FY19 budgets with the board members.

Z. Ventress left the meeting at this time.

**Lacking a quorum – no further action was taken by the Board and the meeting concluded.**

**-Annual Town Report**

Director Brideau distributed a copy of her draft Town Report.

**Next Meeting:**

September 18<sup>th</sup>

**Meeting Adjourned**

**Lacking a quorum, the meeting ended at 8:06pm without a motion or vote to adjourn.**

Respectfully submitted,  
Jessica Marchant

Docket#	Fiscal Year	Hrg Sch	Appellant	Appl Name	Filing Date	Assessed \$
T320202	2013		AT&T Corp.	Richard L. Jones, Esq.	6/14/2013	120,300.00
T320262	2013		Teleport Communications Group, Inc.	Richard L. Jones, Esq.	6/14/2013	1,024,900.00
F320716	2013		West Beit Olam Cemetery Corporation	Sander A. Rikleen, Esq.	6/27/2013	472,100.00
T323767	2014		AT&T Corporation	Richard L. Jones, Esq.	6/13/2014	130,700.00
F328309	2015	10/5/2017	Herb Chambers 533 Boston Post Road LLC	John M. Lynch, Esq.	7/20/2015	3,338,500.00
F328310	2015	10/5/2017	Herb Chambers 83 Boston Post Road LLC	John M. Lynch, Esq.	7/20/2015	330,900.00
T323595	2015		Level 3 Communications, LLC	William A. Hazel, Esq.	6/12/2014	847,900.00
F325938	2015	10/12/2017	Rose et al, Joshua A.	Mark F. Murphy, Esq.	4/23/2015	\$593,200.00
T323713	2015		Teleport Communications Group, Inc.	Richard L. Jones, Esq.	6/13/2014	1,124,100.00
F328268	2015		West Beit Olam Cemetery Corporation	Sander A. Rikleen, Esq.	7/17/2015	656,300.00
F330091	2016	10/5/2017	Herb Chambers 533 Boston Post Rd LLC	John M. Lynch, Esq.	6/3/2016	\$3,381,300.00
F330090	2016	10/5/2017	Herb Chambers 83 Boston Post Rd LLC	John M. Lynch, Esq.	6/3/2016	\$330,900.00
F331360	2016	10/12/2017	Joshua A Rose T/E	Mark F. Murphy, Esq.	7/8/2016	\$613,100.00
F330328	2016		West Beit Olam Cemetery Corporation	Sander A. Rikleen, Esq.	6/13/2016	\$668,800.00
F332949	2017		Herb Chambers 83 Boston Post Rd LLC	John M. Lynch, Esq.	5/26/2017	\$330,900.00
X307778	2017		Jonathan Isenburg & Meeta Patel	Jonathan Isenburg & Meeta Patel	4/3/2017	\$1,308,200.00
F332828	2017		Joshua A Rose T/E	Mark F. Murphy, Esq.	5/18/2017	\$612,900.00
F332931	2017		Thomas V. Maglione	Thomas V. Maglione	5/24/2017	\$484,900.00
F332941	2017		West Beit Olam Cemetery Corporation	Sander A. Rikleen, Esq.	5/25/2017	\$649,300.00
12928	2017		Victoria P. Wells	Victoria P. Wells	7/25/2017	\$322,100.00

Outstanding ATB Cases as of June 12, 2017

Property Type	Fiscal Year	Docket Number	MAP	LOT #	STREET	ASSESSED VALUE	Notes:
Telecom	2013	F320202			0 Various - AT&T Corp.	139,700	
Telecom	2013	F320262			0 Various - Teleport Communications	939,000	
Telecom	2014	F323767			0 Various - AT&T Corp.	120,300	
Telecom	2014	F320262			0 Various - Teleport Communications	1,024,900	
Telecom	2015	F323767			0 Various - AT&T CORP	130,700	
Telecom	2015	F323713			0 Various - Teleport Communications	1,124,100	
Telecom	2015	F323595			0 Various - Level 3 Communications	847,900	
Real Estate	2015	F325938	43A	8	46 Cedar Crest Rd	593,200	Scheduled for 10/12: Residential dwelling - issue with Bedroom count - owner represented by Atty. Mark Murphy
Real Estate	2015	F328268	18	34	59 Old Sudbury Rd	656,300	SJC denied FAR - applicant will need to withdraw this case
Real Estate	2015	F328309	21	3	533 Boston Post Rd	3,338,500	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch
Real Estate	2015	F328310	21	4	533 Boston Post Rd	330,900	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch
Telecom	2016				MCI Communications	44,500	
Real Estate	2016	F330090	21	4	533 Boston Post Rd	330,900	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch
Real Estate	2016	F330091	21	3	533 Boston Post Rd	3,381,300	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch
Real Estate	2016	F330328	18	34	59 Old Sudbury Rd	668,800	SJC denied FAR - applicant will need to withdraw this case
Real Estate	2016	F331360	43A	8	46 Cedar Crest Rd	613,100	Scheduled for 10/12: Residential dwelling - issue with Bedroom count - owner represented by Atty. Mark Murphy

Outstanding ATB Cases as of June 12, 2017

Telecom  
Real Estate

2017 F330308		Level 3		805,600		
2017	X307778	39	30	42 Shaw Dr	1,308,200	
	F332931	49	57	29 Rice Rd	484,900	
	F332828	43A	8	46 Cedar Crest	612,900	Scheduled for 10/12: Residential dwelling - issue with Bedroom count - owner represented by Atty. Mark Murphy
	F332941	18	34	59 Old Sudbury Rd	649,300	SJC denied FAR - applicant will need to withdraw this case
	F332949	21	4	533 Boston Post Rd	330,900	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch
	F332949	21	3	533 Boston Post Rd	3,446,000	Scheduled for 10/5: Herb Chambers Auto Dealer - represented by Atty. Lynch

Petitions for  
Late Entry -  
2017

2017	PLE012928	047A	46	Crest Rd	29,700	Motion Hearing - 8/31
	PLE	047A	48	8 Crest Rd	322,100	Motion Hearing - 8/31

Exposure



THE COMMONWEALTH OF MASSACHUSETTS  
*Appellate Tax Board*  
100 Cambridge Street, Suite 200  
Boston, Massachusetts 02114

(617) 727-3100  
(617) 727-6234 (fax)

AUG 28 2017

RECEIVED  
2017 AUG 30 PM 1:52  
WAYLAND  
BOARD OF ASSESSORS

Thomas C. Grassia  
Wayland Rod & Gun Club, Inc.  
4 Meadow View Road  
Wayland, MA 01778

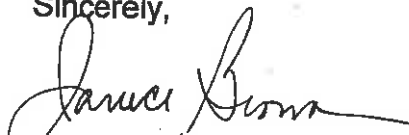
**FINDINGS OF FACT NOTICE**

Re: **Wayland Rod & Gun Club, Inc.**  
**v. Board of Assessors of the Town of Wayland**  
**Docket No. F330237**

Dear Sir,

Appellant's Request for Findings of Fact and Report filed on Monday, August 14, 2017, allowed.

Sincerely,

  
Clerk of the Board  
Asst.

Cc: Mark J. Lanza, Esq.  
Attorney at Law  
9 Damonmill Square, Suite 4A4  
Concord, MA 01742

Board of Assessors  
Town Hall  
41 Cochituate Road  
Wayland, MA 01778

/jb

**ARTICLE FOR SPECIAL TOWN MEETING  
NOVEMBER 2017**

SPONSOR: Board of Selectmen DATE RECEIVED: \_\_\_\_\_  
CONTACT PERSON: Ellen Brideau TELEPHONE/Day: 508-358-3658  
Director of Assessing TELEPHONE/Evening: \_\_\_\_\_  
BOARD VOTE: \_\_\_\_\_ DATE OF VOTE: 8-21-17  
TITLE: CHANGE FILING DEADLINE FOR CIRCUIT BREAKER MATCH  
PROGRAM

COST: \_\_\_\_\_ NO COST:  COST ESTIMATE: \_\_\_\_\_

TEXT: To determine whether the Town will vote to amend the Code of the Town of Wayland by modifying paragraph G in Section 19-8 of the Code of the Town of Wayland by deleting the crossed-out text and inserting the underlined text as follows:

G. Local Circuit Breaker Program. Applications for senior tax relief under the Town Circuit Breaker program must be filed with the office of the Board of Assessors no later than ~~December 31~~ April 1 of the year ~~in which the original tax filing was due~~ to which the tax relates, or within three months after the bill or notice of assessment was sent, whichever is later.

COMMENTS: This article changes the filing deadline for the local Circuit Breaker matching program, one of Wayland's tax relief programs for its senior residents, to coincide with all other exemption programs' filing deadlines and to align with the fiscal year. It does not change the program's eligibility or funding.

The Circuit Breaker income tax credit is for persons age 65 and older with low to moderate-income. Qualifying senior citizens may claim a credit on their State income tax returns for the real estate taxes paid on their Wayland residential property. In addition, the Town matches the Circuit Breaker Income Tax Credit with a like reduction in the local real estate tax. More information and instructions for filing can be found on the Assessors and the Council on Aging websites.

The current filing deadline of December 31 presents operational and administrative challenges for the financial operations of the Town. The December deadline requires the Town to leave open each Fiscal Year's budget more than six months into the next Fiscal Year because credits are for the prior fiscal year. In addition, because tax credits can only be

applied to the fiscal year in which the credit was received, applications received after the June 30 end of fiscal year receive a refund check instead of a tax credit. Refund checks generate additional work on behalf of the Tax Collectors office and the Accounting Office.

The Assessor's Office processes approximately 130 local Circuit Breaker applications annually with 80-90 applying prior to the 4<sup>th</sup> quarter real estate bill being due. The remaining applications are processed after the 4<sup>th</sup> quarter payment and require the disbursement of a paper check and should generate a 1099 tax form. The amount of the match has been \$1070 for several years.

Please see the chart below for a comparison of this change in deadline:

### Wayland Circuit Breaker Town Match

#### Current Process: FY 2017

#### Proposed Process: FY 2018

Calendar Year 2017: 1/1/17-12/31/17

Fiscal Year 2018: 7/1/17 - 6/30/18

Applicant uses MA 2016  
Income Tax Filing

Applicant to use MA 2016  
Income Tax Filing

Applicants began  
applying January 2017.

Applicants apply

Applications received  
prior to April 30, 2017  
received a credit to their  
tax bill.

July 1, 2017 to April 1, 2018  
and receive a credit to their  
tax bill.

Applications received  
after April 30, 2017 to  
December 31, 2017  
receive a paper check.\*  
MA Law does not allow  
credits received in one  
fiscal year to be applied  
to a future fiscal year.

All applications will be  
processed prior to 4<sup>th</sup>  
Quarter Tax Bills being due.  
No need for paper checks.

\*These checks should generate an IRS 1099 form annually.

The Board of Assessors, the Board of Selectmen and the Senior Tax Relief Committee voted to [support] this article. *To be updated if votes occur.*

**ARGUMENTS IN FAVOR:** Senior applicants for all other exemption programs are required to use their prior year federal tax returns to determine eligibility. Utilizing the same tax filing year for all programs will streamline the process and create uniformity.



Changing the application due date brings the Circuit Breaker application due date into alignment with all other Town run residential tax relief programs.

Changing the deadline will streamline the financial administration of the local Circuit Breaker program for the Finance Department, the Assessors, the Tax Collector and the Council on Aging.

**ARGUMENTS OPPOSED:** There may be confusion around changing the deadline which can be addressed with training workshops and written materials.

There are some residents who only qualify for the Circuit Breaker match every other year. Since the same tax return will be used for two years during the transition period, there may be some residents who do not qualify for the Circuit Breaker match two years in a row.

SIGNATURE OF CHAIR \_\_\_\_\_ DATE \_\_\_\_\_  
TOWN COUNSEL REVIEW \_\_\_\_\_ DATE \_\_\_\_\_



**Town of Wayland**  
 41 COCHITUATE ROAD  
 WAYLAND MASSACHUSETTS 01778  
 www.wayland.ma.us TEL. 508-358-3788

**OFFICE STAFF**

Ellen M. Brideau, MAA Director of Assessing  
 Donald Clarke, MAA Assistant Assessor  
 Jessica Marchant, MAA Administrative Assessor  
 Savitri Ramgoolam, Department Assistant

**BOARD OF ASSESSORS**  
 Susan M. Rufo, Chair  
 Jayson Brodie, Vice Chair  
 Zachariah L. Ventress  
 Steven M. Glovsky

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**MEMO**

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**TO:** BOARD OF ASSESSORS  
**FROM:** ELLEN BRIDEAU, DIRECTOR OF ASSESSING  
**SUBJECT:** FY 17 CIRCUIT BREAKER MATCH APPLICATIONS *Chub*  
**DATE:** 8/28/2017

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I have reviewed the following two (2) Circuit Breaker Match applications and recommend approval:

PID	Last Name	First Name	No	Street Address
38-013	LANDIS	JUDITH	201	OLD CONN PATH
46D-085	RICHARD	JOSEPH	150	WEST PLAIN ST

*Jayson Brodie 8/29/17*

*Zachariah L. Ventress*

Wayland Interim Revaluation  
Timeline to Tax Billing  
August 28, 2017

- September 6, 2017 - Mike Tarello from Vision to work with Ellen:
  - Review 2016 Sales
  - Migrate DB to 2017 calendar year
  - Update Cost Tables
  - Establish draft FY18 Values
  - Complete draft assessment reports
  - Ellen to forward draft files to BOA members upon completion
- September 18, 2017 - BOA meeting to review FY18 interim reval results
- October 2, 2017 - BOA meeting to finalize FY18 values to begin public disclosure
- October 3, 2017 - Ellen to upload files to Vision for website refresh
- October 18, 2017 - Postcard mailers sent to property owners
  - Website updated
- October 23-27, 2017 – Informal Hearings
- October 30-November 3, 2017 – Staff review and field work
- November 6, 2017 - BOA approval of final Values
- November 7, 2017 - Begin DOR / Gateway reporting
  - Submit valuation and new growth reports to DOR
- November 13, 2017 - Anticipated new growth certification
- November 14, 2017 - Special Town Meeting
- November 27, 2017 - Classification hearing with Board of Selectmen
- November 28, 2017 - Submit recap to DOR
- December 4<sup>th</sup>, 2017 - Anticipated tax rate approval
  - Submit tax billing files to VADAR for processing

**Summary by Land Use  
WAYLAND, MA**

08/28/2017

*2016 Sales*

Land Use Code	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Median A/S Ratio	Median Abs Disp	COD	Weighted Average
101	165	817,183	750,850	0.91	730,000	652,300	0.92	0.04	5.32%	0.92
		<b>817,183</b>	<b>750,850</b>	<b>0.91</b>	<b>730,000</b>	<b>652,300</b>	<b>0.92</b>	<b>0.04</b>	<b>5.32%</b>	<b>0.92</b>

**Summary by Land Use  
WAYLAND, MA**

08/28/2017

2017 Sales

Land Use Code	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Median A/S Ratio	Median Abs Disp	COD	Weighted Average
101	70	827,581	724,003	0.88	724,050	585,000	0.88	0.07	9.76%	0.87
		<b>827,581</b>	<b>724,003</b>	<b>0.88</b>	<b>724,050</b>	<b>585,000</b>	<b>0.88</b>	<b>0.07</b>	<b>9.76%</b>	<b>0.87</b>

**Summary by Land Use  
WAYLAND, MA**

08/28/2017

2016 Sales

Land Use Code	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Median A/S Ratio	Median Abs Disp	COD	Weighted Average
102	56	792,675	706,468	0.89	772,000	714,250	0.89	0.04	5.42%	0.89
		<b>792,675</b>	<b>706,468</b>	<b>0.89</b>	<b>772,000</b>	<b>714,250</b>	<b>0.89</b>	<b>0.04</b>	<b>5.42%</b>	<b>0.89</b>

**Summary by Land Use  
WAYLAND, MA**

08/28/2017

2017 Sales

Land Use Code	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Median A/S Ratio	Median Abs Disp	COD	Weighted Average
102	26	615,385	547,758	0.91	604,500	515,750	0.91	0.07	7.99%	0.89
		<b>615,385</b>	<b>547,758</b>	<b>0.91</b>	<b>604,500</b>	<b>515,750</b>	<b>0.91</b>	<b>0.07</b>	<b>7.99%</b>	<b>0.89</b>

**Summary by Land Use  
WAYLAND, MA**

08/28/2017

Land Use Code	Count	Mean Sale Price	Mean Appraised	Mean A/S Ratio	Median Sale Price	Median Appraised	Median A/S Ratio	Median Abs Disp	COD	Weighted Average
104	4	580,750	440,800	0.77	605,000	432,000	0.77	0.08	11.36%	0.76
TWO FAMILY		<b>580,750</b>	<b>440,800</b>	<b>0.77</b>	<b>605,000</b>	<b>432,000</b>	<b>0.77</b>	<b>0.08</b>	<b>11.36%</b>	<b>0.76</b>



# ASSESSOR - 1410

## FY19 BUDGET DRAFT

*(Based on 52.2 weeks)*

10141001	51: PERSONNEL SERVICES		
	51001 SALARIES		\$ 264,807.57
	<b>PERSONNEL SERVICES TOTAL</b>		<b>\$ 264,807.57</b>
10141002	52:EXPENSES:PURCHASE OF SERVICES		\$72,285
	52100 CONTRACTUAL SERVICES	\$40,700	
	Personal Property Appraisal - RRC	\$16,000	
	Vision	\$24,700	
	52101 PROFESSIONAL SERVICES	\$11,200	
	Software Support	\$1,000	
	ATB Support - Appraisal Services	\$5,000	
	Impact Notices	\$5,000	
	PDFs of property record cards	\$200	
	52110 MEETINGS & CONFERENCES	\$1,545	
	NRAAO		
	MMA		
	MAAO		
	MCAA		
	IAAO		
	52112 TRAINING & EDUCATION	\$8,000	
	Staff required to maintain designations		
	BOA members required to take State Course work		
	52113 TRAVEL	\$4,000	
	Travel to Meetings & Conferences		
	52116 EQUIPMENT REPAIRS & MAINTENANCE	\$0	
	52114 DUES, SUBSCRIPTIONS, MEMBERSHIPS	\$3,140	
	MARSHALL	\$1,200	
	MLS	\$550	
	MCAA (4)	\$100	
	MAAO (7)	\$350	
	IAAO (1*\$225, 2*175, 3*\$25)	\$750	
	NRAAO (3)	\$120	
	Gatehouse	\$70	
	52130 PRINTING	\$1,600	
	52158 ADVERTISING LEGAL	\$600	
	52160 MILEAGE REIMBURSEMENT	\$1,500	
10141002	54:EXPENSES:SUPPLIES		\$1,665
	54100 SUPPLIES	\$400	
	54115 CLOTHING ALLOWANCE	\$1,065	
	3 employees X \$355		
	54121 POSTAGE	\$200	
	<b>EXPENSES TOTAL</b>		<b>\$1,665</b>
	<b>DEPARTMENT TOTAL</b>		<b>\$338,758</b>

# ASSESSOR - 1410 FY18 BUDGET DETAIL

(Based on 52.2 weeks)

10141001 51: PERSONNEL SERVICES		SALARY
51001 SALARIES		
<b>PERSONNEL SERVICES TOTAL</b>		<b>\$261,394</b>
10141002 52:EXPENSES:PURCHASE OF SERVICES		\$47,485
52100 CONTRACTUAL SERVICES	\$12,900	
Personal Property Appraisal	\$7,400	
Vision	\$5,500	
52101 PROFESSIONAL SERVICES	\$16,200	
Software Support	\$1,000	
ATB Support - Appraisal Services	\$10,000	
Impact Notices	\$5,000	
PDFs of property record cards	\$200	
52110 MEETINGS & CONFERENCES	\$1,545	
NRAAO		
MMA		
MAAO		
MCAA		
IAAO		
52112 TRAINING & EDUCATION	\$8,000	
Staff required to maintain designations		
BOA members required to take State Course work		
52113 TRAVEL	\$4,000	
Travel to Meetings & Conferences		
52116 EQUIPMENT REPAIRS & MAINTENANCE	\$0	
52114 DUES, SUBSCRIPTIONS, MEMBERSHIPS	\$3,140	
MARSHALL	\$1,200	
MLS	\$550	
MCAA (4)	\$100	
MAAO (7)	\$350	
IAAO (1*\$225, 2*175, 3*\$25)	\$750	
NRAAO (3)	\$120	
Gatehouse	\$70	
52130 PRINTING	\$600	
52158 ADVERTISING LEGAL	\$600	
52160 MILEAGE REIMBURSEMENT	\$500	
10141002 54:EXPENSES:SUPPLIES		\$1,665
54100 SUPPLIES	\$400	
54115 UNIFORMS	\$1,065	
3 employees X \$355		
54121 POSTAGE	\$200	
<b>EXPENSES TOTAL</b>		<b>\$49,150</b>
<b>DEPARTMENT TOTAL</b>		<b>\$310,544</b>



## MEMORANDUM

**TO:** All Department Heads  
**FROM:** Brian Keveny, Finance Director  
**DATE:** August 17, 2017  
**SUBJECT:** FY 2019 Capital and Operating Budget Instructions

The Finance Committee has not approved the FY 2019 Budget Guideline. It is expected that the final FY 2019 Capital and Operational Guidelines will be finalized in September 2017.

There will be a meeting with the Finance Director for all department heads on **Thursday, August 17<sup>th</sup> at 9:15 a.m.** in the Selectman's meeting room. I will discuss the Town's financial outlook for FY19 and the process of submitting your operating and capital budget requests and answer questions regarding the Town's finances. Budget deadlines are summarized at the end of this memo.

Finance Director will be available to assist with explaining the budget process.

### Purpose of Memo:

The purpose of this memorandum is to provide an overview of the FY 2019 Capital and Operating Budget process in advance of the Finance Committee FY 19 Budget Guideline. When the final guideline is published in September you will be able to modify your budget requests based on the goals and objectives of the Finance Committee Guideline.

### Key department budget points:

- The Finance Committee final guideline will determine the overall objective of the FY 19 Budget and identify if the departmental budgets are to be level service, level funded or some other criteria.
- Review your FY 17 budget to actual reports and identify any large turnback. A schedule of turnbacks resulting from FY 17 appropriations is attached for review. Determine if your FY 19 budget could be impacted by FY 17 turnbacks.
- In preparing your FY 19 Personnel Services budget be aware that the FY 18 Personnel Services budget does not include any settled contract increases. As a result your FY 19 Personnel Services budget submission should not include any FY 18 or FY 19 COLA increases.
- FY 17 final budget to actual MUNIS reports will be emailed to you as well as the FY 18 budget report.

### **FY 2019 Departmental Budget Preparation**

**FY 2019 Operating Budget Requests:** Operating budget requests are to be based on amounts deemed necessary to operate the departments. Identify in your budgets any changes to departmental operations that would either increase or decrease funding in FY 19. Please take into consideration cost changes related to utilities and any settled wage contracts. Detail any changes in your FY 19 budget by completing the Explanatory Statements of Changes Form.

Operating budget requests for each department are to be submitted on the FY19 Budget Detail form with detail entered that totals each line item account number amount. The FY19 Budget Detail form, an example of the level of detail required and a copy of your department's FY18 Budget Detail form will be provided. **Please submit completed DRAFT FY19 Budget Detail forms to Beth Doucette via email by Friday, September 8.** *(Note that budgets are subject to revision throughout the approval process).*

**FY 2019 DRAFT Capital Requests:** DRAFT Capital Requests for each department are to be submitted, together with the Operating Budget Requests, with as much detail and backup information as possible, in any format (The CIP Form is not required at this time). **Please submit DRAFT FY19 Capital Requests to Beth Doucette via email by Friday, September 8.**

**Salary Items:** In FY 18 departmental personnel services budgets were appropriated based on FY 17 wages and any steps. Your estimated FY 19 budget should be based on the FY 18 budget plus any obligated steps. Do not include any COLA increases in your initial FY 19 budget. If salary contracts are settled and approved at Town Meeting, you will need to adjust your personnel services budgets in November to include such settlements. If you are intending on adding staff to your department then include the estimated salary cost of each new employee in your initial budget. Prior to insertion into your FY 19 budget proposal, any proposed new employees should first be approved by your supervisory board or supervisory authority. This paragraph does not apply to the School Department.

**New FY 2019 Requested Employees:** In addition to proposed changes in personnel being discussed with your respective supervisory boards, committees, or authority, any such changes will also need to be presented to the Wayland Personnel Board. Forms to request new employees or changes to existing positions will be provided on August 17<sup>th</sup>. A schedule of meeting dates will be published in September. As noted above, and with the approval of your supervisor or supervisory board, include the cost of the proposed new employees in your initial personnel services budgets.

**Non-salary Items:** These accounts should be budgeted at the amounts anticipated to provide the same service during FY19. In addition, if you are required to provide a new service or discontinue a service include the costs of these changes in your initial budget submission.

**Review and Approval Process:** After submission of your department's completed FY19 Budget Detail form it must then be reviewed and approved by the respective supervisory boards, committees, or authority by **Monday, September 25**. The approved FY19 Budget Detail form shall then be forwarded to Beth Doucette by **Tuesday, September 26** for review by the Town Administrator.

Following the completion of this process, each department will enter their budget in the Munis financial system by **Friday, October 27<sup>th</sup> at noon**.

**Department Budget Preparation Summary:**

The Finance Committee will publish the FY 2019 Budget Guideline in September.

- Include in your budget:
  - New proposed employees and new or discontinued services.
  - Highlights of budget changes.
  - Key issues facing your department.
- Review your FY 2017 final expenditure reports and identify the cause of any large appropriation turnbacks as this may affect your Fiscal 2019 budget.
- Identify any new services that you may need to provide in FY 2020 thru FY 2023.
- The “Explanatory Statement of Changes” will be required for each departmental budget.
- Submit completed DRAFT FY19 Budget Detail forms and DRAFT Capital Requests to Beth Doucette via email by **Friday, September 8.**
- Review and obtain approval of your budgets with your respective boards, committees, or supervisory authorities by **Monday, September 25.**
- Forward approved Budget Detail forms to Beth Doucette via email by **Tuesday, September 26.**
- Operating budgets shall be submitted through the MUNIS financial system by **Friday, October 27<sup>st</sup> at noon.**

**FY2019 Capital Budget Requests:** The precise amount available has not been determined and will depend on funding sources and length of borrowing terms to create a capital budget without increased tax impact to our residents.

The Finance Committee will follow the Capital Improvement Plan (CIP) again this year. As a reminder, the capital budget includes all items with a cost of \$25,000 or greater and a useful life of 5 or more years. All Capital Budget items must be included in your Capital Budget request and NOT be submitted as separate Town Meeting articles.

The CIP form is the same as the previous year. Please use the expandable window to describe your CIP in detail. In addition:

- Complete a separate “CIP Request Form” for each request as well as the summary excel file outlining your projects over the next 5 years. Attached is a copy of the “CIP Request Form” and “5 YEAR CAPITAL PLAN” template. Note: the evaluation criteria should be completed for FY 2019, FY 2020 and FY 2021 requests only. Cost should include or identify any study or design costs.
- Complete a 5-year capital project plan in Excel for FY -19 thru FY- 23.
- Make sure you fully complete the CIP Request Form. The forms will be reviewed by the Finance Director and by the liaisons from the Finance Committee and the Board of Selectmen (lists attached). Forms that have not been fully completed will be returned and should be completed where noted by the reviewer. If the forms are then returned incomplete, they will be deemed unacceptable and will not be reviewed for consideration.
- All building related requests (major repairs and new buildings) need to flow through Ben Keefe, Public Buildings Director. He will submit the final CIP form for those requests.
- Amounts requested for outer years should reflect your best estimate of the future cost for purchase/repair since the cost 3 or 4 years from now would be more than the current cost to purchase/repair.
- We expect most items on the existing CIP plan will be carried forward from the last years forecast.

- Requests that are to be funded with CPA funds, such as new fields or historic preservation should also be included. The Community Preservation Committee must approve the funding sources for the project prior to being submitted as part of your capital request.
- The default funding is borrowing, cash capital and free cash. If there are any other available sources of funding or partial funding, identify the source at the bottom of the form.
- Please be prepared to discuss the status of all your open capital projects and provide estimated completion dates as well as anticipated unexpended funds. Prior to consideration of new capital projects, estimated completion dates and estimated costs to complete previously approved projects will be required.
- DEFINITION OF CAPITAL PROJECT: Estimated cost of \$25,000 or more and a useful life of 5 years or more. Includes the construction or reconstruction of existing capital assets, municipal buildings, recreational facilities, roads, landfills, and acquisition of land, equipment, vehicles and other personal property.
- Please complete a Separate CIP Request Form for ALL Projects for Period FY 19 - FY 23
- Complete Five – Year Capital Plan Summary (Excel)FY 19 – FY 23
  - Requires completion of evaluation criteria for FY 19, 20 and 21 only
  - Requires complete explanation of reasons for any changes to last year’s five-year plan
  - Cost estimates must be well documented for FY 19, 20 and 21.
  - Please review and refer all capital projects for buildings with Ben Keefe.

#### OUTSTANDING CAPITAL PROJECTS

- Before submitting any Capital Requests for FY19 and beyond, please review your existing capital projects. Close out the balances of those projects that have been completed and prepare a written status report for each outstanding project that includes a completion date and expected turnback figure. Please note all outstanding capital projects that were approved at Annual Town Meeting 2015 and prior that have not been completed will be closed out on October 27th unless a compelling case is presented to the Finance Committee prior to October 6th as to why the project should remain open.

**The deadline for submitting capital requests is Friday, September 29<sup>th</sup> at noon to Brian Keveny, Finance Director, electronically by e-mail.**

\* \* \*

#### To summarize:

1. **Meeting:** Department Head meeting with the Finance Director, **Thursday, August 17<sup>th</sup> at 9:15 a.m.**
2. Completed DRAFT Operating Budget Detail forms and DRAFT Capital Requests shall be submitted via email to Beth Doucette by **Friday, September 8.**
3. Review and approval of your budgets with your respective boards, committees, or supervisory authorities shall be completed by **Monday, September 25.**
4. Approved Budget Detail forms shall be submitted to Beth Doucette via email by **Tuesday, September 26.**
5. **Capital:** The CIP request forms for Fiscal 2019, 2020 and 2021, 5-year summary excel file and any additional attachments need to be submitted electronically by e-mail to Brian Keveny, Finance Director at bkeveny@wayland.ma.us by **Friday, September 29<sup>th</sup> at noon.** Name each CIP file starting with your department name, fiscal year and then the capital item, example “Fire CIP Request FY19 – Ambulance” etc.
6. Operating budgets shall be submitted through the MUNIS financial system by **Friday, October 27<sup>th</sup> at noon.**

As in past years, all budget meetings with the Finance Committee will be scheduled during Monday evenings in January. The Finance Committee is also considering reviewing both your departmental budget and CIP forms at the same time prior to January. More information on this will follow. The dates and specific times for these department budget hearings will be distributed later.

We thank you in advance for your assistance in the budget process.

**Summary of Timeline:**

- 1) **FY 19 MUNIS budget module open August 18<sup>th</sup>**
- 2) **FY19 DRAFT Operating Budget Detail forms and DRAFT Capital Requests due by September 8<sup>th</sup>**
- 3) **Review and approval of Operating Budget Detail with your respective boards, committees, or supervisory authorities completed by September 25<sup>th</sup>**
- 4) **Approved Budget Detail forms submitted to Beth Doucette by September 26<sup>th</sup>**
- 5) **CIP and 5-year capital plan due by September 29<sup>th</sup>**
- 6) **FY 19 Operating budget submitted through MUNIS financial system by October 27<sup>th</sup>**

**Important Reminders:**

- 1) **Review both Capital and Operating Budgets with your respective supervisory or supervisory authority prior to submitting budgets.**
- 2) **Review all proposed new employees with your respective supervisory or supervisory authority prior to meeting with the Wayland Personnel Board.**

Town of Wayland, Ma

DEPARTMENT	FINAL FISCAL 2017 BUDGET	FISCAL 2017 ACTUAL	FISCAL 2017 ENCUMBRANCE	FISCAL 2017 VARIANCE BUDGET / ACTUAL	Turnback as % Budget
SELECTMEN	30,000.00	17,575.00	1,000.00	11,425.00	38.08%
TOWN OFFICE SALARY	465,375.00	460,581.00	-	4,794.00	1.03%
TOWN OFFICE EXPENSES	81,500.00	63,923.00	7,898.00	9,679.00	11.88%
PERSONNEL BOARD SALARY	5,000.00	2,431.00	-	2,569.00	51.38%
PERSONNEL BOARD EXPENSES	10,000.00	4,430.00	450.00	5,120.00	51.20%
FINANCE SALARY	348,794.00	347,969.00	-	825.00	0.24%
FINANCE EXPENSE	56,700.00	55,060.00	-	1,640.00	2.89%
ASSESSOR SALARY	259,626.00	250,216.00	-	9,410.00	3.62%
ASSESSOR EXPENSES	52,250.00	39,392.00	8,989.00	3,869.00	7.40%
TREASURER SALARY	190,104.00	186,737.00	-	3,367.00	1.77%
TREASURER EXPENSES	100,100.00	32,597.00	5,500.00	62,003.00	61.94%
LEGAL	200,000.00	164,082.00	35,204.00	714.00	0.36%
INFORMATION TECH SALARY	275,316.00	234,633.00	-	40,683.00	14.78%
INFORMATION TECH EXPENSES	521,957.00	339,472.00	178,109.00	4,376.00	0.84%
TOWN CLERK SALARY	125,781.00	125,233.00	-	548.00	0.44%
TOWN CLERK EXPENSES	17,330.00	13,634.00	3,180.00	516.00	2.98%
ELECTIONS SALARY	37,908.00	36,738.00	-	1,170.00	3.09%
ELECTIONS EXPENSES	11,770.00	11,694.00	-	76.00	0.65%
REGISTRAR SALARY	275.00	275.00	-	-	0.00%
REGISTRAR EXPENSES	5,000.00	4,598.00	-	402.00	8.04%
CONSERVATION SALARY	170,402.00	143,561.00	-	26,841.00	15.75%
CONSERVATION EXPENSES	48,700.00	42,447.00	5,425.00	828.00	1.70%
PLANNING SALARY	105,000.00	98,090.00	-	6,910.00	6.58%
PLANNING EXPENSES	4,500.00	3,035.00	-	1,465.00	32.56%
SURVEYOR SALARY	169,118.00	169,041.00	-	77.00	0.05%
SURVEYOR EXPENSES	31,412.00	26,796.00	1,000.00	3,616.00	11.51%
FACILITIES SALARY	277,932.00	265,945.00	-	11,987.00	4.31%
FACILITIES EXPENSES	880,500.00	703,802.00	36,977.00	139,721.00	15.87%
MISC COMMITTEES	47,275.00	23,588.00	21,946.00	1,741.00	3.68%
<b>TOTAL GENERAL GOVERNMENT</b>	<b>4,529,625.00</b>	<b>3,867,575.00</b>	<b>305,678.00</b>	<b>356,372.00</b>	<b>7.87%</b>
POLICE SALARY	2,356,693.00	2,350,058.00	-	6,635.00	0.28%
POLICE EXPENSES	310,110.00	261,150.00	21,505.00	27,455.00	8.85%
JOINT COMMUNICATIONS SALARY	496,675.00	482,735.00	-	13,940.00	2.81%
JOINT COMMUNICATIONS EXPENSES	27,100.00	26,999.00	-	101.00	0.37%
EMERGENCY MANAGEMENT	23,000.00	16,441.00	6,500.00	59.00	0.26%
DOG OFFICER	22,000.00	21,977.00	-	23.00	0.10%
FIRE SALARY	2,492,921.00	2,345,969.00	-	146,952.00	5.89%
FIRE EXPENSES	258,400.00	256,868.00	883.00	649.00	0.25%
BUILDING & ZONING SALARY	311,497.00	278,234.00	-	33,263.00	10.68%
BUILDING & ZONING EXPENSES	52,001.00	42,909.00	-	9,092.00	17.48%
<b>TOTAL PUBLIC SAFETY</b>	<b>6,350,397.00</b>	<b>6,083,340.00</b>	<b>28,888.00</b>	<b>238,169.00</b>	<b>3.75%</b>



Town of Wayland, Ma					Turnback as % Budget
DEPARTMENT	FINAL FISCAL 2017 BUDGET	FISCAL 2017 ACTUAL	FISCAL 2017 ENCUMBRANCE	FISCAL 2017 VARIANCE BUDGET / ACTUAL	
WAYLAND PUBLIC SCHOOLS	37,722,833.00	37,169,539.00	483,611.00	69,683.00	0.18%
MINUTEMAN REGIONAL SC	93,215.00	93,215.00	-	-	0.00%
<b>TOTAL EDUCATION</b>	<b>37,816,048.00</b>	<b>37,262,754.00</b>	<b>483,611.00</b>	<b>69,683.00</b>	<b>0.18%</b>
HIGHWAY SALARY	1,030,407.00	939,666.00	-	90,741.00	8.81%
HIGHWAY EXPENSES	302,500.00	254,160.00	44,737.00	3,603.00	1.19%
SNOW REMOVAL SALARY	200,000.00	176,405.00	-	23,595.00	11.80%
SNOW REMOVAL EXPENSES	585,000.00	585,000.00	-	-	0.00%
TRANSFER STATION	65,000.00	41,821.00	-	23,179.00	35.66%
PARKS SALARY	556,441.00	550,556.00	-	5,885.00	1.06%
PARKS EXPENSES	293,000.00	265,556.00	18,897.00	8,547.00	2.92%
<b>TOTAL PUBLIC WORKS</b>	<b>3,032,348.00</b>	<b>2,813,164.00</b>	<b>63,634.00</b>	<b>155,550.00</b>	<b>5.13%</b>
BOARD OF HEALTH SALARY	679,384.00	676,423.00	-	2,961.00	0.44%
BOARD OF HEALTH EXPENSES	179,356.00	146,315.00	2,889.00	30,152.00	16.81%
VETERANS SERVICES	48,000.00	36,548.00	383.00	11,069.00	23.06%
C.O.A. SALARY	207,486.00	204,743.00	-	2,743.00	1.32%
C.O.A. EXPENSES	56,000.00	52,393.00	611.00	2,996.00	5.35%
YOUTH SERVICES SALARY	222,400.00	221,078.00	-	1,322.00	0.59%
YOUTH SERVICES EXPENSES	4,075.00	3,775.00	-	300.00	7.36%
<b>TOTAL HEALTH / HUMAN SERVICES</b>	<b>1,396,701.00</b>	<b>1,341,275.00</b>	<b>3,883.00</b>	<b>51,543.00</b>	<b>3.69%</b>
LIBRARY SALARY	823,000.00	788,488.00	-	34,512.00	4.19%
LIBRARY EXPENSES	233,200.00	232,530.00	29.00	641.00	0.27%
RECREATION SALARY	172,000.00	158,939.00	-	13,061.00	7.59%
<b>TOTAL CUTURAL</b>	<b>1,228,200.00</b>	<b>1,179,957.00</b>	<b>29.00</b>	<b>48,214.00</b>	<b>3.93%</b>
DEBT	7,507,251.00	7,470,289.00	-	36,962.00	0.49%
RETIREMENT ASSESSMENT	4,235,414.00	4,235,414.00	-	-	0.00%
UNCLASSIFIED	-	-	-	-	-
INSURANCE GENERAL	628,157.00	621,417.00	-	6,740.00	1.07%
INSURANCE 32B	7,165,000.00	6,720,157.00	351,988.00	92,855.00	1.30%
MEDICARE TAX	628,000.00	627,037.00	-	963.00	0.15%
UNEMPLOYMENT	58,000.00	28,407.00	-	21,593.00	43.19%
POLICE / FIRE DISABILITY	15,000.00	1,389.00	-	13,611.00	90.74%
RESERVE FOR SALARY ADJ	9,449.00	-	-	9,449.00	100.00%
OCCUPATIONAL HEALTH	8,000.00	4,356.00	240.00	3,404.00	42.55%
BUY BACK	40,000.00	27,921.00	-	12,079.00	30.20%
TOWN MEETING	100,000.00	63,645.00	-	36,355.00	36.36%
STREET LIGHTING	130,000.00	122,850.00	7,605.74	(455.74)	-0.35%
RESERVE FUND	29,403.00	-	-	29,403.00	100.00%
<b>TOTAL UNCLASSIFIED / OTHER</b>	<b>20,545,674.00</b>	<b>19,922,882.00</b>	<b>359,833.74</b>	<b>262,958.26</b>	<b>1.28%</b>
TRANSFER TO OTHER FUNDS-Capital	87,301.00	87,301.00	-	-	-
CASH CAPITAL	185,000.00	185,000.00	-	-	0.00%
USE OF FREE CASH FOR CAPITAL	466,001.00	466,001.00	-	-	0.00%
RECREATION TRANSFER	482,618.00	482,618.00	-	-	-
OVERLAY	620,322.00	-	-	620,322.00	100.00%
TRANSFER TO FUND 24- FEMA	180.00	180.00	-	-	-
TRANSFER TO SEPTAGE	-	7,615.00	-	(7,615.00)	-
TRANSFER TO OPEB	215,285.00	215,285.00	-	-	0.00%
INTERFUND BORROWING TO WATER	-	500,000.00	-	(500,000.00)	-
<b>TOTAL TRANSFERS</b>	<b>2,056,707.00</b>	<b>1,944,000.00</b>	<b>-</b>	<b>112,707.00</b>	<b>5.48%</b>
STATE ASSESSMENTS & CHARGES	181,522.00	147,287.00	-	34,235.00	18.86%
<b>TOTAL UNAPPROPRIATED</b>	<b>181,522.00</b>	<b>147,287.00</b>	<b>-</b>	<b>34,235.00</b>	<b>18.86%</b>
<b>Totals</b>	<b>77,137,222.00</b>	<b>74,562,234.00</b>	<b>1,245,556.74</b>	<b>1,329,431.26</b>	<b>1.72%</b>

**Explanatory Statement of Changes in Expenses Template**  
**Department/Committee/etc. (name of your entity):** \_\_\_\_\_

Item description	Salary or Expense type	FY 18 Appropriated	FY 19 Proposed	Change	Detailed explanation/supporting rationale
Salaries	Salary			\$0.00	
Contract services	Expense			\$0.00	
Training	Expense			\$0.00	
Dues	Expense			\$0.00	
Supplies	Expense			\$0.00	
				\$0.00	
All Other-Net		\$0.00	\$0.00	\$0.00	
<b>Total</b>		<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	



@waylandfincom

# TOWN OF WAYLAND

41 COCHITUATE ROAD  
WAYLAND, MASSACHUSETTS  
01778

FINANCE COMMITTEE  
STEVEN CORREIA  
JEN GORKE  
CAROL MARTIN (Vice Chair)  
KLAUS SHIGLEY  
WILLIAM STEINBERG  
GEORGE UVEGES  
DAVE WATKINS (Chair)

## FINAL FINANCE COMMITTEE FY19 LIAISON ASSIGNMENTS

No	Subject	Organization	Primary	Backup
1.)	Governance	Board of Selectman	Dave Watkins	Carol Martin
		Town Administrator	Dave Watkins	Carol Martin
		Finance Director	Dave Watkins	Carol Martin
2.)	General Government	Town Clerk	Dave Watkins	Carol Martin
		Information Technology	Dave Watkins	
		Personnel Board	Dave Watkins	Carol Martin
		Historical Commission	Dave Watkins	Carol Martin
		Historical District Commission	Dave Watkins	Carol Martin
		Public Ceremonies Committee	Dave Watkins	Carol Martin
3.)	Finance	Board of Assessors	George Uveges	
		Treasurer's Office	George Uveges	
		Commissioner of Trust Funds/Trustee of the Allen Fund	George Uveges	
4.)	Education & Library	School Committee	Klaus Shigley	Carol Martin
		Board of Library Trustees	Jen Gorke	Bill Steinberg
5.)	Planning & Natural Resources	Conservation Commission	Steve Correia	
		Community Preservation Committee	Carol Martin	Steve Correia
		Sudbury, Assabet and Concord River Stewardship Council	Steve Correia	
		Planning Board	Bill Steinberg	
		Town Surveyor	Bill Steinberg	
		Zoning Board of Appeals	Bill Steinberg	
		Permanent Municipal Building Advisory Committee	Bill Steinberg	
6.)	Public Services	Energy Initiatives Advisory Committee	Steve Correia	
		Board of Health	Klaus Shigley	
		Facilities	Bill Steinberg	George Uveges
		Inspection/Building Department	Bill Steinberg	
		Department of Public Works	Carol Martin	George Uveges
		Surface Water Quality Committee	Steve Correia	
		Recreation Commission	Bill Steinberg	
7.)	Public Safety	Wastewater Management District Commission	Bill Steinberg	
		Fire Department	George Uveges	Jen Gorke



@waylandfincom

# TOWN OF WAYLAND

41 COCHITUATE ROAD  
WAYLAND, MASSACHUSETTS  
01778


FINANCE COMMITTEE  
STEVEN CORREIA  
JEN GORKE  
CAROL MARTIN (Vice Chair)  
KLAUS SHIGLEY  
WILLIAM STEINBERG  
GEORGE UVEGES  
DAVE WATKINS (Chair)

## FINAL FINANCE COMMITTEE FY19 LIAISON ASSIGNMENTS

No	Subject	Organization	Primary	Backup
		Police Department	Jen Gorke	George Uveges
		Auxiliary Police	Jen Gorke	George Uveges
		Local Emergency Planning Committee	George Uveges	Jen Gorke
		Dog Control Officer	Jen Gorke	
8.)	Community Services	Council on Aging	Carol Martin	Steve Correia
		Senior Tax Relief Committee	Steve Correia	
		Wayland Community Fund	Steve Correia	
		Veteran's Agent	Steve Correia	
		Youth Advisory Committee	Steve Correia	
		Wayland Housing Authority	Carol Martin	
		Cultural Council	Steve Correia	
		Department of Economic Development	Steve Correia	

# Instructions for Using the Excel Capital Form

The Finance Committee uses a special Macro enabled excel form to collect Capital Improvement Plan Requests as indicated below:



**TOWN OF WAYLAND**  
48 CHOCOLATE ROAD  
WAYLAND, MASSACHUSETTS 01776

**CAPITAL APPROPRIATION REQUEST  
FY18 - FY22 (FIVE YEARS)**

**1** PROJECT INFO

**3** PROJECT SPONSOR

**5** APPROVING BODY / UNIT

**7** PROJECT DESCRIPTION

**7** PROJECT JUSTIFICATION

**8** EVALUATION CRITERIA (Applies to current year budget request only)

- A. ALTERNATIVE APPROACHES NOT NEEDED
- B. MAINTAINS OR IMPROVES THE STANDARD OF SERVICE
- C. DEMONSTRATES VALUE OF REGULATION REQUIREMENTS
- D. OPERATIONAL EFFICIENT DESIGN
- E. OTHER REASONS TO PROCEED WITH

**2** PROJECT TITLE

**4** SPONSOR ADVOCATE NAME

**6** CONTACT NAME AND EMAIL ADDRESS

**9** YES OR NO ANSWER

Year for Budget	Fiscal Year	Fund Name	Amount
2018	2018		
2019	2019		
2020	2020		
2021	2021		
2022	2022		
TOTAL			

**10** CAPITAL APPROPRIATION REQUEST SUMMARY

Category	2018	2019	2020	2021	2022	TOTAL	% of Budget
Capital Expenditure							
Operating Expenses							
Capital Expenditure							
Operating Expenses							
TOTAL							

**11** CAPITAL APPROPRIATION REQUEST SUMMARY

Category	2018	2019	2020	2021	2022	TOTAL	% of Budget
Capital Expenditure							
Operating Expenses							
Capital Expenditure							
Operating Expenses							
TOTAL							

**12** CAPITAL APPROPRIATION REQUEST SUMMARY

Category	2018	2019	2020	2021	2022	TOTAL	% of Budget
Capital Expenditure							
Operating Expenses							
Capital Expenditure							
Operating Expenses							
TOTAL							

**13** WARRANT TABLE

Category	2018	2019	2020	2021	2022	TOTAL	% of Budget
Capital Expenditure							
Operating Expenses							
Capital Expenditure							
Operating Expenses							
TOTAL							

No	Description	Instructions	Warrant Map
1	Project Info: <u>Project Title</u>	Provide a 3-5 word general description of the request so people can easily understand.	2
2	Project Info: <u>Included in Prior 5 Year Capital Plan</u>	Yes or No Answer. This indicates whether this is a new request or something that was included in a previous year's plan.	9
3	Project Sponsor: <u>Sponsor (advocate) Name</u>	This is the Title of the person who has the role of Department Head. Please do not use their name.	3

No	Description	Instructions	Warrant Map
4	<b>Project Sponsor: <u>Contact Information</u></b>	This is the email address of the lead person responsible for the Capital Request. This is used to communicate and coordinate the development of the Capital Plan.	
5	<b>Approving Body/Vote: <u>Contact Name and Email Address</u></b>	This field is used to capture the main representative and the Town Organization responsible for creating the Plan.	
6	<b>Approving Body/Vote: <u>Date and Quantum of Vote</u></b>	As part of the proposed process, the ultimate Board, Committee etc. responsible for requesting the Capital Improvement Plan will vote and record the results of the vote on the form.	
7	<b>Project Description</b>	The Project description is a detailed description of the Capital Improvement Plan. This box will automatically expand when you type into it. If you have any issues, please make sure macros are enabled in our version of Excel.	4
8	<b>Project Justification</b>	The Project justification is an overview of why this Capital Improvement Plan has been requested and an understanding of the due diligence that has been performed. This box will automatically expand when you type into it. If you have any issues, please make sure macros are enabled in our version of Excel.	5
9	<b>Evaluation Criteria</b>	<p>This is related to funding requested in the current year only. This is used to help prioritize the need for the Capital Improvement Plan when compared to other competing requirements of the Town. Questions A through E should be evaluated based on the following criteria:</p> <ul style="list-style-type: none"> <li>• Does not meet or does not apply</li> <li>• Partially meets criteria</li> <li>• Fully meets Criteria</li> </ul>	
10	<b>Expenditure Schedule</b>	<p>This section is critical. For this Capital Improvement Plan, all costs should be accounted for the current and subsequent 5-year period.</p> <p>A Single Capital Improvement Plan is required for the current year and a schedule that supports the costs associated with subsequent year should be documented so that the Committee can evaluate the</p>	12, 13, 14

No	Description	Instructions	Warrant Map
		long term impact on Town Finances. Appendix A shows an example schedule.	
11	<b>Operational Budget Impact</b>	This section is used to help prioritize the Capital Improvement Plan. If you choose yes, please provide a detailed description.	
12	<b>Funding Sources</b>	It is important that we exhaust all sources of potential funding prior to making a borrowing request. For items marked yes, please provide sufficient details.	10
13	<b>Warrant Details: <u>Request Number</u></b>	This is the order in which the CIP is printed and referred to in the Warrant	1
13	<b>Warrant Details: <u>Department</u></b>	This is the department where this CIP will be implemented.	1,3
13	<b>Warrant Details: <u>Schedule</u></b>	Provide the Fiscal year this CIP pertains to (e.g. Fiscal Year 2018)	8
13	<b>Warrant Details: <u>Relationship to General Plan</u></b>	Provide a detailed description as to how the CIP relates to the general plan adopted for the Town.	5
13	<b>Warrant Details: <u>History</u></b>	Provide historical context for how why the CIP is needed.	7

**NEW POSITION REQUEST FORM**

Department: \_\_\_\_\_

Job Title \_\_\_\_\_

Full-Time: \_\_\_\_\_

Part Time: \_\_\_\_\_

If Part-time; # hours/weeks: \_\_\_\_\_

Estimated Hourly Rate: \_\_\_\_\_

Estimated Annual Rate \_\_\_\_\_

Effective Date Requested: \_\_\_\_\_

**Section A: Estimated Annual Costs:**

Base Wages \_\_\_\_\_

Overtime \_\_\_\_\_

Stipends \_\_\_\_\_

Clothing Allowance \_\_\_\_\_

Other (specify) \_\_\_\_\_

**Subtotal Estimated Personnel Expense** \_\_\_\_\_

Additive @ 40%  
(Insurances, retirement, etc.) \_\_\_\_\_

**Total Estimated Personnel Related Expenses** \_\_\_\_\_

Non Personnel Related Costs  
(Computer, office, furniture, etc.) \_\_\_\_\_

**Total Estimated Related Expenses** \_\_\_\_\_

**Section B: Funding**

Projected Funding Source \_\_\_\_\_



**Section C: Duties to be Performed (attach supplemental page if needed):**

**Section D: Justification for the Request (attach supplemental page if needed):**

Department Head: \_\_\_\_\_ Date: \_\_\_\_\_

Oversight Board or  
TA Approved \_\_\_\_\_ Date: \_\_\_\_\_

**Personnel Board Recommendation:**

Recommended: \_\_\_\_\_ Not Recommended: \_\_\_\_\_

Vote: \_\_\_\_\_ Date \_\_\_\_\_

**POSITION MODIFICATION REQUEST FORM**

Department: \_\_\_\_\_

Job Title: \_\_\_\_\_

Current Status:

Full-time: \_\_\_\_\_

Part-time: \_\_\_\_\_

Temporary: \_\_\_\_\_

Requested Status:

Full-time: \_\_\_\_\_

Part-time: \_\_\_\_\_

Temporary: \_\_\_\_\_

Effective Date Requested: \_\_\_\_\_

Section A: Estimated Costs:

Base Wages \_\_\_\_\_

Overtime \_\_\_\_\_

Stipends \_\_\_\_\_

Clothing Allowance \_\_\_\_\_

Other (specify) \_\_\_\_\_

Total Estimated Personnel Related Expenses \_\_\_\_\_

Section B: Change in Duties to be Performed

Section C: Justification for the Request

Department Head: \_\_\_\_\_

Date: \_\_\_\_\_

Oversight Board or

TA Approval: \_\_\_\_\_

Date: \_\_\_\_\_

# FINANCE

## BOARD OF ASSESSORS

At the April 2017 elections Jayson Brodie was re-elected and Steven M. Glovsky was elected, both to serve three year terms. Susan Rufo was elected to chair and Jayson Brodie to vice chair by the Board.

The Board of Assessors are responsible for administering Massachusetts property tax laws effectively and equitably and to produce accurate and fair assessments for all taxable property.

As required by the code of Wayland, Section 19-8 the Board of Assessors makes the following Report:

### A. Annual Report

(1.) The calendar year 2015 sales used in the determination of the FY'17 assessed values were posted to the Assessors web page and provided at Town Meeting.

(2. a, b, c) Report for the previous six years of abatement history:

FISCAL YEAR	# RECD (a)	# GRANTED (b)	AVG ABMT (c)
2012*	71	44	\$1,912.65
Supplemental	0	0	\$0.00
2013	34	18	\$1,854.20
Supplemental	1	1	\$616.87
2014	35	13	\$2,387.39
Supplemental	0	0	\$0.00
2015*	89	66	\$1,152.16
Supplemental	3	3	\$486.59
2016	34	22	\$2,368.68
Supplemental	0	0	\$0.00
2017	25	16	\$2,313.48
Supplemental	1		

\*DOR Triennial Revaluation year

(2. d) ATB filings last six years:

Fiscal Year	ATB Filings	Fiscal Year	ATB Filings
2012	5	2015	11
2013	6	2016	6
2014	10	2017	6

(2. e) Dollar change granted by ATB:

FISCAL YEAR	NO.	STREET	CHANGE IN ASSESSMENT	FISCAL YEAR	NO.	STREET	CHANGE IN ASSESSMENT
FY'12	59	OLD SUDBURY RD	\$42,800	FY'14	12	ELLIE LN	\$202,000
FY'13	12	ELLIE LN	\$55,500				

**(3). Inspections conducted during Fiscal Year 2017**

<b>Total Property Visits:</b>	<b>865</b>				
<b>Building Permits:</b>		<b>Cyclical:</b>		<b>Sales:</b>	
Interior and Exterior	97	Interior and Exterior	82	Interior and Exterior	128
Exterior Only	203	Exterior Only	152	Exterior Only	88
Interior Only	26	Interior Only	38	Interior Only	10
Refusals	2	Refusals	1	Refusals	
<b>Total</b>	<b>328</b>	<b>Total</b>	<b>273</b>	<b>Total</b>	<b>226</b>
<hr/>					
<b>Quality Control:</b>		<b>Abatements:</b>		<b>Informal Hearings:</b>	
Interior and Exterior	5	Interior and Exterior	16	Interior and Exterior	15
Exterior Only	2	<b>Total</b>	<b>16</b>	<b>Total</b>	<b>15</b>
Interior Only					
<b>Total</b>	<b>7</b>				

**\*Please note that some of the data verification visits addressed several requirements in one visit, such as a property requiring an abatement visit may also have required a sales visit. One visit would have met both obligations of data verification.**

Respectfully submitted,

Susan M. Rufo, Chair  
Zachariah Ventress

Jayson Brodie, Vice Chair  
Steven M. Glovsky