



TOWN OF SWAMPSCOTT
SELECT BOARD REGULAR SESSION MINUTES
NOVEMBER 30, 2022 – 6:00 P.M.
SWAMPSCOTT HIGH SCHOOL, 200 ESSEX STREET
ROOM B129 & VIRTUALLY

SELECT BOARD MEMBERS PRESENT: NEAL DUFFY, MARY ELLEN FLETCHER, DAVID GRISHMAN, KATIE PHELAN, PETER SPELLIOS

MEMBERS ABSENT: NONE

OTHER TOWN OFFICIALS PRESENT: SEAN FITZGERALD, TOWN ADMINISTRATOR, AMY SARRO, DIRECTOR OF FINANCE & ADMINISTRATION/ASSISTANT TOWN ADMINISTRATOR, PATRICK LUDDY, TOWN TREASURER/COLLECTOR, GRAHAM ARCHER, FIRE CHIEF, RICHARD SIMMONS

OTHER: SUE BURGESS & MARTHA CURRY FROM S.U.R.E, DOUGLAS & DUNCAN MAITLAND, CHRISTOPHER RATLEY, & ROBERT LEVY

A. PUBLIC COMMENT: NONE

B. NEW & OLD BUSINESS:

- 1. SWAMPSCOTT UNITES RESPECTS & EMBRACES DIVERSITY (SURE)/TELL US YOUR STORY PROJECT:** SUE BURGESS & MARTHA CURRY FROM SURE: THIS WAS STARTED IN 2016, IS A VOLUNTEER COMMUNITY THAT EMBRACES ALL DIVERSITY. SURE'S AIM IS TO PROMOTE UNDERSTANDING OF DIVERSITY, EDUCATIONAL OPPORTUNITIES TO EXPERIENCE & EXPLORE DIVERSITY, ASSIST THE COMMUNITY IN DEVELOPING CULTURAL COMPETENCY SKILLS, ENGENDER WELCOMING, NURTURING, RESPECTFUL AND INCLUSIVE COMMUNITY AND BE ALLIES TO THOSE IN OUR COMMUNITY FACING PREJUDICE OF ANY KIND. MS. CURRY ASKS THAT THE BOARD SUPPORT THE "TELL US YOUR STORY" PROJECT AND HELP THEM SPREAD THE WORD. THEY WILL BE COLLABORATING WITH THE SWAMPSCOTT PUBLIC LIBRARY, WHERE THEY WILL DISPLAY STORIES. STORIES WILL BE ARCHIVED AT THE LIBRARY AS WELL. MS. BURGESS & MS. CURRY WILL BE AT TOWN MEETING MONDAY NIGHT WITH A DISPLAY AND FORMS. A WEBSITE, WWW.SUREDIVERSITY.ORG, WILL HAVE A LINK TO THE PROJECT SOON. MR. GRISHMAN MET WITH RALPH AT THE SR. CENTER AND TALKED ABOUT THIS PROJECT WHICH INSPIRING HIM TO CALL AN AUNT AND TALK ABOUT HER GENEALOGY RESEARCH. HE FEELS THEY WILL GET INTERESTING STORIES FROM RESIDENTS. MR. DUFFY ECHOED MR. GRISHMAN'S SENTIMENTS. TA FITZGERALD STATED IT BREAKS DOWN ISOLATION, CREATES A CONNECTION BETWEEN GENERATIONS AND WILL HELP US UNDERSTAND OUR LIVES THROUGH OUR ANCESTORS.
- 2. DISCUSSION & POSSIBLE VOTE ON FIRE DEPT. COLLECTIVE BARGAINING AGREEMENT:** TA FITZGERALD AND CHIEF ARCHER HAVE BEEN NEGOTIATING FOR MONTHS WITH THE FIRE UNION. THE SELECT BOARD MET IN EXECUTIVE SESSION BUT HAVE NOT YET VOTED. THIS CONTRACT REFLECTS A YEAR-LONG EFFORT TO COME TO TERMS WITH A MULTI-YEAR CONTRACT. LAST YEAR, THE FIRE UNION WAS THE ONLY UNION NOT TO REACH AN AGREEMENT IN TIME FOR THE ANNUAL TOWN MEETING. CHIEF ARCHER: THIS WAS A LONG CONTRACT NEGOTIATION WITH A LOT OF BACK & FORTH BUT I FEEL WE REACHED A BALANCED DEAL THAT RECOGNIZES THE WORK THEY'VE DONE THROUGHOUT THE PANDEMIC.

THE CONTRACT INCLUDES ANNUAL COLA INCREASES (2.75%, 2.5%, 2.5%) WHICH FEEL REASONABLE AS WE HAVE SEEN SIGNIFICANT INCREASES IN CONSUMER PRICE INDEXES & INFLATION. THERE IS ALSO A NEW DEPARTMENTAL CIVILIAN, NON-UNION CLERICAL POSITION. THE CHIEF DISCUSSED THE CHALLENGES OF HAVING A PART-TIME CLERK/FULL TIME FIREFIGHTER MANAGE PAYROLL FOR A BUSY FIRE DEPT. THERE IS A CHANGE IN HIRING & PROMOTIONAL POLICIES. WHEN THE TOWN LEFT CIVIL SERVICE, THERE WAS A DISAGREEMENT BETWEEN TOWN & UNION ABOUT THE AGE CAP BUT HAVE FOUND COMMON GROUND AT AGE 35. IT IS IMPORTANT TO RECOGNIZE HAVING A BARRIER TO EMPLOYMENT (AGE CAP) WILL HURT OUR EFFORTS TO BE MORE INCLUSIVE. WOMEN TEND TO WAIT UNTIL THEIR CHILDREN ARE RAISED BEFORE EMBARKING ON A CAREER. IN THIS IS INCLUDED ADDITIONAL CONSIDERATION FOR VETERANS' STATUS & FOR THE SPOUSE OF A POLICE OFFICER OR FIREFIGHTER KILLED IN THE LINE OF DUTY. THIS CONTRACT SETTLES GRIEVANCES THAT HAVE RESULTED IN SIGNIFICANT TIME AND EFFORT. THE TOWN WAS PREPARED TO MOVE FORWARD AND ADDRESS THESE THROUGH A COSTLY & LENGTHY PROCESS BUT IT SEEMED PRUDENT TO SETTLE THEM WITH THIS CONTRACT. LASTLY, IS LANGUAGE THAT BOLSTERS THE TOWN'S ABILITY TO SUPPORT STAFFING BASED ON THE FIRE CHIEF'S JUDGEMENT. THE CHIEF HAS TO PROVIDE A 14-DAY NOTICE WITH A QUANTITATIVE ANALYSIS BEFORE CHANGING MINIMUM MANNING.

IN CONSIDERATION FOR FIREFIGHTERS' SERVICE DURING THE PANDEMIC, RECOGNITION FOR NOT FILLING UNFILLED POSITIONS AND LOST OVERTIME AS WELL AS RAISING THE AGE CAP TO 35, UNION MEMBERS WILL GET A ONE-TIME PAYMENT OF \$4,500; FIRE DEPT STAFF SERVED AS DEPUTY HEALTH AGENTS DURING THE PANDEMIC FOR WHICH THEY WILL GET A ONE-TIME \$500 STIPEND; ALSO

INCLUDED IS A \$1,000 HAZARDOUS MATERIAL (FIREFIGHTER GEAR CONTAINS FOREVER CHEMICALS) STIPEND IN JANUARY WHICH WILL INCREASE TO \$1,500 IN JANUARY 2024; EFFECTIVE 7/1/22, JUNETEENTH WILL BE RECOGNIZED AS A HOLIDAY.

MS. SARRO DISCUSSED FINANCES: FUNDS FOR COLA PAYMENTS AND STIPENDS WILL BE PAID OUT BY: \$59,965 CERTIFIED FREE CASH, \$223,000 ARPA FUNDS (LEAVING THE TOWN WITH JUST UNDER \$4MM), \$32,747 FUNDS IN SALARY RESERVE. PAYMENTS BREAK DOWN AS FOLLOWS (INCLUDING COLAS): YEAR ONE - \$92,712 (2.75% COLA PAYMENT, SPLIT BETWEEN \$32,747 IN SALARY RESERVE & \$59,965 FREE CASH), \$223,000 (\$4,500 ONE-TIME STIPEND FOR PANDEMIC AND SETTling OF GRIEVANCES, \$19,000 FOR WORKING AS HEALTH AGENTS DURING THE PANDEMIC, AND \$33,000 HAZARDOUS STIPEND) = \$315,712; YEAR TWO = \$89,328 (2.5% COLA INCREASE AND HAZ STIPEND); YEAR THREE = \$73,296 (2.5% COLA INCREASE & HAZ STIPEND). FREE CASH HAS BEEN CERTIFIED AND IS \$3,630,509. ARTICLE 3 IN THE SPECIAL TOWN MEETING WARRANT WILL BE THE VOTE TO USE FREE CASH FOR THE ONE-TIME STIPENDS.

SELECT BOARD MEMBERS COMMENTS:

- MR. DUFFY: APPRECIATES ALL THE WORK THAT HAS BEEN DONE. WE'VE DONE A LOT OF CONTRACTS IN MY 2 YEARS. WHILE NOT NECESSARILY COMFORTABLE WITH THEM HE DEFERS TO THE NEGOTIATING TEAM. THIS IS THE MOST UNCOMFORTABLE I'VE BEEN WITH ANY CONTRACT I'VE HAD TO CONSIDER AND WILL PUT A STRAIN ON THE TOWN & THE BUDGET. I WILL SUPPORT IT TONIGHT, MAINLY BECAUSE THERE IS NO ALTERNATIVE THAT WILL COST LESS AND HOPE THIS WILL HELP THE TOWN & FIRE DEPT. MOVE ON. IF WE DON'T COME TO AN AGREEMENT HERE, SOME OF THESE ISSUES WILL LIKELY BE DECIDED BY LABOR BOARDS OR ARBITRATORS.
- MS. FLETCHER ASKED ABOUT THE AGE CAP, CONCERNED THAT WOMEN LOOKING TO MAKE A CAREER CHANGE AFTER RAISING CHILDREN WON'T BE ABLE TO BE FIREFIGHTERS. TA FITZGERALD AND THE CHIEF DISCUSSED THIS, STATING THEY DON'T GET WHY THEY HAVE TO EITHER. THE TOWN HAS HIRED FIREFIGHTERS UP TO AGE 42 BUT AROUND 10 YEARS AGO ADOPTED A STANDARD THAT CAPPED THE AGE AT 32. THIS BECAME A BARRIER TO A NUMBER OF CANDIDATES WE WERE LOOKING TO HIRE. THE UNION'S POSITION IS BASED ON CIVIL SERVICE'S CAP OF AGE 32. THIS IS A LOCAL OPTION AND NOT ALL COMMUNITIES HAVE AN AGE CAP. THIS HAS A DISPARITY IMPACT ON FEMALE & MINORITY CANDIDATES. THE CHIEF DOES NOT FEEL THAT THE CIVIL SERVICE TEST IS EQUAL – IF YOU HAVE FRIENDS OR FAMILY WHO ARE FIREFIGHTERS, YOU'RE MORE PREPARED AND UNDERSTAND HOW TO TAKE THE TEST. HE IS CURRENTLY DOING OUTREACH TO LET CANDIDATES KNOW THEY CAN TAKE THE TEST. IF UP TO ME, I WOULD'VE ELIMINATED THE AGE CAP. THERE ARE UNION CONCERNS THAT HIRING OVER AGE 32 WOULD BE RISKY TO THE TOWN. SOMEONE OVER 32 MAY HAVE MORE CHALLENGES AND BE INJURY PRONE. SETTling AT AGE 35 IS AN ISSUE THAT WE DON'T FEEL GREAT ABOUT BUT PART OF COMPROMISE & COLLECTIVE BARGAINING. MS. FLETCHER ALSO WANTS TO MAKE THAT CLEAR THAT THE BOARD HAS FIDUCIARY RESPONSIBILITIES. SHE FEELS THAT THE BOARD LOOKED AT THIS AT THE LAST MINUTE, THAT THEY DIDN'T HAVE A LOT OF TIME TO THINK ABOUT IT MAKING IT HARD FOR HER TO SAY NO (MEMBERSHIP HAD 48 HOURS TO VOTE ON THIS TOO). SHE AGREES WITH MR. GRISHMAN - THE AMOUNT OF ARPA FUNDS BEING USED IS DISTURBING BUT IF ON THE FIRE DEPT. AND READING ABOUT THE MULTIPLE PEOPLE IN TOWN HALL THAT DIDN'T GO INTO PEOPLE'S HOMES AND WERE EXPOSED TO COVID, I'M THINKING WHY AREN'T I GETTING THAT TOO. SHE ALSO ASKED IF THE TOWN WOULD BE PAYING FOR MINIMUM STAFFING GRIEVANCES AGAIN? CHIEF ARCHER – THERE COULD BE STRONGER LANGUAGE IN THIS MOA BUT THE UNION WOULDN'T ACCEPT THAT. THIS LANGUAGE WAS APPROVED BY TOWN COUNSEL, THE TOWN ADMINISTRATOR & MYSELF EVEN THOUGH WE ALL FELT THAT IT HAS BEEN IN THE CONTRACT FOR YEARS, THE UNION DISAGREED. DOESN'T SAY "UNDER NO CIRCUMSTANCES CAN A GRIEVANCE BE FILED". NOTHING IS AN ABSOLUTE AND I HAVE TO ENGAGE WITH THE UNION.
- MR. GRISHMAN: THIS CONTRACT MAKES ME UNCOMFORTABLE AND IS A CONSIDERABLE USE OF ARPA FUNDS THAT WE CAN USE FOR OTHER TOWN NEEDS RATHER THAN TO SETTLE GRIEVANCES. SRF CONFIDENCE IN THE LANGUAGE WE WERE ABLE TO SECURE WILL HELP US MANAGE THE BUDGET, FIND WAYS TO BE CAREFUL & DILIGENT MANAGING TO BUDGET. THE CHIEF UNDERSTANDS THE FIDUCIARY RESPONSIBILITIES WE HAVE.
- MS. PHELAN: ECHOES MR. DUFFY, THIS IS UNCOMFORTABLE BUT NEGOTIATORS WERE IN THE ROOM & HAD THE INFORMATION. SHE FEELS THIS IS THE MOST REASONABLE CONTRACT WE COULD GET IN THIS TIME, UNDER THIS ENVIRONMENT, WITH THESE GRIEVANCES. HOPEFULLY THIS WILL PRODUCE AN OPEN LINE OF COMMUNICATION THAT WE DID NOT HAVE PRIOR TO THIS CONTRACT.
- TA FITZGERALD: WE HAVE SOME RELATIONSHIPS TO MEND. THE TRANSITION OUT OF CIVIL SERVICE HAS BEEN MORE COMPLEX & TOUGHER THAN WE ANTICIPATED. THERE ARE PIECES OF THIS THAT MAKE US FEEL A LITTLE UNCOMFORTABLE BUT GIVES US A

CHANCE TO PUT THE CONFLICT BEHIND US WHICH IS A RELIEF AND HELPS THE DEPT. BUILD A MORE INCLUSIVE WORK FORCE. HE WANTS TO RECOGNIZE THE FIRE DEPT. FOR THAT.

- **MR. SPELLIOS:** APPRECIATES WHAT THE TA AND CHIEF HAVE SAID, DOESN'T ENVY THEM HAVING TO SIT IN THAT ROOM AND APPLAUDS THAT WE'RE SEEING COLAS AS RECOGNITION THAT WE'RE LIVING IN AN INFLATIONARY ENVIRONMENT. HE APPRECIATES THE HAZARDOUS MATERIALS STIPEND AS THE CHIEF HAS SPOKEN NUMEROUS TIMES ABOUT THE HAZARDS THEY FACE; APPRECIATES THEIR ROLE AS DEPUTY HEALTH AGENTS. THIS IS THE MOST GENEROUS CONTRACT IN MY 8 YEARS AND HE IS NOT SURE THE TOWN CAN AFFORD IT OR THE PRECEDENCE IT SETS. HE DOESN'T SUPPORT THIS MOA BECAUSE OF THE SIGNIFICANT AMOUNT TO SETTLE GRIEVANCES, WHICH ARE USUALLY PRIVATE. THE UNION PRESIDENT DECIDED TO PUBLISH ON SOCIAL MEDIA THOSE GRIEVANCES WHICH ARE NOW PART OF A PUBLIC CONTRACT AND ASKS WHY TAXPAYERS ARE BEING ASKED TO PAY MONEY TO SETTLE (TO TURN A PAGE, GET A FRESH START, LABOR HARMONY). DISHARMONY WAS AIRED & INFLAMED BY UNION MANAGEMENT ON SOCIAL MEDIA. ONE GRIEVANCE HAS TO DO WITH OVERTIME DURING THE PANDEMIC EVEN THOUGH 18 MEMBERS WERE OUT SICK. THE UNION IS LOOKING FOR \$100,000 FOR SHIFTS THAT WERE NEVER WORKED. THEY ALSO DISCUSSED IN THE LYNN ITEM A GRIEVANCE ABOUT A PRIVATE TEXT BETWEEN THE CHIEF AND UNION PRESIDENT ABOUT HIS DISAPPOINTMENT IN THE LACK OF FIREFIGHTERS AT A PUBLIC EVENT. THEY WERE ORDERED TO ATTEND BUT STOOD FEET AWAY FROM THE AUDIENCE. I CAN'T SUPPORT THESE PAYMENTS TO THEM AND WILL BE VOTING NO ON THIS CONTRACT.

UPON **MOTION**, DULY MADE BY MARY ELLEN FLETCHER, SECONDED BY KATIE PHELAN, IT WAS **VOTED**: TO RATIFY THE COLLECTIVE BARGAINING AGREEMENT FOR THE FIRE DEPT. IAFF LOCAL 1459 AS PRESENTED: ALL IN FAVOR: FOUR; ANY OPPOSED: ONE (MR. SPELLIOS). MOTION PASSES, 4 TO 1.

- 3. TAX CLASSIFICATION UPDATE:** THIS IS THE ANNUAL UPDATE. THE BOARD OF ASSESSORS UPDATES VALUES OF PROPERTIES IN TOWN. UNDERSTANDING HOW VALUES CHANGE, HELPS US UNDERSTAND HOW THE TAX LEVY IMPACTS OWNERS. WE'VE TRIED TO BALANCE THE IMPACT BY USING THE TOWN'S FREE CASH AND FINANCIAL POSITION TO LEVY OUR TAX RATE. WE DON'T HAVE ALL OF THE DATA TO MAKE A DECISION TONIGHT. WE'RE LOOKING FOR NEW GROWTH AND THE FREE CASH CERTIFICATION FROM DOR. MR. RICHARD SIMMONS, INTERIM TOWN ASSESSOR: ASSESSED VALUES HAVE INCREASED. THIS YEAR'S VALUES ARE AS OF 1/1/22. RESIDENTIAL PROPERTY VALUES HAVE INCREASED 15.9%, DEMAND ON COMMERCIAL PROPERTIES ISN'T AS HIGH AND HAVE INCREASED BY 9.2%. THE RESIDENTIAL BASE IS 93% VS. 7% OF COMMERCIAL. THE AVERAGE SINGLE FAMILY TAX BILL HAS DROPPED FROM 41.24% HIGHER THAN THE AVERAGE ESSEX COUNTY TAX BILL IN 2013 TO 8.18% ABOVE THE AVERAGE IN 2022. THE PEER GROUP HAS SEEN INCREASES OF 39% IN THEIR AVERAGE SINGLE FAMILY TAX BILL VS. SWAMPSCOTT'S 7%. THE COMMERCIAL INCREASE HAS BEEN SIGNIFICANTLY LESS THAN PEER GROUPS, FROM \$17,498 IN 2013 TO \$17,609 IN 2022. WE HAVE TO MAKE VINNIN SQUARE, THE MBTA AREA, MORE VALUABLE AND BRING COMMERCIAL INVESTMENTS BACK SO AS NOT TO CUT INTO THE BUDGET. TA FITZGERALD SUGGESTS HOLDING A LAND USE SUMMIT ANNUALLY TO SHOW PEOPLE WE NEED TO FOCUS ON ECONOMIC DEVELOPMENT. PATRICK LUDDY, TOWN TREASURER/COLLECTOR: THERE ARE FIVE COMPONENTS OF TAX POLICY: SETTING THE TOWN BUDGET, ESTIMATING LOCAL RECEIPTS, SMALL BUSINESS & RESIDENTIAL EXEMPTIONS, USE OF FREE CASH AND RESERVES TO MITIGATE TAX INCREASES AND A SPLIT OF THE TAX RATE. MR. LUDDY DESCRIBED THE DOR TAX RATE RECAP FORM THAT THE TOWN HAS TO COMPLETE WHICH SHOW PROJECTED APPROPRIATIONS, STATE CHARGES (MBTA, CHARTER SCHOOL CHARGES), ESTIMATED REVENUE TO BE RAISED FOR THE FISCAL YEAR, STATE AID (\$6.6M THIS YEAR HAS INCREASED BY \$93,485), LOCAL RECEIPTS HAS TO BE ACCOUNTED FOR (LAST YEAR'S ACTUALS V THIS YEAR'S ESTIMATES ARE REPORTED AND HAVE TO BE JUSTIFIED TO DOR), OTHER FUNDS, INCLUDING USE OF FREE CASH AND/OR RESERVES HAS TO BE SHOWN. THE TOTAL APPROPRIATIONS AND CHARGES IS REMOVED WHICH GIVES US THE LEVY. FINANCIAL POLICY REQUIRES 3-5% OF THE OPERATING BUDGET KEPT IN FREE CASH (\$2.040 - \$3.4M). IN ADDITION, WE HAVE SIGNIFICANT FINANCIAL RESERVES THAT HAVE BEEN BUILT UP OVER THE LAST SEVEN YEARS. FINANCIAL POLICY REQUIRES THE TOWN MAINTAINS 9-10% OF THE OPERATING BUDGET IN THE GENERAL STABILIZATION FUND AND 2-4% IN THE CAPITAL STABILIZATION FUND. BETWEEN BOTH, THE TOWN CURRENTLY HAS 12.9% OF THE ANNUAL OPERATING BUDGET RESERVED, CURRENTLY \$7.135M. S&P HAS CONTINUOUSLY POINTED THIS OUT AS A CREDIT POSITIVE. THESE ARE AVAILABLE TO FURTHER REDUCE THE TAX RATE AS THE BOARD SEES FIT. THE FINANCE TEAM HAS DEVELOPED A 10 YEAR SUMMARY OF FORECASTED REVENUES AND EXPENDITURES TO HELP DEVELOP OUR FUTURE AND MAKE DECISIONS. REVENUE ESTIMATES ARE PURPOSELY CONSERVATIVE. AS SOON AS WE GET NEW GROWTH AND THE FREE CASH CERTIFICATION, WE CAN USE THIS INFORMATION TO BALANCE THE TAX LEVY. MONEY FROM FREE CASH &/OR THE STABILIZATION FUND CAN BE APPROPRIATED TO OFF SET THE DEBT SERVICE FOR THE NEW SCHOOL AND TAX LEVY. AFTER THE SPECIAL TOWN MEETING ON DECEMBER 5TH, THE SELECT BOARD WILL SET THE TAX RATE FOR 2023.

4. **SPECIAL TOWN MEETING WARRANT:**

- i. **ARTICLE 1 – AMEND APPROPRIATION FY23 OPERATING BUDGET:** VOTED FAVORABLE ACTION ALREADY
- ii. **ARTICLE 2 – APPROVE TRANSFER OF FREE CASH &/OR STABILIZATION:** NO ACTION TAKEN UNTIL FREE CASH HAS BEEN CERTIFIED.
- iii. **ARTICLES 3 & 4 – APPROVE TRANSFER OF FREE CASH FOR CBAs/ESTABLISH A COMPENSATED ABSENCES RESERVE FUND:** NO ACTION TAKEN UNTIL FREE CASH HAS BEEN CERTIFIED.
- iv. **ARTICLE 5 – GENERAL BYLAWS – REVOLVING FUNDS:** IF TOWN MEETING APPROVES RAISING THE RECREATION REVOLVING ACCOUNT FISCAL YEAR SPENDING LIMIT FROM \$300,000 TO \$500,000, THEN THE FUNDING FOR SAILBOATS AND SUP EQUIPMENT WILL BE TAKEN OUT OF ARTICLE 6.
- v. **ARTICLE 6 – APPROPRIATION FOR RECOMMENDED CAPITAL PROJECTS:** THE FINANCE COMMITTEE MAY RECOMMEND CHANGING THE FUNDING SOURCE FOR SAILBOATS/SUPS TO THE RECREATION REVOLVING FUND. MS. SARRO STATED THAT THE REC REVOLVING ACCOUNT IS SIGNIFICANTLY HIGHER THAN ITS USUAL AVERAGE OF \$140,000 AND THAT MS. STRAUSS AGREES WE SHOULD USE THAT ACCT FOR THESE PURPOSES. WHEN ASKED WHAT THE AMOUNT IS, MS. SARRO SAID \$288,000. MR. GRISHMAN ASKED WHY IT IS SO MUCH HIGHER THAN USUAL. SHE REPLIED THAT IT IS USUALLY \$140,000 SO WHEN SHE WENT BACK AND LOOKED AFTER THE PREVIOUS MEETING, IT IS AT \$288,000. THE RECREATION DIRECTOR DIDN'T KNOW IT WAS THAT HIGH EITHER. MR. SPELLIOS BELIEVES THERE WILL BE EXPENSES THAT SHOULDN'T COME OUT OF REC REVOLVING. THERE WAS A DISCUSSION ABOUT THE RECREATION REVOLVING ACCOUNT. MS. FLETCHER DOES NOT FEEL IT IS TRANSPARENT. MR. SPELLIOS BELIEVES RECREATION IS A CORE SERVICE OF THE TOWN AND THEY CAN'T AFFORD ALL OF THE EQUIPMENT ON THEIR OWN. MR. GRISHMAN WOULD LIKE TO SEE THE RECREATION DIRECTOR'S SALARY AS A LINE ITEM IN THE GENERAL FUND, BELIEVING THAT THE COST OF PROGRAMMING, FOR ALL AGE GROUPS, WOULD DECLINE. TA FITZGERALD STATED THAT IF THIS IS WHAT THE BOARD WANTS, I'M HAPPY TO PUT IT FORTH. MS. FLETCHER DOES NOT AGREE THAT THE REC DIRECTOR'S PAYROLL SHOULD BE IN THE GENERAL BUDGET. MS. SARRO COMMENTED THAT OTHER COMMUNITIES HAVE A 50/50 SPLIT. MS. PHELAN WOULD LIKE MORE COMMUNICATION AS TO HOW SCHOLARSHIPS WORK. THERE IS A LOT OF PROGRAMMING BUT NOT A LOT OF INFORMATION FOR HOW PEOPLE GO ABOUT GETTING PROGRAMMING SUBSIDIZED.

UPON **MOTION**, DULY MADE BY PETER SPELLIOS, SECONDED BY KATIE PHELAN, IT WAS UNANIMOUSLY **VOTED**: TO CHANGE THE SOURCE OF FUNDING IN ARTICLE 5 FOR NEW SAILBOATS & SUP EQUIPMENT TO THE RECREATION REVOLVING ACCOUNT: ALL IN FAVOR: YES. ANY OPPOSED: NO. MOTION PASSES

- vi. **ARTICLE 7 – APPROPRIATION FOR NEW ELEMENTARY SCHOOL:** THIS IS SPONSORED BY THE SELECT BOARD BUT THE FINANCE COMMITTEE WILL MAKE THE MOTION. MR. SPELLIOS WANTS TO DEFER TO SUZANNE WRIGHT, ERIC SCHNEIDER WILL MAKE THE MOTION.
 - vii. **ARTICLE 8 - SUPREME COURT:** THIS IS SPONSORED BY THE PLANNING BOARD. MR. SPELLIOS STATED THAT THE BOARD NEEDS TO EXPLAIN HOW NORMAL THE ACCEPTANCE OF PUBLIC WAYS ARE. THERE ARE STILL MANY STREETS IN TOWN THAT WERE INTENDED TO BE ACCEPTED BUT HAVE NOT BEEN AND ARE STILL SHOWING AS PRIVATE WAYS. TA FITZGERALD HAS SPOKEN TO MR. KANE, HIS BACKGROUND AS A COMMUNITY DEVELOPMENT PLANNER CAN HELP.
 - viii. **ARTICLES 9 & 10 – ACCEPTANCE OF DONATED LAND (PARK SQUARE AND LAND OFF OF CUSHING AVENUE):** THIS IS SPONSORED BY THE SELECT BOARD AND IS PRETTY STRAIGHTFORWARD. MR. SPELLIOS OR MR. DUFFY WILL SPEAK TO THIS.
5. **COMMITTEE APPOINTMENTS:** WE HAVE APPOINTMENTS FOR TWO COMMITTEES: TREE COMMITTEE, ROBERT LEVY, FOR A 3-YEAR TERM BY TA FITZGERALD, ROBERT HAS A PASSION FOR SUSTAINABILITY. MR. LEVY STATED THAT HE IS INTERESTED IN THE NATURAL ENVIRONMENT OF THE TOWN AND IS LOOKING FORWARD TO SERVING ON THIS COMMITTEE.

UPON **MOTION**, DULY MADE BY DAVID GRISHMAN, SECONDED BY MARY ELLEN FLETCHER, IS WAS UNANIMOUSLY **VOTED** TO: APPOINT ROBERT LEVY TO THE TREE COMMITTEE FOR A THREE-YEAR TERM, EXPIRING ON APRIL 5, 2025: ALL IN FAVOR: YES. ANY OPPOSED: NO. MOTION PASSES.

WAR MEMORIAL SCHOLARSHIP COMM: MARTHA BRINE, DOUGLAS MAITLAND, DUNCAN MAITLAND. THE MAITLANDS ARE HAPPY TO BE A PART OF THE COMMITTEE, LIFELONG RESIDENTS. TA FITZGERALD IS HAPPY TO APPOINT THEM.

UPON **MOTION**, DULY MADE BY DAVID GRISHMAN, SECONDED BY MARY ELLEN FLETCHER, IT WAS UNANIMOUSLY **VOTED**: TO APPOINT MARTHA BRINE, DUNCAN MAITLAND AND DOUGLAS MAITLAND TO THE WAR MEMORIAL SCHOLARSHIP FUND FOR TERMS OF THREE YEARS, EXPIRING ON 6/30/25: ALL IN FAVOR: YES. ANY OPPOSED: NO. MOTION PASSES.

6. **DEBT EXCLUSION**: THE SELECT BOARD HAS TO APPROVE THE REPORT. PER MR. SPELLIOS, THE OPM ACCURATELY DESCRIBES THE SITUATION IN THE REPORT.

UPON **MOTION**, DULY MADE BY PETER SPELLIOS, SECONDED BY DAVID GRISHMAN, IT WAS UNANIMOUSLY **VOTED**: TO ACCEPT THE OPM'S REPORT AND AUTHORIZE THE FILING OF THE DE-2 FORM: ALL IN FAVOR: YES. ANY OPPOSED: NO. MOTION PASSES.

C. VOTES OF THE BOARD:

1. APPROVAL OF THE CONSENT AGENDA:

- i. REGULAR MEETING MINUTES OF 11/16/22

UPON **MOTION**, DULY MADE BY PETER SPELLIOS, SECONDED BY KATIE PHELAN, IT WAS UNANIMOUSLY **VOTED** TO: APPROVE THE CONSENT AGENDA (MINUTES OF 11/16/22) AS PRESENTED: ALL IN FAVOR: YES. ANY OPPOSED: NO. MOTION PASSES.

D. TOWN ADMINISTRATOR'S REPORT (READ REPORT):

1. **ASSESSOR**: LAST WEEK THE BOARD OF ASSESSORS SET THE NEW GROWTH NUMBER FOR THE TOWN. SWAMPSCOTT WILL SEE AN INCREASE IN BOTH THE MEDIAN AND AVERAGE SINGLE-FAMILY PROPERTY THIS YEAR AND ARE STILL WAITING FOR FREE CASH CERTIFICATION.
2. **BUILDING DEPT**: THE BUILDING DEPT HAS ISSUED 1,373 PERMITS SINCE 1/1/22 & HAS COLLECTED \$881,833 IN PERMIT FEES. THERE HAS BEEN A SIGNIFICANT UPTICK IN ACTIVITY DUE TO A NUMBER OF LARGE RESIDENTIAL DEVELOPMENTS AND THE CONSTRUCTION OF THE NEW ELEMENTARY SCHOOL.
3. **SENIOR CENTER**: WE ARE EAGER TO SEE THE COMMUNITY CARES DEPT. ADVANCE. THE NEW SENIOR CENTER'S WEBSITE HAS GONE LIVE: WWW.ACTIVEAGINGSWAMPSCOTT.COM.
4. **RECREATION**: THE ANNUAL INDOOR FARMERS MARKET & TURKEY HUNT WERE A SUCCESS. UPCOMING IS THE ANNUAL GINGERBREAD HOUSE CONTEST, BREAKFAST WITH SANTA, THE HOLIDAY FESTIVAL AND FIRST NIGHT.
5. **VETERANS**: MIKE SWEENEY, HIS WIFE AND I PASSED OUT HOLIDAY MEALS FOR SWAMPSCOTT & LYNN VETERANS LAST WEEK. MIKE IS STILL TAKING ORDER FROM ANYONE INTERESTED IN BUYING A WREATH FOR A VETERAN'S GRAVE. LASTLY, THE GOLD STAR MEMORIAL FOR JARROD RAYMOND IS SUNDAY, DECEMBER 4TH.
6. **DPW**: DPW HAS THREE NEW TEAM MEMBERS (RYAN SQUIRES, BRIAN MARTIN & KEVIN McDONALD) WHO HAVE BEEN HARD AT WORK FINISHING STREET LINE PAINTING, PLANTINGS AT THE NEW BUS STOP AND INSTALLATION OF A NEW STOCKADE FENCE AT THE FISH HOUSE.

E. SELECT BOARD TIME

MR. DUFFY: NOTHING TO ADD.

MS. FLETCHER: 1.) WE DISCUSSED AGGREGATE COMPLAINTS A FEW WEEKS AGO — ARE THERE ANY UPDATES? TA FITZGERALD MET WITH STAFF, LOOKED AT SEE-CLICK-FIX AND ARE UPDATING THE MENU FOR COMPLAINTS. PER CHIEF ARCHER, IF A RESIDENT COMPLAINS, THEY ARE NO LONGER GOING TO BE SENT TO SALEM FIRE. WE'RE GOING TO GET INFORMATION OUT IN OUR NEWSLETTER REGULARLY NOTIFYING RESIDENTS HOW TO COMPLAIN. THEY CAN CALL THE FIRE DEPT. OR USE THE TOWN'S WEBSITE. THERE WAS A BRIEF DISCUSSION ON HOW TO NOTIFY RESIDENTS, INCLUDING DROPPING FLYERS. WE WILL LOOK FURTHER INTO HOW TO NOTIFY RESIDENTS OF HOW TO SUBMIT A BLASTING COMPLAINT. 2.) THANKED SWAMPSCOTT TV FOR THEIR HARD WORK.

MR. GRISHMAN: 1.) THE VFW POST 1240 AUXILIARY IS HOSTING A BLOOD DRIVE WITH THE AMERICAN RED CROSS ON FRIDAY, 12/9, AT THE ITALIAN CLUB, FROM 1-6. EVERY PERSON WHO BRINGS A FRIEND IS AUTOMATICALLY ENTERED INTO A RAFFLE TO WIN CELTICS TICKETS; 2.) SHOUT OUT TO THE LIBRARY. THERE'S BEEN A TON OF GREAT PROGRAMMING. BIG THANK YOU TO THE NEW DIRECTOR, JONATHAN NICHOLS.

Ms. PHELAN: 1.) WE TALKED ABOUT THE REC DEPT & THEIR PROGRAMMING. MY FAMILY LOVES THE ANNUAL TURKEY HUNT. HOPEFULLY WE CAN HELP MORE PEOPLE PARTICIPATE EVEN IF THEY CAN'T AFFORD IT. PEOPLE DON'T WANT TO ASK FOR HELP. TA FITZGERALD WOULD LIKE TO HAVE MORE CONVERSATIONS ABOUT THIS.

Mr. SPELLIOS: NOTHING TO ADD.

UPON **MOTION**, DULY MADE BY DAVID GRISHMAN, SECONDED BY MARY ELLEN FLETCHER, IT WAS UNANIMOUSLY **VOTED** TO: ADJOURN AT 8:55 P.M.: ALL IN FAVOR: YES. ANY OPPOSED: NO. **MOTION PASSES.**

TRUE ATTEST,

Dianne Marchese

DIANNE MARCHESE, ADMINISTRATIVE ASSISTANT TO THE TOWN ADMINISTRATOR & SELECT BOARD

APPROVED BY THE SELECT BOARD 12/7/22

ATTACHMENTS:

TELL US YOUR STORY PROJECT
CBA PRESENTATION
TAX CLASSIFICATION PRESENTATION
SPECIAL TOWN MEETING WARRANT
DE2 LETTER/FORM
COMMITTEE APPOINTMENTS
TOWN ADMINISTRATOR'S REPORT

Swampscott Unites Respects and Embraces Diversity (S.U.R.E) Tell Us Your Story – “Coming to America”

This **S**wampscott **U**nites **R**espects and **E**mbraces Diversity (S.U.R.E) project aims to celebrate and to spotlight the diversity of people in Swampscott.

S.U.R.E is a volunteer community group aimed at celebrating all aspects of diversity. Its purpose is to:

- promote an understanding of Diversity;
- provide fun and educational opportunities to explore and experience Diversity;
- assist the community in developing cultural competency skills;
- engender a welcoming, nurturing, respectful and inclusive Swampscott community; and
- be allies to those in our community who are facing prejudice of any kind.

=====

Sharing our stories is a key way of getting to know each other. We are soliciting stories from Swampscott residents about their family’s “Coming to America”.

Who came? From Where? When? How? Why? What does it mean to you?

Please include a relevant photograph – whether it’s a photo of your ancestors or a current family photo – to complement the story. Selected stories will be shared at S.U.R.E. Diversity events and archived at the Swampscott Public Library.

The education and fun of this project hinges on public participation. So, do help us in celebrating our community! Most importantly, keep responses to 200 words and send a photo (identifying the people in it) with the story to info@surediversity.org

Let us know if you need help. We’ll gladly provide guidance in telling your story.

For more information, contact info@surediversity.org

(over)

Swampscott Unites Respects and Embraces Diversity (S.U.R.E)
Tell Us Your Story – “Coming to America”

Name / Contact _____

Email _____

Phone _____

Please share your story: Who came? When? From Where? How?
Why? What does it mean to you?

Here's an example.

=====C U R R Y=====

I have not done genealogical research; but I have listened to family stories. My heritage is Irish, famine Irish. I understood my grandparents and great grandparents were born here in the 1800's. But a new story I just heard is my maternal great grandfather walked to Boston from Canada with a wheelbarrow. He bartered farm work along the way for meals and a place to sleep at night. He met his wife, an Irish immigrant, in Boston.

My mother, Frances (nee Barry) Curry was raised in Dorchester. Her father, Harry Barry, worked for himself, metalsmithing. He mostly did work for the Navy in tin, but worked with all metals. My mother's baby shoes from 1923 are bronzed and now serve as treasured bookends.

My grandfather's shop was in Scollay Square, once a very vibrant area of town, with hotels, vaudeville shows and all sorts of shops. The business was shuttered in the 1960's when Scollay Square was demolished and bricked over for the new Boston City Hall at Government Center.

My grandmother, Marie Cecelia (nee Fitzgerald) Barry, loved to cook. This spring I found and then framed her delicious recipe for pickled carrots in her own, perfect, parochial school penmanship.

Photo: Martha's Grandfather, Harry Barry (circa 1908)



UPDATE:

Town of Swampscott Collective Bargaining Contracts

11.27.2022

A vertical strip on the left side of the page features several paper boats. One is bright orange, and the others are white. They are arranged in a diagonal line from the top left towards the bottom right.

2022 Collective Bargaining Agreements

DEPARTMENT OF PUBLIC WORKS

ADMINISTRATIVE PROFESSIONALS

LIBRARY

POLICE DEPARTMENT

DPW

07.01.2020-06.30.2023

AFSCME Council 93, Local 2610

- ❖ 16 Full-Time Members
- ❖ COLA - 3%, 2%, 2.5% - \$97,630 cost
- ❖ Increased Stipends for D-2 License, Added Stipends for D-1 and Class A - \$3,745/year
- ❖ \$2,500 bonus upon ratification - \$40,000 cost
- ❖ Management Rights & Major Enhancements:
 - ❖ Automated Time Clocks
 - ❖ GPS devices in all Town vehicles

Admin

07.01.2021-06.30.2024

AFSCME Council 93, Local 2610

- ❖ 6 Members (5 Full-Time, 1 Part-Time)
- ❖ COLA - 2%, 2%, 2% - \$18,000 cost
- ❖ Added Stipend for Notary Public - \$400/person annually - \$800/year cost
- ❖ Improved Wage Table for annual Steps & Improved Longevity Table
- ❖ \$1,500 bonus upon ratification, \$1,000 bonus on July 1, 2022 - \$15,000 cost
- ❖ Management Rights & Major Enhancements:
 - ❖ Elimination of Sick Incentives - \$12,000 savings
 - ❖ Elimination of Personal Day Incentives - \$7,500 savings
 - ❖ Elimination of automatic 7.5 hour holidays - \$3,000 savings
 - ❖ Elimination of 4th personal day - \$3,000 savings

Library

SEIU Local 888

07.01.2022-06.30.2025

- ❖ 16 Members (4 Full-Time, 12 Part-Time)
- ❖ COLA – 2%, 2%, 2% – \$47,000 cost
- ❖ Added Stipend for Notary Public – \$400/person annually – \$800/year cost
- ❖ Improved Wage Table for annual Steps, Added 2 additional steps, & Improved Longevity Table
- ❖ \$750 bonus upon ratification & on July 1, 2022 – \$24,000 cost
- ❖ Management Rights & Major Enhancements:
 - ❖ Elimination of Sick Incentives – \$16,000 savings
 - ❖ Elimination of 4th personal day – \$8,000 savings
 - ❖ All members following same vacation and longevity schedule

Police Dept

07.01.2022-06.30.2025

Massachusetts Coalition of Police, Local 417

- ❖ 33 Full-Time Members (3 current vacancies)
- ❖ COLA - 2.75%, 2.5%, 2.5% - **\$252,575** cost
- ❖ Added Annual Stipend for Body Cameras - \$1,000/member - **\$33,000/year** cost
- ❖ One-Time Bonus for Non-Union Position - \$500/member - **\$16,500** cost
- ❖ Pandemic Response Bonus - \$1,500/member - **\$49,500** cost
- ❖ Improved Stipend Pay to minimum of \$1,200 - **\$5,300** cost
- ❖ Increased "Baby Quinn" - **\$5,700** cost
 - ❖ Associates \$2,750 > \$2,900
 - ❖ Bachelors \$5,750 > \$5,950
 - ❖ Masters \$6,750 > \$7,000
- ❖ Management Rights & Major Enhancements:
 - ❖ Implement Performance Evaluation System
 - ❖ Create a Non-Union Deputy Chief position
 - ❖ All members following same vacation and longevity schedule

Fire Dept IAFF, Local 1459

07.01.2022-06.30.2025

❖ 32 Full-Time Members (0 current vacancies)

❖ COLA - 2.75%, 2.5%, 2.5%

❖ The Town will provide all bargaining unit members employed between March 17, 2020 and November 9, 2022, a one-time payment of \$4500 not to be included in the base wage in recognition of and in consideration for the Fire Fighters extraordinary service to the citizens of Swampscott during the complexities of the pandemic, all of the provisions set forth in this Agreement, and to settle the overtime staffing cases and additional ULP complaints referenced in Section 4 of this MOA.

❖ One Time Pandemic Response–Health Agent - \$500/member

❖ Effective January 2023, the Town will provide an annual Hazardous Materials Stipend of \$1,000. Effective January 2024, this stipend will be increased by \$500.

❖ Effective July 1st, 2022, Juneteenth will be recognized as a paid holiday for all bargaining unit members.

Management Rights & Major Enhancements:

❖ Withdraw all pending matters on staffing and hiring, including:

❖ Staffing ULP (MUP-21-8422) and Hiring ULP (MUP-22-9258) with prejudice and Winter Staffing Grievances (GO-18-2020 (12/22/20) and GO 01-2022 (3/4/22)) and arbitration (as AAA Case No. 01-21-0004-7550) with prejudice.

❖ Strengthened Language for Staffing

❖ Create a Non-Union Administrative Clerk position



Previous Funding

- Free Cash

- Appropriated \$55,710.05 at STM 12/31/2021 for Admin & DPW Unions for FY2021 & FY2022 retro payments
- Use of \$55,418 of Certified Free Cash

- ARPA

- Use of \$310,645 of available ARPA funding for public safety and union members that were working with the public throughout the pandemic
- Of the \$4,572,677 in ARPA funding, we can utilize the standard allowance to make this funding available for general government needs

- Salary Reserve

- \$93,810 of appropriated Salary Reserve in FY2023 budget to cover a portion of the contract costs



Funding – STM 12.2002

- Free Cash

- Use of \$59,965 of Certified Free Cash

- ARPA

- Use of \$223,000 of available ARPA funding for public safety union members that were working with the public throughout the pandemic
 - Same use as for Public Safety Unions at Annual Town Meeting

- Salary Reserve

- \$32,747 of appropriated Salary Reserve in FY2023 budget to cover a portion of the contract costs

A photograph of a white gazebo in a park. The gazebo has a green roof and white columns. It is surrounded by trees with green and yellow leaves, suggesting autumn. There are two wooden benches with black metal frames in the foreground. The ground is covered with fallen leaves. The text is overlaid on the image.

TOWN OF SWAMPSCOTT
Select Board

FISCAL YEAR 2023

PRELIMINARY REVIEW OF
Tax Classification

A. Values and Changes, yearly trends, comparisons

B. Budget Review

C. Review Next Steps

PROCESS

Board of Assessors Determines the Assessed Values

The Assessing Department is also responsible for determining New Growth

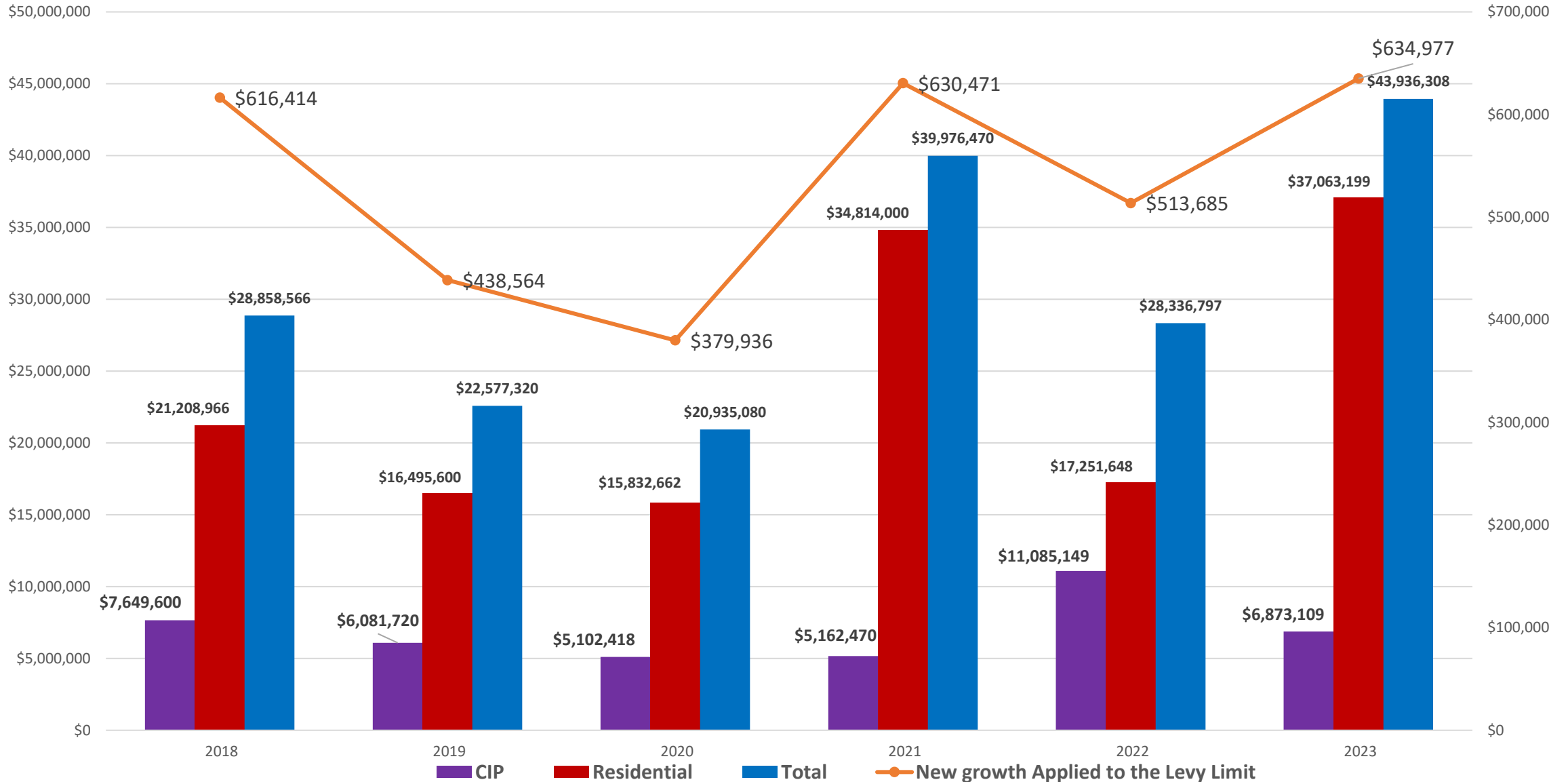
New Growth and the budget all play into determining the levy.

The Assessed Values allocate the taxes to each individual taxable property in Swampscott.

The Select Board, at their discretion, can allocate a portion of the levy off of residential properties and on to commercial, industrial and personal property by classifying the tax rate.

The Select Board also has the option of allocating taxes within the residential levy and the commercial levy by granting the Residential Exemption and the Small Commercial Exemption.

New Growth, Swampscott 2018-2023

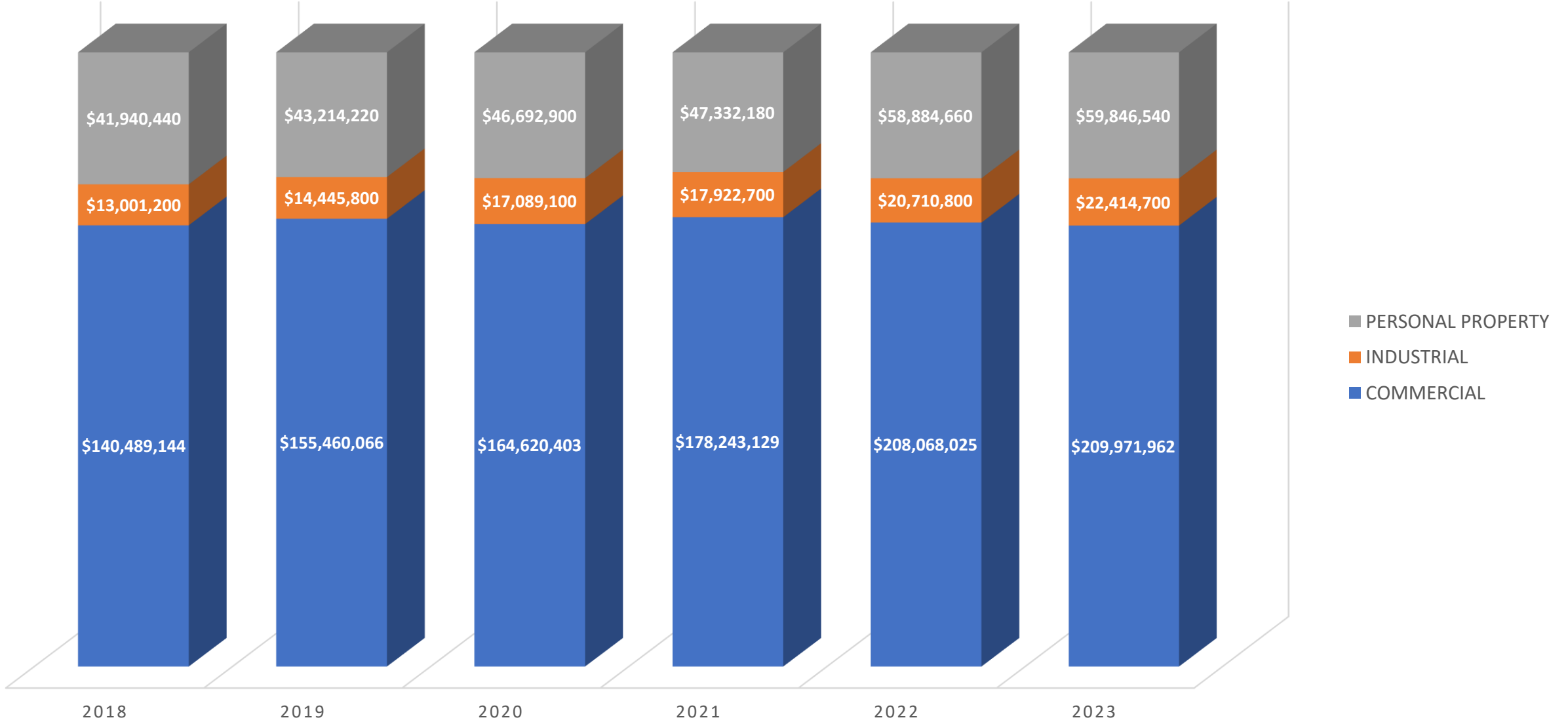


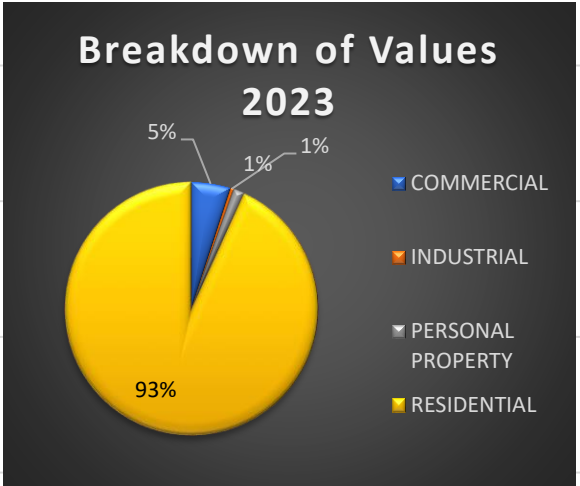
FY2023 Certification of Values Comparing 2022 to 2023

Property Type	Description	FY 2022 Parcel Count	FY2022 Assessed Value	FY2023 Parcel Count	FY2023 Assessed Value	Parcel Diff.	Parcel % Diff.	Assessed Value Diff.	Assessed Value % Diff.
101	Single Family	3,465	\$2,465,274,700	3,467	\$2,856,731,400	2	0.1%	\$391,456,700	15.9%
102	Condominiums	1,185	\$510,283,100	1,206	\$617,055,700	21	1.7%	\$106,772,600	20.9%
MISC 103,109	Miscellaneous Residential	11	\$8,521,700	12	\$10,790,300	1	8.3%	\$2,268,600	26.6%
104	Two-Family	414	\$270,636,800	411	\$295,453,100	-3	-0.7%	\$24,816,300	9.2%
105	Three-Family	52	\$40,849,000	52	\$44,807,500	0		\$3,958,500	9.7%
111-125	Apartments	19	\$152,599,400	18	\$146,119,800	-1	-5.6%	-\$6,479,600	-4.2%
130-32, 106	Vacant/Accessory Land	205	\$23,437,800	204	\$25,706,600	-1	-0.5%	\$2,268,800	9.7%
300-393	Commercial	94	\$195,902,500	89	\$193,871,300	-5	-5.6%	-\$2,031,200	-1.0%
400-442	Industrial	26	\$20,710,800	26	\$22,414,700	0		\$1,703,900	8.2%
CH 61B LAND	Recreational	0	\$0	5	\$2,361,713	5	100.0%	\$2,361,713	
012-043	Multi-use - Residential	38	\$14,162,495	38	\$15,816,401	0		\$1,653,906	11.7%
012-043	Multi-use - Commercial	0	\$12,165,525		\$13,738,949	0		\$1,573,424	12.9%
501	Individuals/Partnerships	201	\$2,699,730	208	\$3,294,090	7	3.4%	\$594,360	22.0%
502	Corporations	130	\$4,547,910	130	\$4,657,210	0		\$109,300	2.4%
503	Manufacturing	2	\$33,120	2	\$33,120	0		\$0	
504	Public Utilities	2	\$35,785,920	2	\$35,785,920	0		\$0	
505	Centrally Valued Telephone	3	\$3,322,900	4	\$3,286,200	1	25.0%	-\$36,700	-1.1%
506	Centrally Valued Pipelines	1	\$11,320,900	1	\$11,272,600	0		-\$48,300	-0.4%
508	Wireless Telephone	4	\$1,174,180	4	\$1,517,400	0		\$343,220	29.2%
EXEMPT VALUE	Exempt Property	124	\$166,465,050	124		0		-\$166,465,050	-100.0%
Total Class 1	TOTAL RESIDENTIAL	5,389	3,485,764,995	5,408	4,012,480,801	19	0.4%	\$526,715,806	15.1%
Total Class 3	TOTAL COMMERCIAL	94	208,068,025	89	209,971,962	-5	-5.6%	\$1,903,937	0.9%
Total Class 4	TOTAL INDUSTRIAL	26	20,710,800	26	22,414,700	0		\$1,703,900	8.2%
Total Class 5	TOTAL PERSONAL PROPERTY	343	58,884,660	351	59,846,540	8	2.3%	\$961,880	1.6%
Total Taxable		5,852	3,773,428,480	5,879	4,304,714,003	27	0.5%	\$531,285,523	14.1%

50%
Increase
from 2018

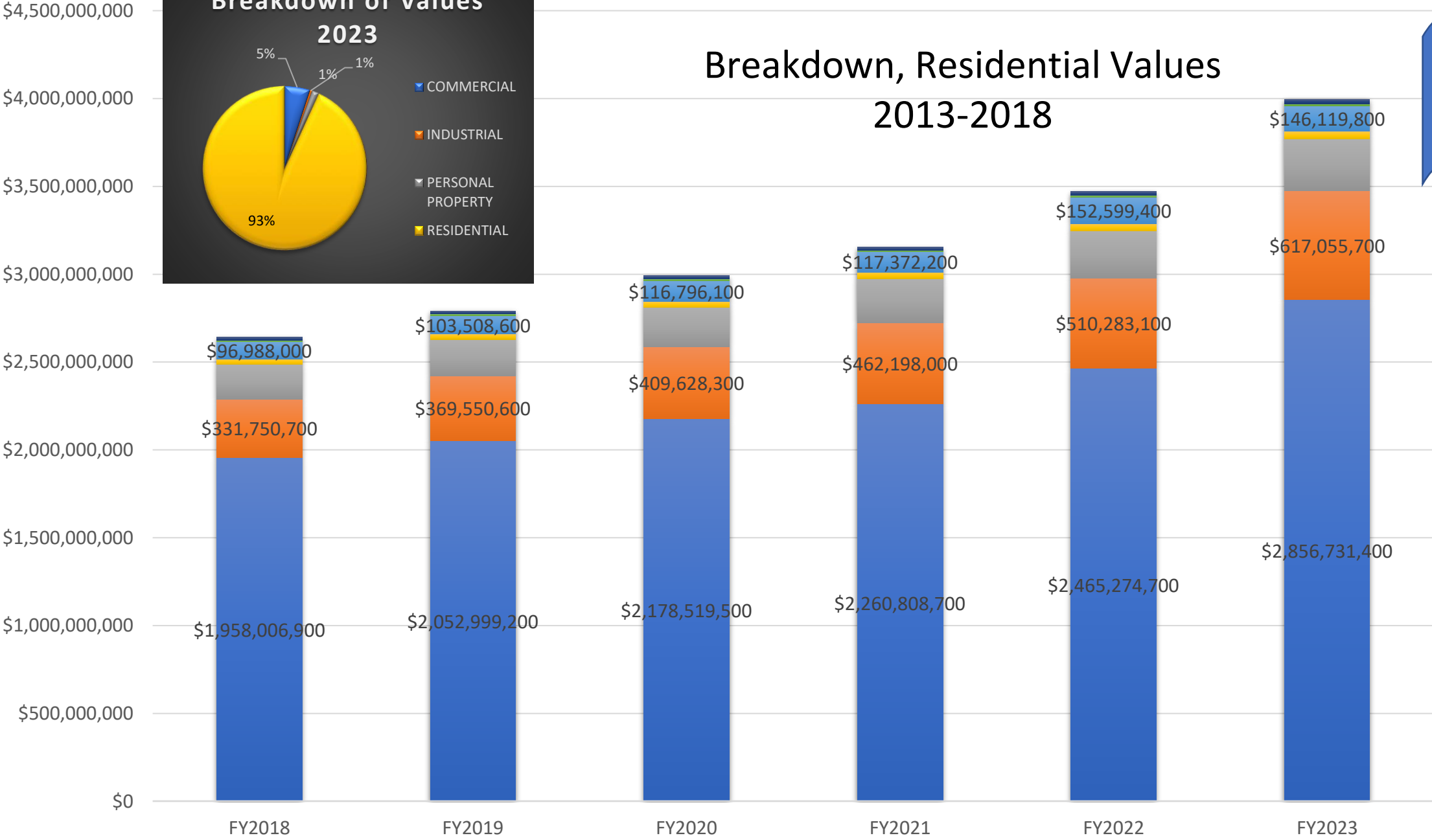
Commercial, Industrial, and Personal Property 2018-2023





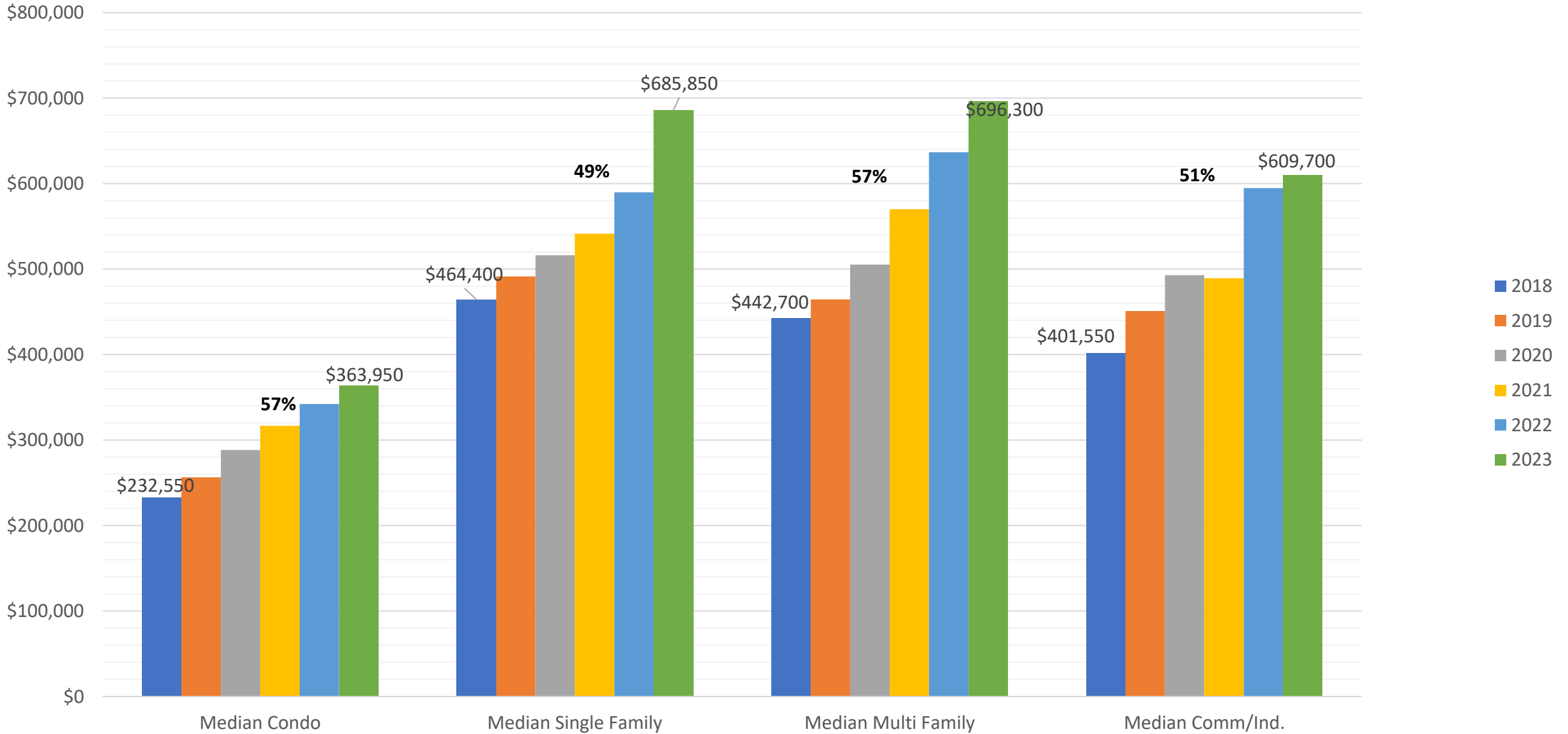
Breakdown, Residential Values 2013-2018

Total Residential
+53%
Since 2018

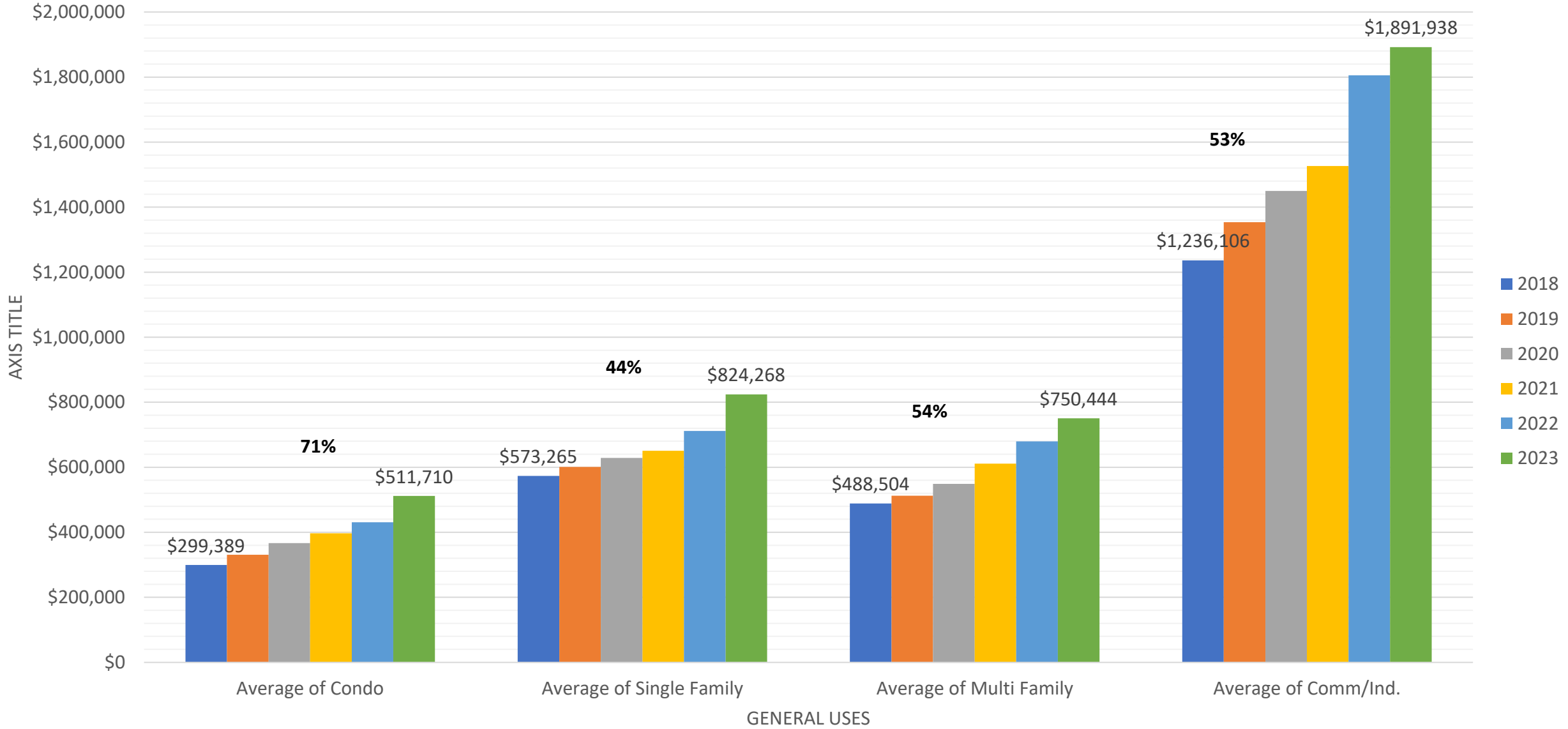


- Vacant Land
- Misc. Res.
- Apartment
- 3 Family
- 2 Family
- Condos
- 1 Family

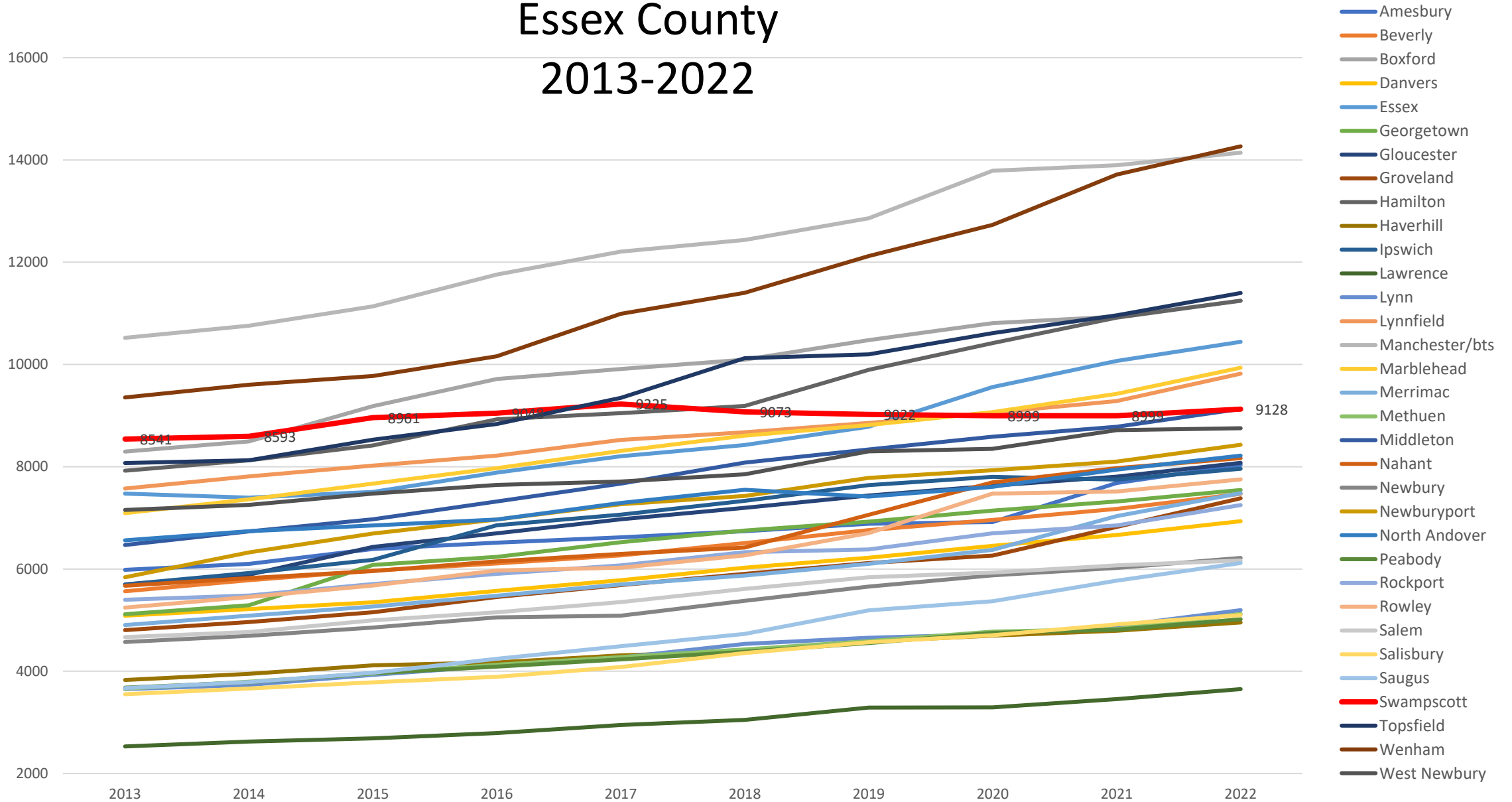
Median Assessments 2018-2023



Average Assessed Values 2018-2023



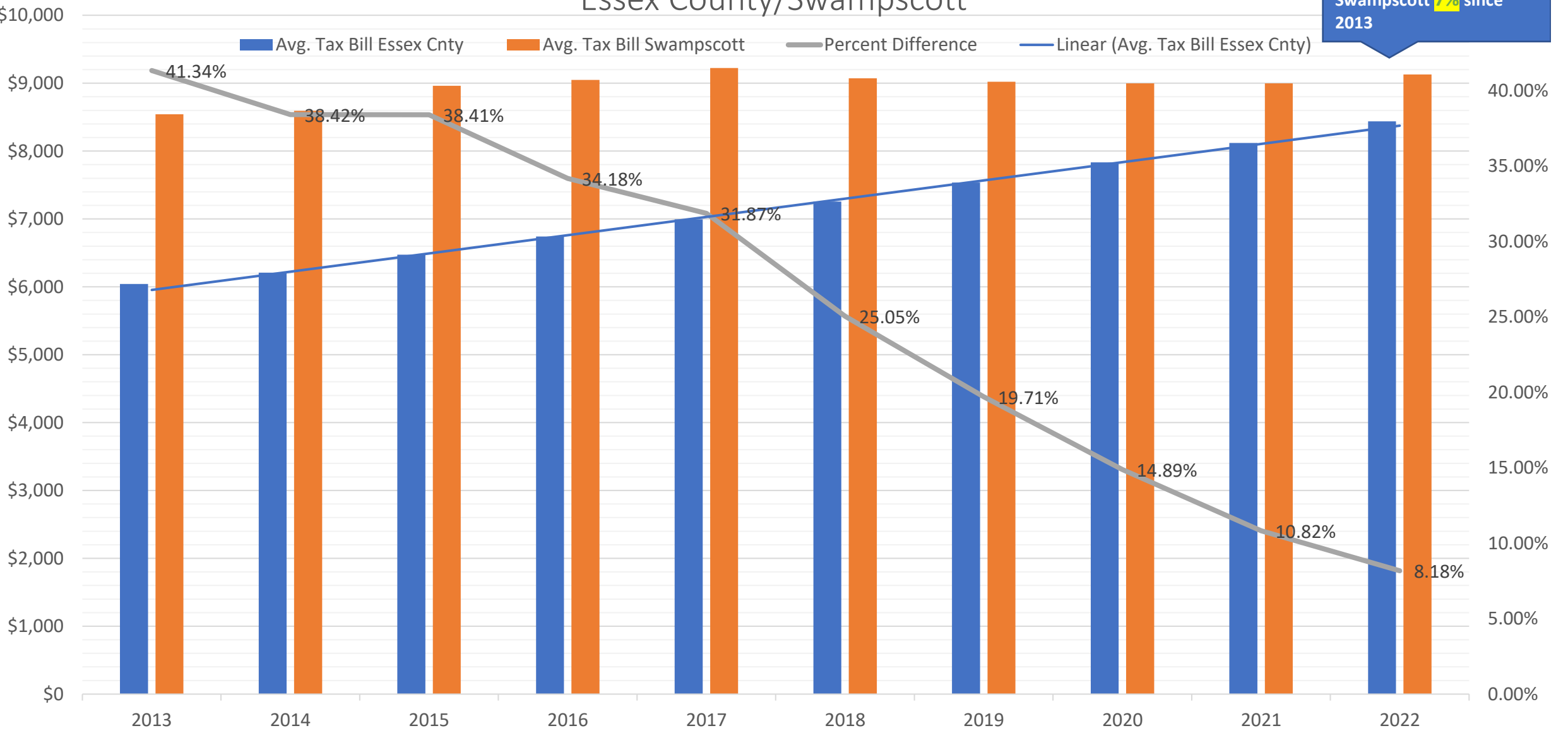
Average Residential Tax Bills for Essex County 2013-2022



Average Single Family Tax Bill 2013 - 2022

Essex County/Swampscott

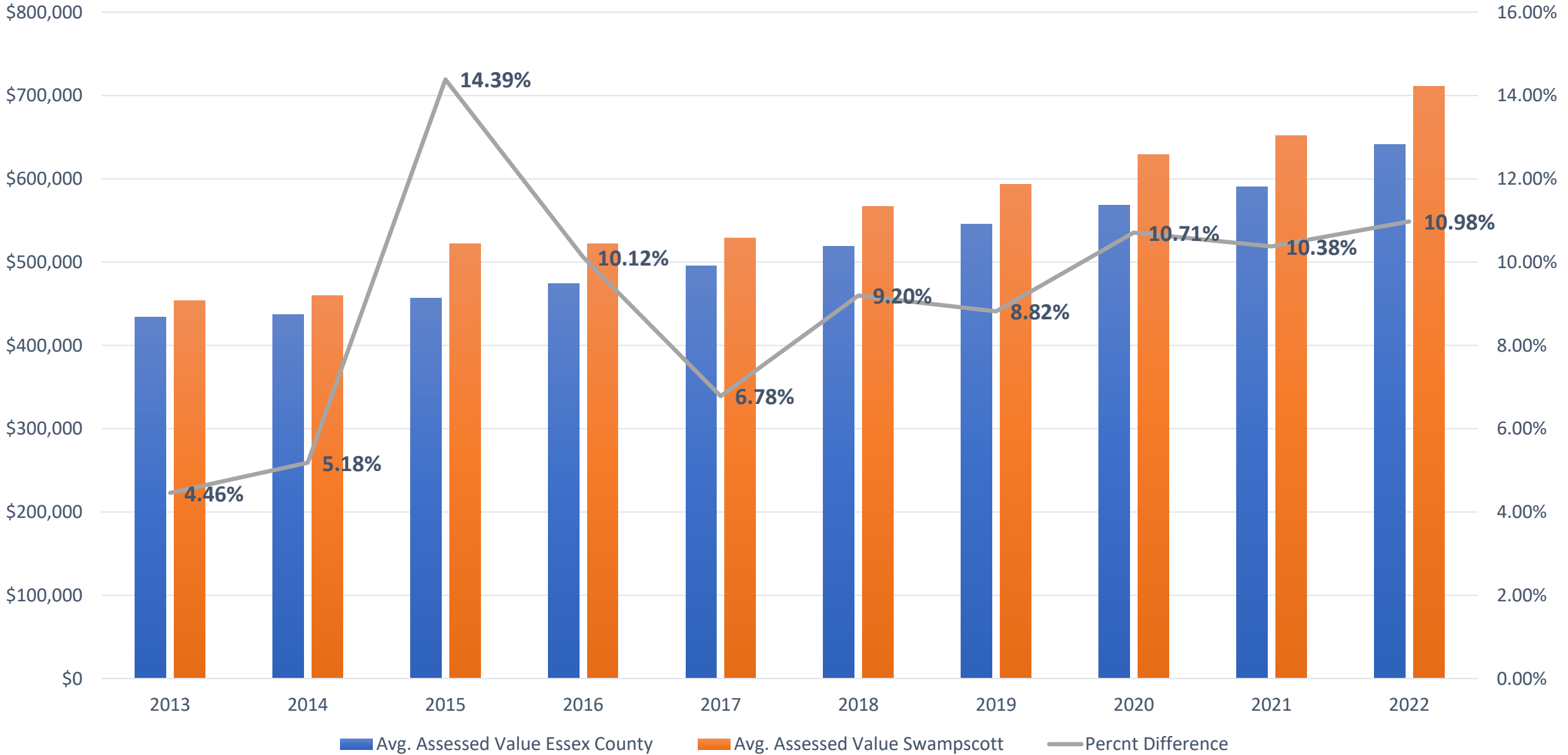
Essex county
tax increase
+40% on avg., in
Swampscott **7%** since
2013



A move to reflect the average tax bill in Essex County...

Average Single Family Value 2013-2022

Essex County/Swampscott



ESSEX COUNTY COMPARED TO THE SWAMPSCOTT AVERAGE SINGLE-FAMILY TAX BILLS

	AVERAGE ESSEX COUNTY SINGLE	AVERAGE ESSEX COUNTY	AVERAGE SWAMPSCOTT SINGLE	AVERAGE SWAMPSCOTT SINGLE	Varance Avg. Swampscott
FISCAL YEAR	FAMILY ASSESSED VALUE	SINGLE FAMILY TAX BILL	FAMILY ASSESSED VALUE	FAMILY TAX BILL	Single Family vs. Essex
					County
2013	\$383,471	\$5,935	\$453,328	\$8,540	\$2,605
2014	\$385,587	\$6,101	\$459,521	\$8,593	\$2,492
2015	\$405,179	\$6,360	\$522,531	\$8,961	\$2,601
2016	\$421,003	\$6,615	\$522,109	\$9,048	\$2,433
2017	\$439,984	\$6,850	\$528,670	\$9,225	\$2,375
2018	\$463,933	\$7,080	\$567,045	\$9,073	\$1,993
2019	\$490,000	\$7,352	\$593,524	\$9,022	\$1,670
2020	\$551,791	\$7,536	\$629,266	\$8,999	\$1,463
2021	\$574,100	\$7,815	\$652,094	\$8,999	\$1,184
2022	\$641,109	\$8,438	\$711,479	\$9,128	\$690

SWAMPSCOTT PEER GROUP

SWAMPSCOTT

Population: 15,111*

Average Home Value: \$726,758

Commercial Assessment: 13%

Rockport

Population: 6,992

Average Home Value: \$738,075

Commercial Assessment: 5%

Distance 19.5 Miles

Winthrop

Population: 19,316

Average Home Value: \$545,041

Commercial Assessment: 6%

Distance 7.7 miles

Ipswich

Population: 13,785

Average Home Value: \$618,795

Commercial Assessment: 11%

Distance 14.6 miles

Georgetown

Population: 7,545

Average Home Value: \$535,847

Commercial Assessment: 10%

Distance 17.9 miles

Middleton

Population 9,799

Average Home Value: \$689,086

Commercial Assessment: 18%

Distance 9.8 Miles

Hamilton

Population: 11,249

Average Home Value: \$629,160

Commercial Assessment: 4%

Distance 11.7 miles

Hull

Population: 10,072

Average Home Value: \$537,568

Commercial Assessment: 4%

Distance 13.2 miles

Newburyport

Population: 18,289

Average Home Value: \$701,897

Commercial Assessment: 12%

Distance 23.4 miles

Marblehead

Population: 20,441

Average Home Value: \$9444,418

Commercial Assessment: 5%

Adjacent Community

Manchester by the Sea

Population: 5,395

Average Home Value: \$1,334,021

Commercial Assessment: 6.5%

Distance 11 miles

Scituate

Population: 19,063

Average Home Value: \$695,958

Commercial Assessment: 4%

Distance 20.4 miles

Lynnfield

Population: 13,000

Average Home Value: \$818,833

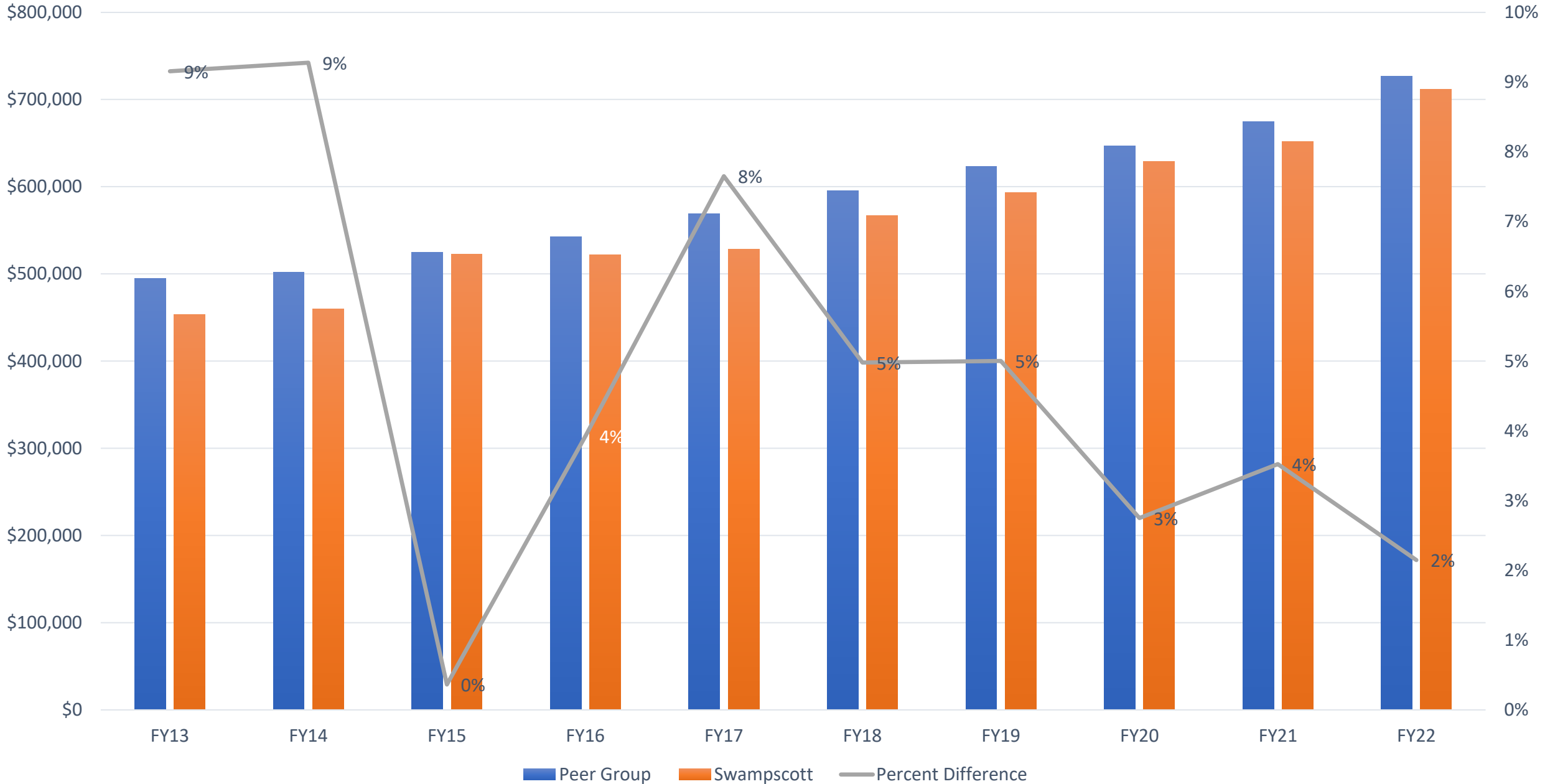
Commercial Assessment: 12%

Distance 8.4 miles

* All population figures are taken from the 2020 census.

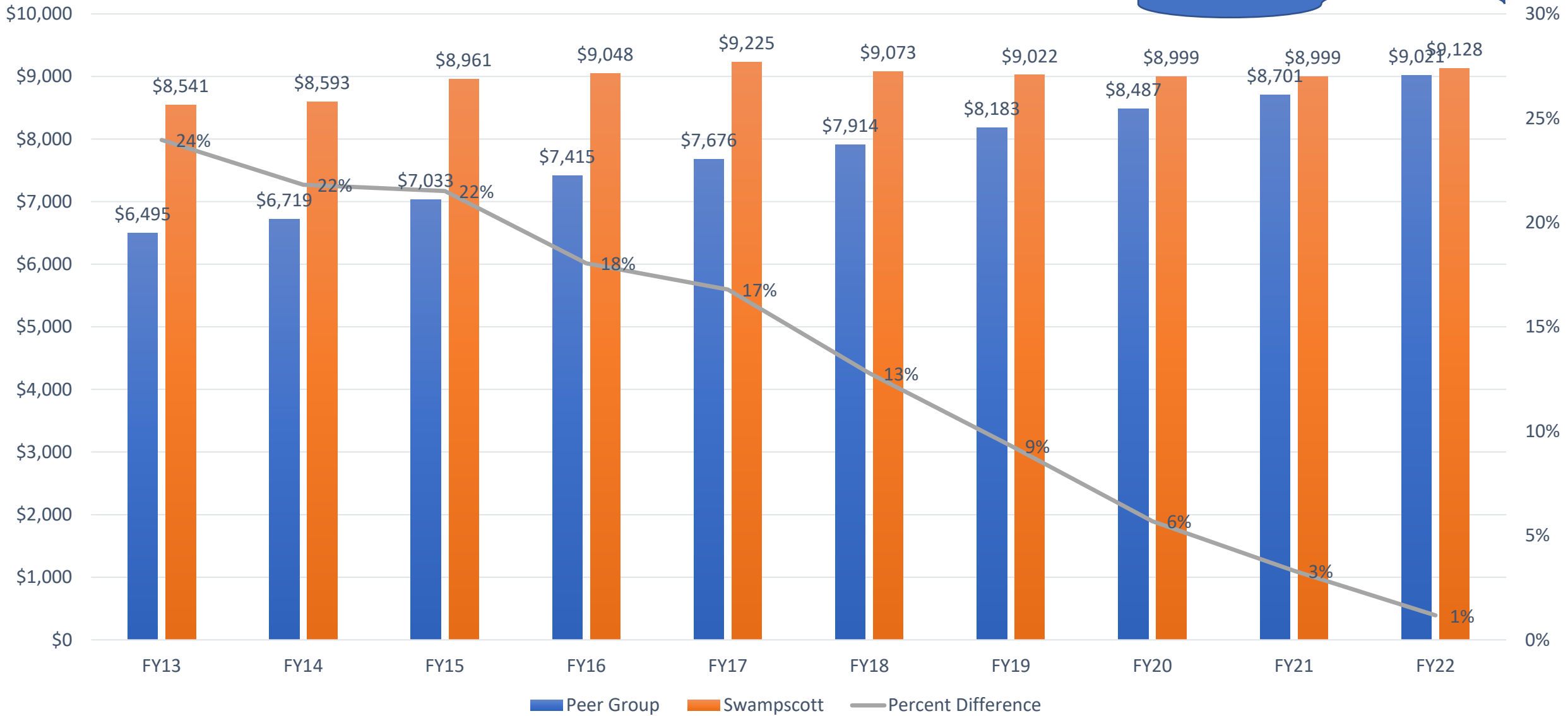
Average Values are as of FY2022.

Peer Group Single Family Assessed Values

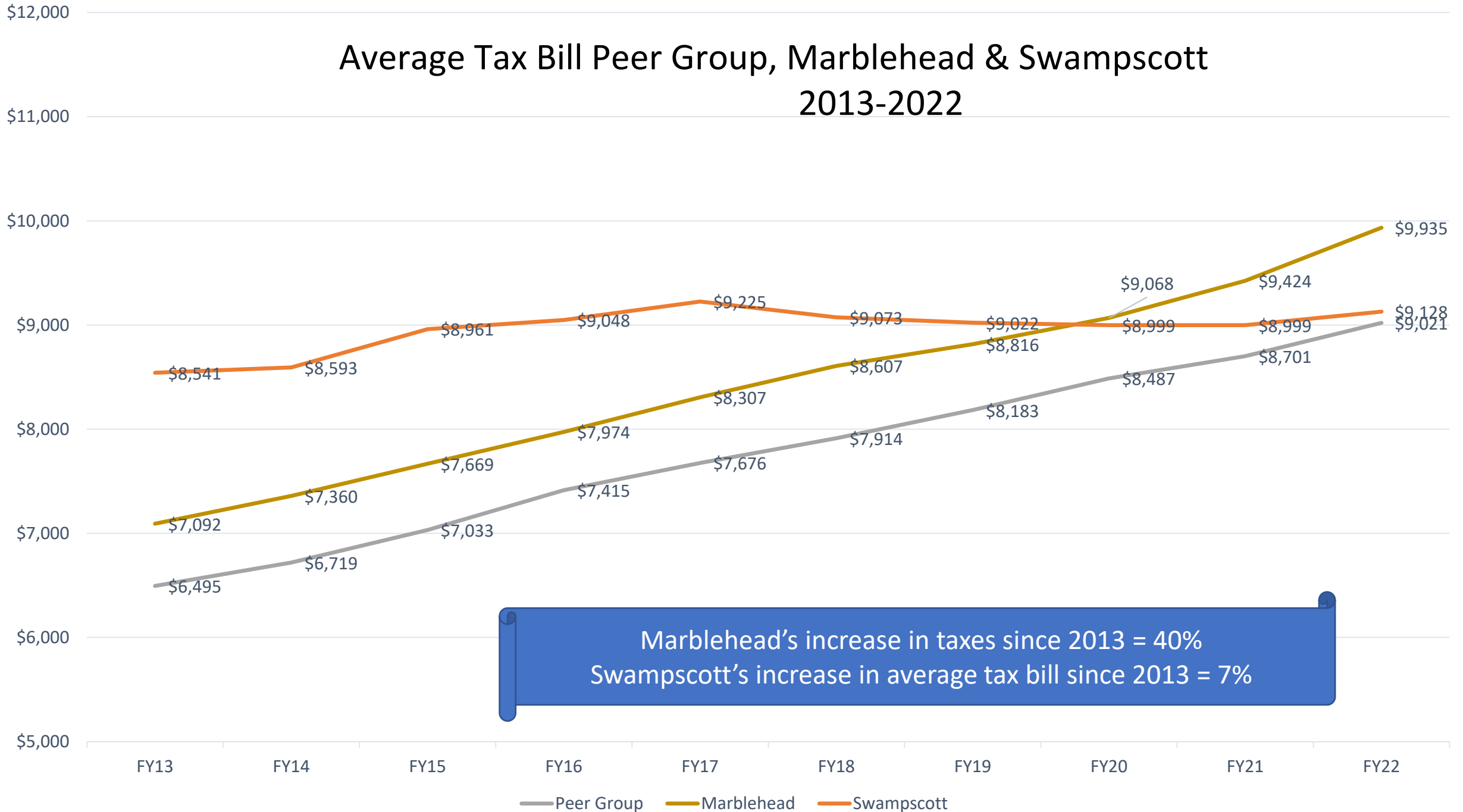


Average Single Family Tax Bill 2013-2012 Peer Group / Swampscott

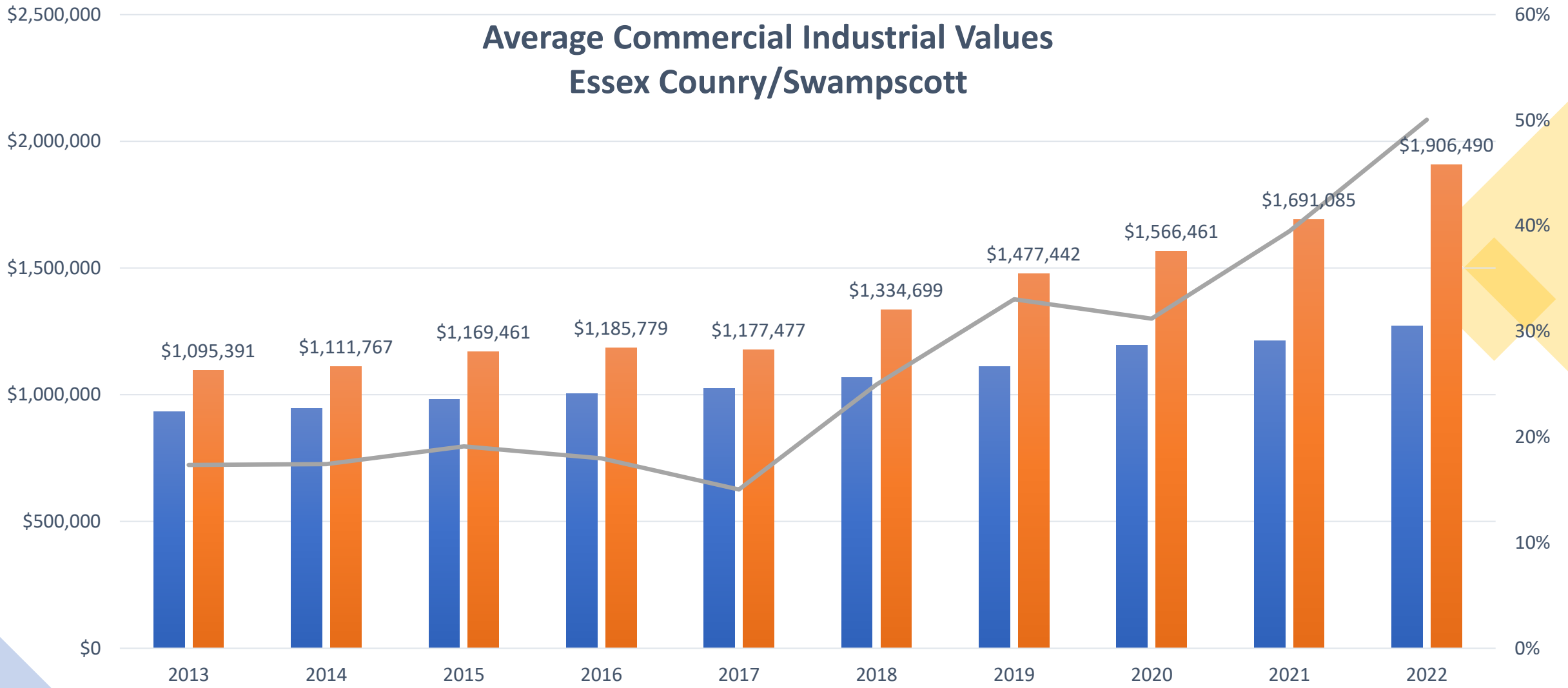
**Peer group increase 39%,
Swampscott's 7%**



Average Tax Bill Peer Group, Marblehead & Swampscott 2013-2022

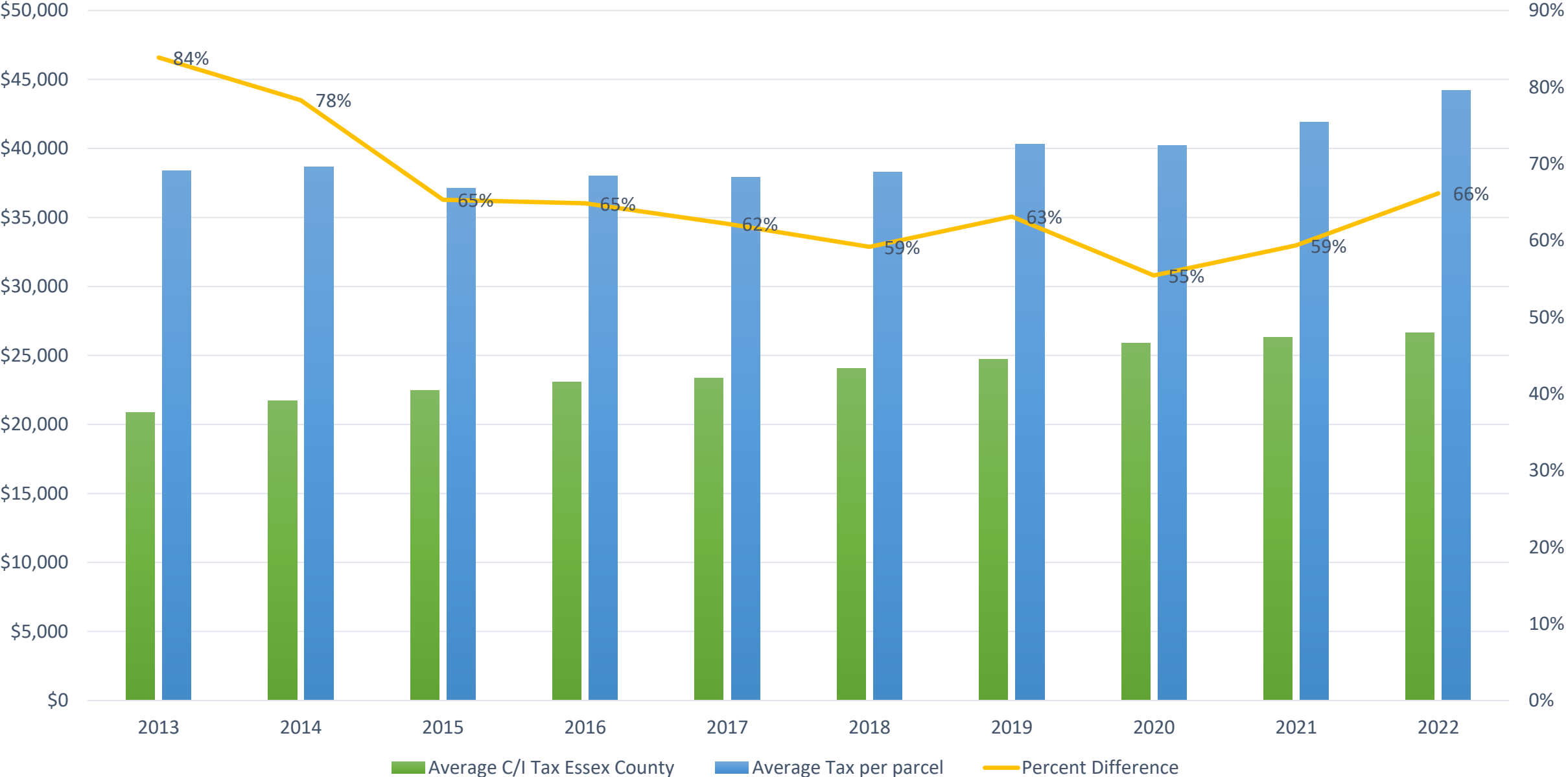


Average Commercial Industrial Values Essex County/Swampscott



■ Average C/I Assessed Values Essex County
 ■ Average C/I Assessed Values Swampscott
 — Percent Difference

Average Commercial Industrial Tax Bill, Essex County/Swampscott



SWAMPSCOTT AVERAGE COMMERCIAL/INDUSTRIAL TAX BILL

FISCAL YEAR	AVERAGE ESSEX COUNTY COMMERCIAL/INDUSTRIAL ASSESSED VALUE	AVERAGE ESSEX COUNTY COMMERCIAL/INDUSTRIAL TAX BILL	AVERAGE SWAMPSCOTT COMMERCIAL/INDUSTRIAL ASSESSED VALUE	AVERAGE SWAMPSCOTT COMMERCIAL/INDUSTRIAL TAX BILL	VARIANCE AVERAGE SWAMPSCOTT COMMERCIAL VS. ESSEX COUNTY COMMERCIAL
2013	\$933,489	\$20,863	\$1,095,489	\$38,361	\$17,498
2014	\$946,763	\$21,692	\$1,111,767	\$38,678	\$16,986
2015	\$981,801	\$22,448	\$1,169,461	\$37,107	\$14,659
2016	\$1,005,153	\$23,070	\$1,185,779	\$38,028	\$14,958
2017	\$1,023,634	\$23,380	\$1,177,477	\$37,915	\$14,535
2018	\$1,068,084	\$24,051	\$1,334,699	\$38,283	\$14,232
2019	\$1,110,586	\$24,717	\$1,477,442	\$40,321	\$15,604
2020	\$1,193,947	\$25,877	\$1,566,461	\$40,224	\$14,347
2021	\$1,212,583	\$26,313	\$1,691,085	\$41,933	\$15,620
2022	\$1,270,654	\$26,622	\$1,906,490	\$44,231	\$17,609

TAX POLICY OPTIONS

Five Major Components of Tax Policy

1. Setting the Town Budget
2. Estimating Local Receipts
3. Small Business Exemption / Residential Exemption
4. Application of Free Cash/Reserves to mitigate tax increases
5. Split Tax Rate

FY2023 Estimated Appropriations

DOR TAX RATE RECAP FORM (PAGE 4)



APPROPRIATIONS						
FY*	(a) Total Appropriations Of Each Meeting	(b) From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)
2023	300,000.00	0.00	0.00	300,000.00	0.00	0.00
2023	4,509.00	0.00	0.00	4,509.00	0.00	0.00
2022	528.21	0.00	528.21	0.00	0.00	0.00
2023	73,677,547.00	66,128,633.00	0.00	0.00	0.00	7,548,914.00
2022	0.00	0.00	0.00	0.00	0.00	0.00
2023	0.00	0.00	0.00	0.00	0.00	0.00
2023	0.00	0.00	0.00	0.00	0.00	0.00
2023	0.00	0.00	0.00	0.00	0.00	0.00
2023	-408,492.00	31,603.00	0.00	0.00	0.00	-440,095.00
2023	0.00	0.00	0.00	0.00	0.00	0.00
Total	73,574,092.21	66,160,236.00	528.21	304,509.00	0.00	7,108,819.00

Projected FY2023



FY2023 State Charges:

\$1,838,892



State Charges:
(primarily MBTA and
Charter Schools)

State Charges are added to amount
to be raised by taxation

B. STATE ASSESSMENTS AND CHARGES:

Retired Employees Health Insurance	0
Retired Teachers Health Insurance	0
Mosquito Control Projects	24,120
Air Pollution Districts	5,788
Metropolitan Area Planning Council	8,440
Old Colony Planning Council	0
RMV Non-Renewal Surcharge	11,700
Sub-Total, State Assessments:	50,048

C. TRANSPORTATION AUTHORITIES:

MBTA	348,947
Boston Metro. Transit District	0
Regional Transit	0
Sub-Total, Transportation Assessments:	348,947

D. ANNUAL CHARGES AGAINST RECEIPTS:

Multi-Year Repayment Program	0
Special Education	0
Sub-Total, Annual Charges Against Receipts:	0

E. TUITION ASSESSMENTS:

School Choice Sending Tuition	109,753
Charter School Sending Tuition	1,330,144
Sub-Total, Tuition Assessments:	1,439,897

F. TOTAL ESTIMATED CHARGES:

1,838,892

+\$345,314 Compared to FY22

FY2023 Estimated Revenue to be Raised:

II. Amounts to be raised

IIa. Appropriations (col.(b) through col.(g) from page 4)

73,574,092.21

IIb. Other amounts to be raised

1. Amounts certified for tax title purposes

0.00

2. Debt and interest charges not included on page 4

0.00

3. Final Awards

0.00

4. Retained Earnings Deficit

0.00

5. Total cherry sheet offsets (see cherry sheet 1-ER)

34,736.00

Aid to Libraries

6. Revenue deficits

0.00

7. Offset receipts deficits Ch. 44, Sec. 53E

0.00

8. CPA other unappropriated/unreserved

0.00

9. Snow and ice deficit Ch. 44, Sec. 31D

0.00

10. Other

0.00

Overlay is an estimate needed to pay for tax appeals and is added to the amount of revenue needed

TOTAL IIb

34,736.00

IIc. State and county cherry sheet charges (C.S. 1-EC)

1,838,892.00

IIId. Allowance for abatements and exemptions (overlay)

183,108.27

IIe. Total amount to be raised (Total I

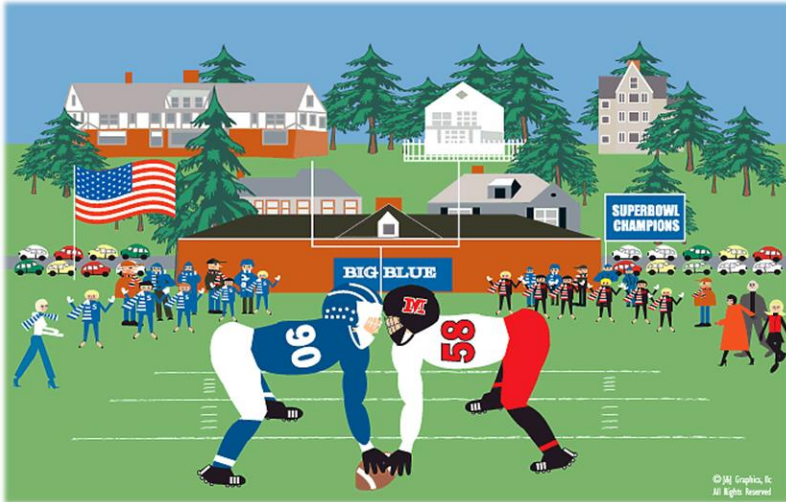
This is the estimated amount of revenue needed to be raised in FY22 from all sources

75,630,828.48

FY2023 State Aid:

Typically referred to as
"Cherry Sheet" by state
& local officials.

State Aid is broken
out into education
aid and general aid



This is used to offset the amount of
revenue needed from taxes

Net State Aid is +93,485 vs LY

A. EDUCATION

Distributions and Reimbursements

Chapter 70	4,631,706
School Transportation	0
Charter Tuition Reimbursement	467,657
Smart Growth School Reimbursement	0

Offset Items - Reserve for Direct Expenditure:

School Choice Receiving Tuition	0
Sub-Total, All Education Items:	5,099,363

B. GENERAL GOVERNMENT:

Distributions and Reimbursements

Unrestricted General Government Aid	1,499,440
Local Share of Racing Taxes	0
Regional Public Libraries	0
Veterans Benefits	26,351
Exemp: VBS and Elderly	25,272
State Owned Land	2,390

Offset Items - Reserve for Direct Expenditure:

Public Libraries	34,736
Sub-Total, All General Government:	1,588,189

C. TOTAL ESTIMATED RECEIPTS:

6,687,552

FY2023 Local Receipts Estimate



*Local Receipts Not Allocated

	Receipt Type Description	(a) Actual Receipts Fiscal 2022	(b) Estimated Receipts Fiscal 2023	Percentage Change
==>	1. MOTOR VEHICLE EXCISE	2,416,859.67	2,422,539.00	0.23
	2. OTHER EXCISE			
==>	a.Meals	349,762.81	362,355.00	3.60
==>	b.Room	44,919.00	36,996.00	-17.64
==>	c.Other	1,035.37	4,058.00	291.94
==>	d.Cannabis	80,908.51	80,909.00	0.00
==>	3. PENALTIES AND INTEREST ON TAXES AND EXCISES	301,939.37	240,014.00	-20.51
==>	4. PAYMENTS IN LIEU OF TAXES	12,000.00	18,000.00	50.00
	5. CHARGES FOR SERVICES - WATER	0.00	0.00	0.00
	6. CHARGES FOR SERVICES - SEWER	0.00	0.00	0.00
	7. CHARGES FOR SERVICES - HOSPITAL	0.00	0.00	0.00
	8. CHARGES FOR SERVICES - SOLID WASTE FEES	158,236.45	0.00	-100.00
	9. OTHER CHARGES FOR SERVICES	0.00	0.00	0.00
	10. FEES	74,486.10	74,486.00	0.00
	a.Cannabis Impact Fee	0.00	0.00	0.00
	b.Community Impact Fee Short Term Rentals	21,443.74	15,332.00	-28.50
	11. RENTALS	228,446.82	220,068.00	-3.67
	12. DEPARTMENTAL REVENUE - SCHOOLS	0.00	0.00	0.00
	13. DEPARTMENTAL REVENUE - LIBRARIES	891.99	0.00	-100.00
	14. DEPARTMENTAL REVENUE - CEMETERIES	54,230.00	55,173.00	1.74
	15. DEPARTMENTAL REVENUE - RECREATION	44,758.00	43,010.00	-3.91
	16. OTHER DEPARTMENTAL REVENUE	187,180.03	175,000.00	-6.51
	17. LICENSES AND PERMITS			
	a.Building Permits	592,353.00	887,489.00	49.82
	b.Other licenses and permits	49,790.00	49,790.00	0.00
	18. SPECIAL ASSESSMENTS	0.00	0.00	0.00
==>	19. FINES AND FORFEITS	29,377.19	29,377.00	0.00
==>	20. INVESTMENT INCOME	200,210.33	200,000.00	-0.11
==>	21. MEDICAID REIMBURSEMENT	0.00	0.00	0.00
==>	22. MISCELLANEOUS RECURRING	8,590.52	4,480.86	-47.84
	23. MISCELLANEOUS NON-RECURRING	47,375.77	61,537.08	29.99
	24. TOTALS	4,904,794.6	4,980,613.94	1.55

Motor Vehicle Excise

Meals Tax

Interest charged on
Late Tax Bills

Solid Waste Fees

Rentals

Dept. Revenues

Building Permits

This is first used to offset the
amount of revenue needed

FY2023 Estimated Levy



III. Estimated receipts and other revenue sources

IIIa. Estimated receipts - State

1. Cherry sheet estimated receipts (C.S. 1-ER Total)
2. Massachusetts school building authority payments

6,687,552.00
0.00

TOTAL IIIa

6,687,552.00

Carried over from prior 2 slides

IIIb. Estimated receipts - Local

1. Local receipts not allocated (page 3, col (b) Line 24)
2. Offset Receipts (Schedule A-1)
3. Enterprise Funds (Schedule A-2)
4. Community Preservation Funds (See Schedule A-4)

4,980,613.94
0.00
8,149,781.00
0.00

TOTAL IIIb

13,130,394.94

Water & Sewer Enterprise Fund Est. Revenue

IIIc. Revenue sources appropriated for particular purposes

1. Free cash (page 4, col (c))
2. Other available funds (page 4, col (d))

528.21
304,509.00

TOTAL IIIc

305,037.21

IIIId. Other revenue sources appropriated specifically to reduce the tax rate

- 1a. Free cash..appropriated on or before June 30, 2022
- 1b. Free cash..appropriated on or after July 1, 2022
2. Municipal light surplus
3. Other source :

0.00
0.00
0.00
0.00

TOTAL IIIId

0.00

Use of Free Cash/Stabilization to Reduce Tax Levy - TBD

Total Revenue other than property taxes

IIIe. Total estimated receipts and other revenue sources (Total IIIa through IIIId)

20,122,984.15

IV. Summary of total amount to be raised and total receipts from all sources

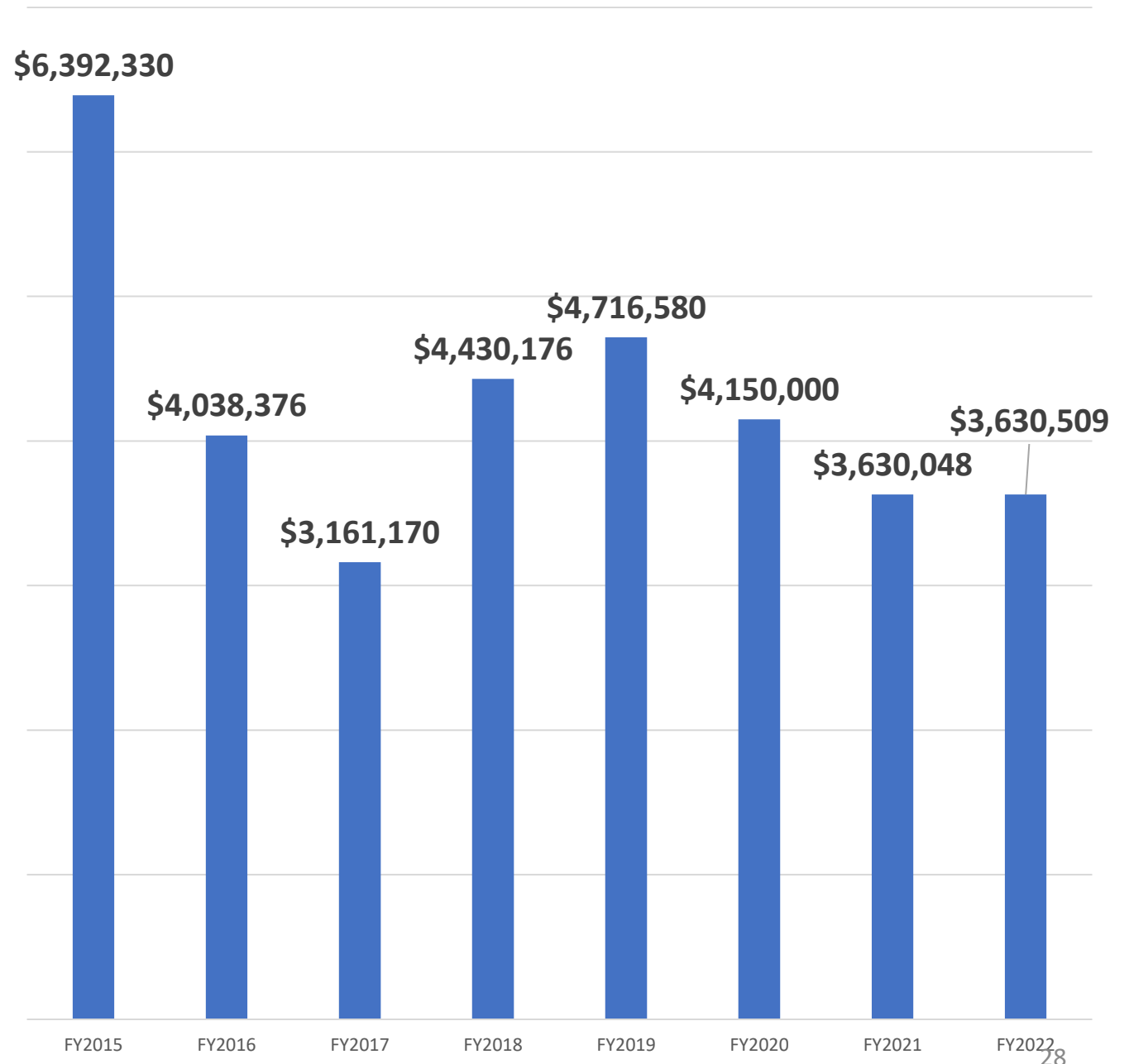
- a. Total amount to be raised (from IIe)
- b. Total estimated receipts and other revenue sources (from IIIe)
- c. Total real and personal property tax levy (from Ic)
- d. Total receipts from all sources (total IVb plus IVc)

75,630,828.48
20,122,984.15
55,507,844.33
75,630,828.48

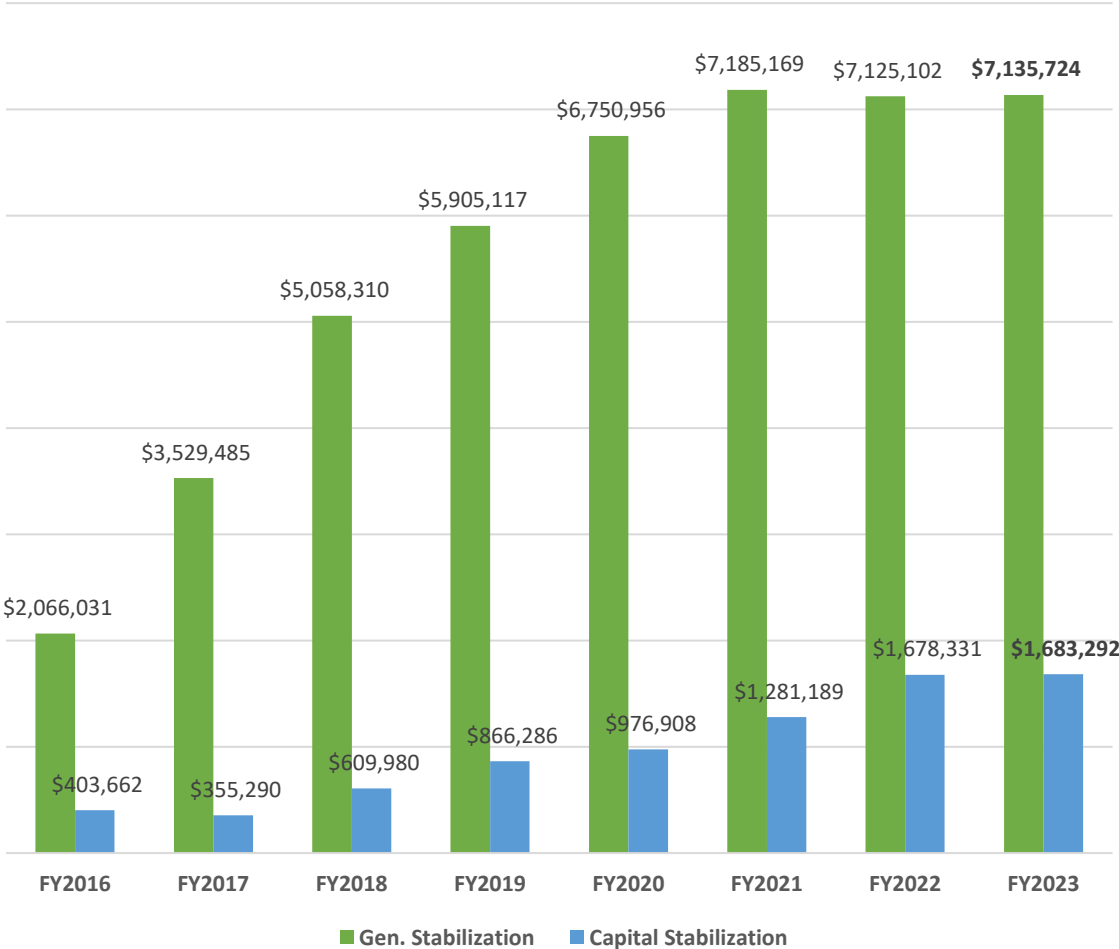
Est Tax Levy for FY2023 = 73.39% of appropriations

Free Cash Certification

- Free cash results from revenues in excess of estimates, and expenses below estimates
- Financial Policy requires maintenance of 3-5% of the operating budget in free cash
 - 3% Guideline: \$2,040,308
 - 5% Guideline: \$3,400,513
- Free cash has been declining since FY2020 as operating budgets continue to contract based on tight financial guidelines.
- Current Year Free Cash is \$3,630,509



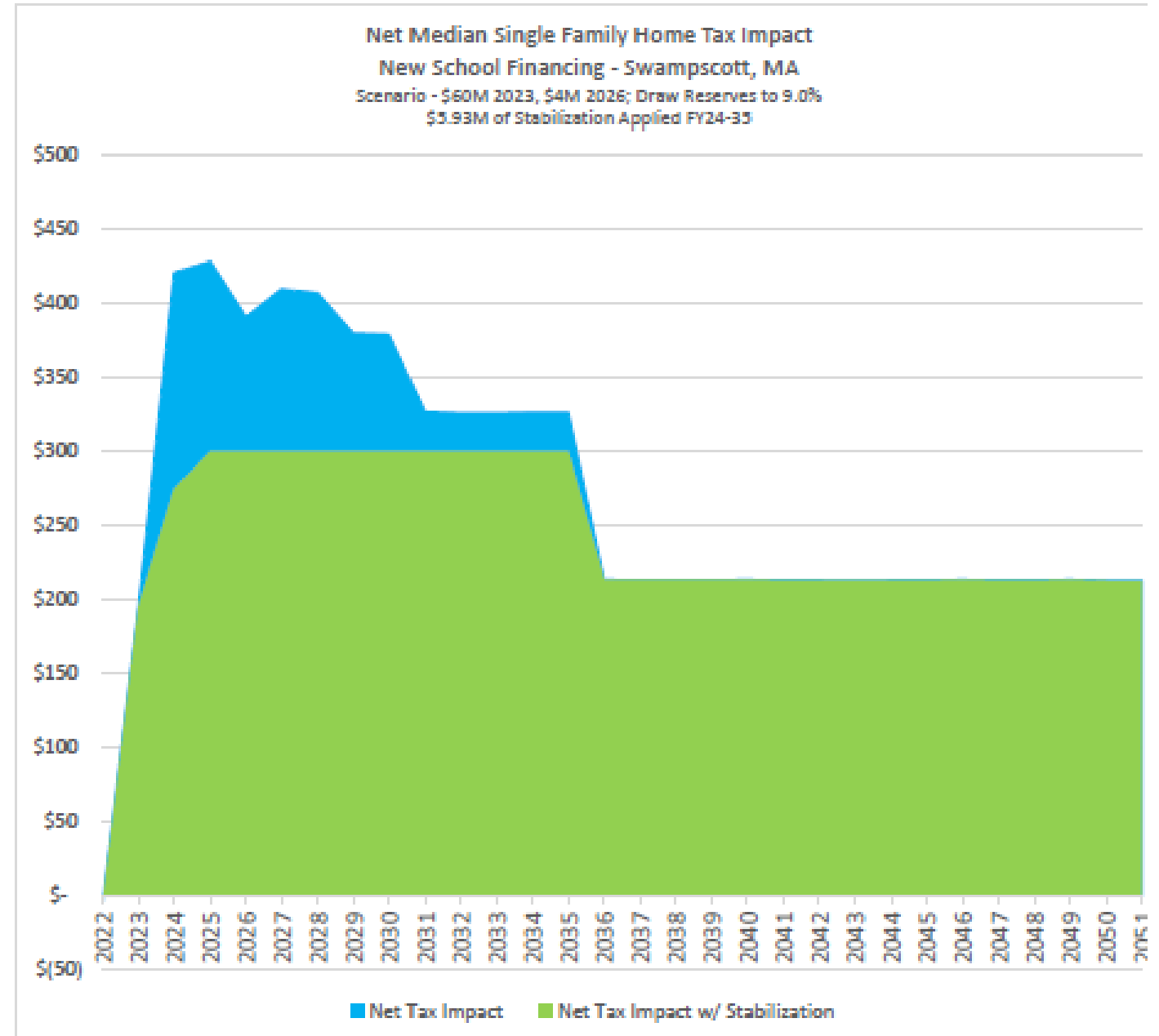
Other Financial Reserves



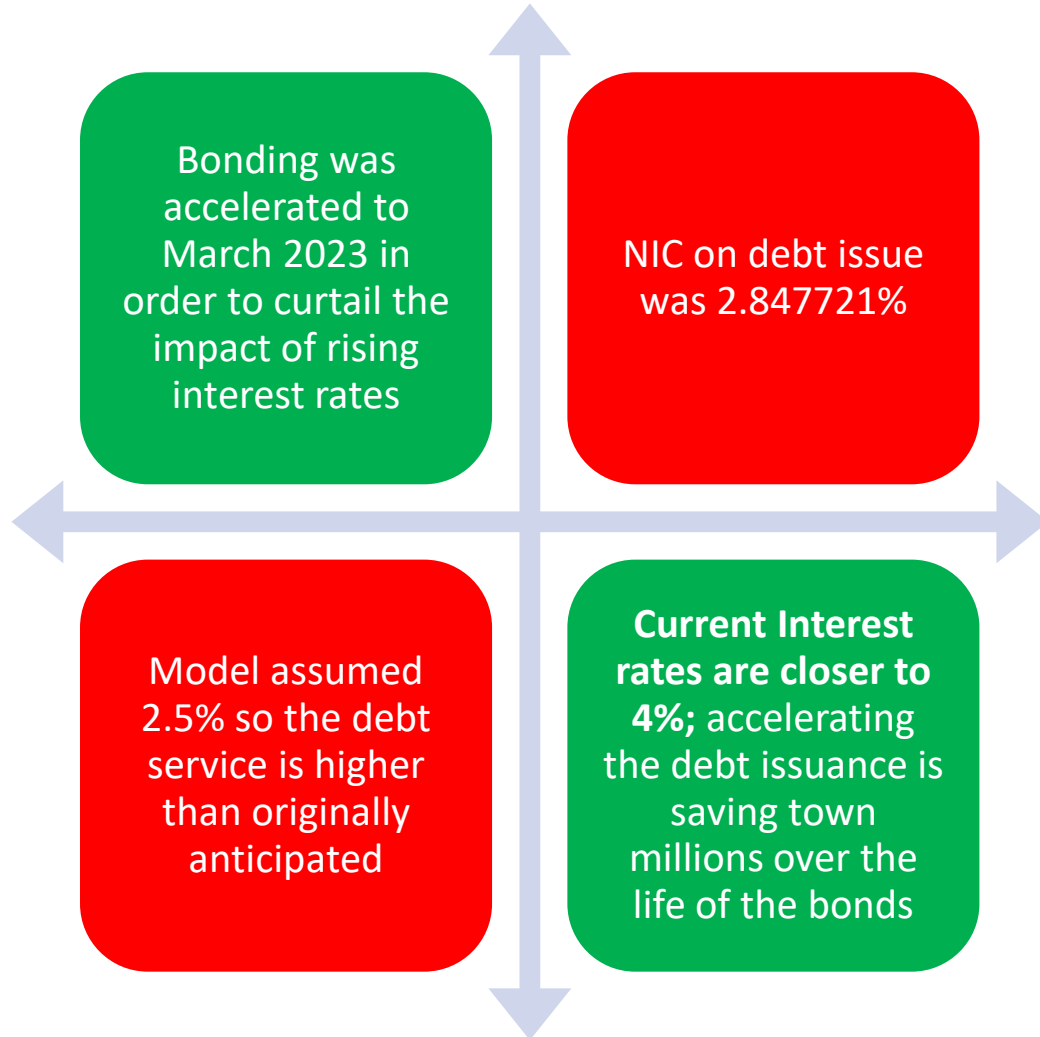
- General Stabilization and Capital Stabilization have been built up over the last eight years
 - Financial Policies require maintenance of 9-10% of the operating budget in the general stabilization fund, and 2-4% in the capital stabilization fund.
 - Between the two, the Town currently has 12.9% of the annual operating budget reserved

New School Debt

- Tax Impact of Construction Project Modeled in June 2021
- Based on assumed \$64,000,000 debt for the local share of the project
- Allocated Reserves to mitigate the impact to tax payers
- Estimated Net impact to median single family homeowner was pegged at \$300 with offsets from Stabilization funds.



Model vs. Actual



- Current Median Single Family Home Value is \$685,900
 - MSFH Value in FY21 was \$516,400
 - 32% Increase
- Residential growth is outpacing Commercial, Industrial, and Personal Property Growth
 - Puts pressure on the residential tax rate
- Town has sufficient reserves to offset the impact

Description	Amount
New School Debt Service - Yr 1	\$ 3,015,218
Residential Levy Percentage @ 170% Shift	\$ 0.878891
Residential Share of New School Debt	\$ 2,650,048
FY23 Total Residential Values	\$ 4,013,446,301
Residential Tax Rate Impact - New School	\$ 0.66
FY23 Median Single-Family Value	\$ 685,900
Gross Tax Impact, School Only	\$ 453
Stabilization Use:	\$ 1,017,920
New School Debt Service Net of Stabilization Use - Yr 1	\$ 1,997,298
Residential Levy Percentage @ 170% Shift	\$ 0.878891
Residential Share of New School Debt	\$ 1,755,407
FY23 Total Residential Values	\$ 4,013,446,301
Residential Tax Rate Impact - New School	\$ 0.44
FY23 Median Single-Family Value	\$ 685,900
Net Tax Impact, School Only	\$ 300

FY23 Tax Impacts

- Despite changes in conditions vs the June 2021 model, the Town can still manage the tax impact of the project using a prudent amount of Town reserves.
 - For example, the use of approximately \$1M of stabilization will keep the tax impact attributable to the new school debt to \$300 for the median single-family home in FY23.
- Due to rise in interest rates, earnings on the Town's deposits will generate additional local receipts in the coming years which can be appropriated to replenish reserves

Free Cash Options - 150% Shift

Actual Levy % Incr	Actual Levy	CIP Shift	Free Cash Allocated	Stabilization Allocated	Total One-Time Funds Applied	Residential Rate	Average Single Fam	Difference v 2022	Difference %	Median Single Fam	Difference v. 2022	Difference %
8.2%	55,599,253	1.5	-	-	-	\$ 12.42	\$ 10,233	\$ 1,105	12.1%	\$ 8,516	\$ 949	12.5%
6.2%	54,599,253	1.5	500,000	500,000	1,000,000	\$ 12.19	\$ 10,049	\$ 921	10.1%	\$ 8,362	\$ 795	10.5%
5.3%	54,099,253	1.5	750,000	750,000	1,500,000	\$ 12.08	\$ 9,957	\$ 829	9.1%	\$ 8,286	\$ 719	9.5%
4.3%	53,599,253	1.5	1,000,000	1,000,000	2,000,000	\$ 11.97	\$ 9,865	\$ 737	8.1%	\$ 8,209	\$ 642	8.5%
3.3%	53,099,253	1.5	1,250,000	1,250,000	2,500,000	\$ 11.86	\$ 9,773	\$ 645	7.1%	\$ 8,133	\$ 566	7.5%
2.3%	52,599,253	1.5	1,500,000	1,500,000	3,000,000	\$ 11.75	\$ 9,681	\$ 553	6.1%	\$ 8,056	\$ 489	6.5%
1.4%	52,099,253	1.5	1,750,000	1,750,000	3,500,000	\$ 11.63	\$ 9,589	\$ 461	5.1%	\$ 7,980	\$ 413	5.5%
0.4%	51,599,253	1.5	2,000,000	2,000,000	4,000,000	\$ 11.52	\$ 9,497	\$ 369	4.0%	\$ 7,903	\$ 336	4.4%
-1.6%	50,599,253	1.5	2,500,000	2,500,000	5,000,000	\$ 11.30	\$ 9,313	\$ 185	2.0%	\$ 7,750	\$ 183	2.4%

Free Cash Options - 170% Shift

Actual Levy % Incr	Actual Levy	CIP Shift	Free Cash Allocated	Stabilization Allocated	Total One-Time Funds Applied	Residential Rate	Average Single Fam	Difference v 2022	Difference %	Median Single Fam	Difference v. 2022	Difference %
8.2%	55,599,253	1.7	-	-	-	\$ 12.18	\$ 10,036	\$ 908	9.9%	\$ 8,351	\$ 784	10.4%
6.2%	54,599,253	1.7	500,000	500,000	1,000,000	\$ 11.96	\$ 9,855	\$ 727	8.0%	\$ 8,201	\$ 634	8.4%
5.3%	54,099,253	1.7	750,000	750,000	1,500,000	\$ 11.85	\$ 9,765	\$ 637	7.0%	\$ 8,126	\$ 559	7.4%
4.3%	53,599,253	1.7	1,000,000	1,000,000	2,000,000	\$ 11.74	\$ 9,675	\$ 547	6.0%	\$ 8,051	\$ 484	6.4%
3.8%	53,349,253	1.7	1,250,000	1,000,000	2,250,000	\$ 11.68	\$ 9,630	\$ 502	5.5%	\$ 8,013	\$ 446	5.9%
3.3%	53,099,253	1.7	1,250,000	1,250,000	2,500,000	\$ 11.63	\$ 9,584	\$ 456	5.0%	\$ 7,976	\$ 409	5.4%
2.3%	52,599,253	1.7	1,500,000	1,500,000	3,000,000	\$ 11.52	\$ 9,494	\$ 366	4.0%	\$ 7,901	\$ 334	4.4%
1.4%	52,099,253	1.7	1,750,000	1,750,000	3,500,000	\$ 11.41	\$ 9,404	\$ 276	3.0%	\$ 7,825	\$ 258	3.4%
0.4%	51,599,253	1.7	2,000,000	2,000,000	4,000,000	\$ 11.30	\$ 9,314	\$ 186	2.0%	\$ 7,750	\$ 183	2.4%
-1.6%	50,599,253	1.7	2,500,000	2,500,000	5,000,000	\$ 11.08	\$ 9,133	\$ 5	0.1%	\$ 7,600	\$ 33	0.4%

USE OF RESERVES TO OFF-SET LEVY

Free Cash Options - 170% Shift

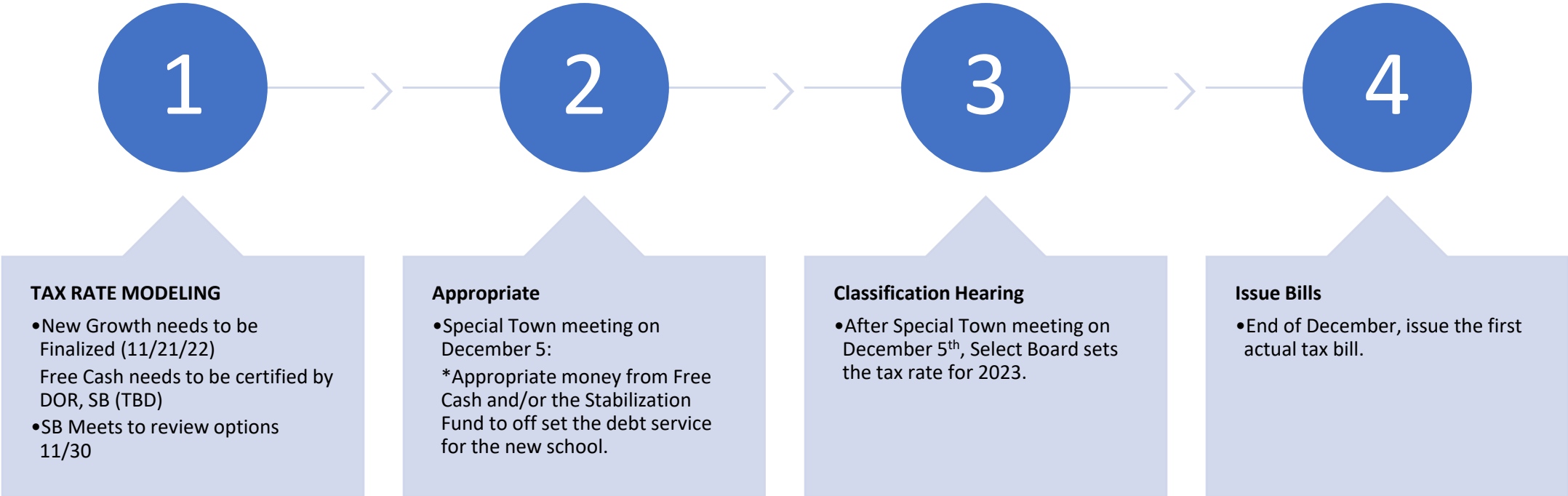
Actual Levy % Incr	Actual Levy	CIP Shift	Free Cash Allocated	Stabilization Allocated	Total One-Time Funds Applied	Residential Rate	Average Single Fam	Difference v 2022	Difference %	Median Single Fam	Difference v. 2022	Difference %	Free Cash Position	Stabilization Position	NOTES
8.2%	55,599,253	1.7	-	-	-	\$ 12.18	\$ 10,036	\$ 908	9.9%	\$ 8,351	\$ 784	10.4%	4.9%	10.5%	Actual Levy to balance the Budget, the Debt service for the new school is \$452.89)
6.2%	54,599,253	1.7	500,000	500,000	1,000,000	\$ 11.96	\$ 9,855	\$ 727	8.0%	\$ 8,201	\$ 634	8.4%	4.6%	9.8%	Modest use of Free Cash & Stabilization; does not offset the impact of the new school
5.3%	54,099,253	1.7	750,000	750,000	1,500,000	\$ 11.85	\$ 9,765	\$ 637	7.0%	\$ 8,126	\$ 559	7.4%	3.8%	9.4%	More moderate use of Free Cash and Stabilization but does not offset impact
4.3%	53,599,253	1.7	1,000,000	1,000,000	2,000,000	\$ 11.74	\$ 9,675	\$ 547	6.0%	\$ 8,051	\$ 484	6.4%	3.4%	9.0%	\$2M off sets the Debt Service for the new school to \$300 along with Capital & Budget Growth
3.8%	53,349,253	1.7	1,250,000	1,000,000	2,250,000	\$ 11.68	\$ 9,630	\$ 502	5.5%	\$ 8,013	\$ 446	5.9%	3.0%	9.0%	\$2.25M offsets the New School Debt Service and additional Capital Debt & Budget Growth while staying within our Financial Policies for reserve targets
3.3%	53,099,253	1.7	1,250,000	1,250,000	2,500,000	\$ 11.63	\$ 9,584	\$ 456	5.0%	\$ 7,976	\$ 409	5.4%	3.0%	8.7%	Free cash is in range but Stabilization drops below.
2.3%	52,599,253	1.7	1,500,000	1,500,000	3,000,000	\$ 11.52	\$ 9,494	\$ 366	4.0%	\$ 7,901	\$ 334	4.4%	2.7%	8.3%	Free cash and Stabilization drops below range.
1.4%	52,099,253	1.7	1,750,000	1,750,000	3,500,000	\$ 11.41	\$ 9,404	\$ 276	3.0%	\$ 7,825	\$ 258	3.4%	2.3%	7.9%	Free cash and Stabilization drops below range.
0.4%	51,599,253	1.7	2,000,000	2,000,000	4,000,000	\$ 11.30	\$ 9,314	\$ 186	2.0%	\$ 7,750	\$ 183	2.4%	1.9%	7.6%	Free cash and Stabilization drops below range.
-1.6%	50,599,253	1.7	2,500,000	2,500,000	5,000,000	\$ 11.08	\$ 9,133	\$ 5	0.1%	\$ 7,600	\$ 33	0.4%	1.2%	6.8%	Free cash and Stabilization drops below range.

Notes:

Free Cash Target Range is 3% - 5%; Certified at \$3,630,509

Stabilization Reserve Range is 9% - 10%; Current Balance is \$7,138,000

NEXT STEPS



DECEMBER 5, 2022

SPECIAL TOWN MEETING



WARRANT REPORT

TOWN OF SWAMPSCOTT, MASSACHUSETTS

TOWN OF SWAMPSCOTT



DECEMBER 5, 2022 SPECIAL TOWN MEETING WARRANT

December 5, 2022

Special Town Meeting Warrant

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Notice of Special Town Meeting

MONDAY, DECEMBER 5, 2022, 7:00PM

To Town Meeting Members:

Notice is hereby given in accordance with Article I, Section 2, of the Bylaws of the Town of Swampscott that the Special Town Meeting will be held on Monday, December 5, 2022, beginning at 7:00 p.m. in the Swampscott High School Auditorium located at 200 Essex Street, Swampscott.

The required identification badge is to be picked up at the auditorium entrance when you check in.

Town Moderator, Michael McClung will preside.

Respectfully,

Jared H. LaLiberte
Town Clerk

NOTICE OF PRECINCT CAUCUS MEETINGS

Caucus meetings for all Swampscott precincts have been scheduled for Monday, December 5, 2022, beginning at 6:45 pm in the Swampscott High School located at 200 Essex Street, Swampscott. Room assignments are as follows:

Precinct 1 – Room B128	Precinct 4 – Room C104
Precinct 2 – Room C101	Precinct 5 – Room C105
Precinct 3 – Room C103	Precinct 6 – Room C107

NOTES:

Please remember that it is YOUR responsibility to be recorded as being present with the door checkers prior to entering the auditorium for EACH session. Excessive absences are cause for removal from Town Meeting membership. Also, please remember the following:

1. You must wear (display) your Town Meeting identification badge at all times;
2. Remember to use the microphones when speaking on any issue so that your comments may be recorded on the official transcript of the meeting and be heard by your fellow members in the hall and residents viewing the live cable telecast.

Respectfully,

Jared H. LaLiberte
Town Clerk

TOWN OF SWAMPSCOTT

TOWN WARRANT

DECEMBER 5, 2022

ARTICLE # 1 *AMEND APPROPRIATION FOR FISCAL YEAR 2023 OPERATING BUDGET*

To see if the Town will vote to amend various line items in the FY2023 budget as recommended by the Finance Committee as follows, and further, to transfer from available funds, or borrow a sum of money therefor, or take any action relative thereto.

Sponsored by the Finance Committee

Comment: The Finance Committee will report on the FY2023 operating budget and may alter or change its recommendations on the floor of Town Meeting.

The Select Board recommends favorable action on this article.

The Finance Committee recommends favorable action on this article.

Approved Budget FY2023	Org / Obj	Line Item No.	DEPARTMENTAL BUDGETS	Recommended Amendments	Recommended Budget as Approved
\$50,000	0113501 51120		ASSISTANT ACCOUNTANT	\$762	\$50,762
\$188,500	0113103	8	ACCOUNTING PERSONNEL SUBTOTAL	\$762	\$189,262
\$53,532	0114501 51016		CUSTOMER SERVICE REP. (CBA)	\$1,786	\$55,319
\$40,087	0114501 51120		ASSISTANT TREASURER	\$802	\$40,888
\$60,575	0114501 51121		CUST SERVICE SUPERVISOR	\$2,543	\$63,118
\$241,109	0114501	13	TREASURY/CUST SERV. PERSONNEL SUBTOTAL	\$5,131	\$246,240
\$182,797	0115203 51000		SALARY RESERVE	(\$130,050)	\$52,747
\$348,417	0115203	18	EXPENSE SUBTOTAL	(\$130,050)	\$218,367
			TOWN CLERK/ELECTIONS		
\$80,000	0116101 51010		TOWN CLERK	\$698	\$80,698
\$53,532	0116101 51016		ADMIN SUPPORT (CBA)	\$2,251	\$55,783
\$148,732	0116101	22	TOWN CLERK PERSONNEL SUBTOTAL	\$2,948	\$151,680
\$24,943	0125101 51015		WIRE INSPECTOR'S SALARY	\$499	\$25,442
\$53,532	0125101 51016		ADMIN SUPPORT (CBA)	\$1,786	\$55,319
\$1,301	0125101 51031		ASST.PLUMBING INSP.SALARY	\$26	\$1,327
\$25,984	0125101 51033		PLUMBING INSPECTORS SALAR	\$520	\$26,503
\$1,301	0125101 51034		ASST. ELECTRIC INSPECTOR	\$26	\$1,327
\$238,598	0125101	28	BUILDING PERSONNEL SUBTOTAL	\$2,857	\$241,455
\$75,000	0151001 51010		HEALTH OFFICER	\$6,190	\$81,190
\$72,000	0151001 51032		NURSE	\$3,426	\$75,426
\$150,150	0151001	30	HEALTH PERSONNEL SUBTOTAL	\$9,616	\$159,766
\$20,589	0119201 51130		ADMIN. ASSISTANT (CBA)	\$656	\$21,245
\$211,513	0119201	35	FACILITIES PERSONNEL SUBTOTAL	\$656	\$212,169
\$120,249	0149101 511000		PERSONNEL (CBA)	\$11,369	\$131,618
\$166,777	0149101	37	CEMETERY PERSONNEL SUBTOTAL	\$11,369	\$178,146
\$321,877	0149901 511000		PERSONNEL (CBA)	\$21,270	\$343,147
\$439,595	0149901	39	DPW PERSONNEL SUBTOTAL	\$21,270	\$460,865

Approved Budget FY2023	Org / Obj	Line Item No.	DEPARTMENTAL BUDGETS	Recommended Amendments	Recommended Budget as Approved
\$140,000	0121001 51010		CHIEF (CONTRACT)	\$539	\$140,539
\$100,598	0121001 51011		CAPTAINS SALARY & WAGES (CBA)	\$2,012	\$102,610
\$338,146	0121001 51012		LIEUTENANTS SAL. & WAGES (CBA)	\$6,763	\$344,909
\$464,153	0121001 51013		SERGEANTS SALARY & WAGES (CBA)	\$8,148	\$472,301
\$1,252,686	0121001 51014		PATROLMEN (CBA)	\$17,626	\$1,270,312
\$59,531	0121001 51015		SECRETARY'S SAL. & WAGES	\$991	\$60,522
\$49,148	0121001 51121		ANIMAL CONTROL OFFICER	\$2,046	\$51,194
\$300,580	0121001 51023		EDUCATIONAL INCENTIVES (CBA)	\$6,012	\$306,592
\$124,000	0121001 51050		HOLIDAY PAY (CBA)	\$2,480	\$126,480
\$17,714	0121001 51062		OVERTIME 5&2 SCHEDULE (CBA)	\$354	\$18,068
\$84,500	0121001 51106		LONGEVITY (CBA)	\$1,690	\$86,190
\$3,770,569	0121001	43	POLICE PERSONNEL SUBTOTAL	\$48,661	\$3,819,229
\$133,352	0122001 51010		CHIEF (CONTRACT)	\$438	\$133,790
\$3,523,206	0122001	48	FIRE PERSONNEL SUBTOTAL	\$438	\$3,523,644
\$2,000			DIRECTOR (STIPEND)	\$195	\$2,195
\$2,000	0129101	50	EMERGENCY MGMT PERSONNEL SUBTOTAL	\$195	\$2,195
\$80,000	0161001 51010		DIRECTOR	\$16,540	\$96,540
\$66,319	0161001 51011		ASSISTANT DIRECTOR	\$1,326	\$67,645
\$25,354	0161001 51015		SECRETARY/BOOKKEEPER (CBA)	\$507	\$25,861
\$58,981	0161001 51045		CHILDREN'S LIBRARIAN (CBA)	\$1,180	\$60,161
\$50,392	0161001 51046		CIRCULATION LIBRARIAN (CBA)	\$1,008	\$51,400
\$63,406	0161001 51047		REFERENCE LIBRARIAN (CBA)	\$1,268	\$64,674
\$54,249	0161001 51049		LIBRARY ASSISTANTS (CBA)	\$1,085	\$55,334
\$59,519	0161001 51051		ADULT ASSISTANTS - P/T (CBA)	\$1,190	\$60,709
\$34,574	0161001 51052		AV PROCESSORS (CBA)	\$692	\$35,266
\$67,488	0161001 51054		LIBRARIAN (CBA)	\$1,350	\$68,838
\$575,799	0161001	54	LIBRARY PERSONNEL SUBTOTAL	\$26,146	\$601,945
\$598,869	10300	60	TOTAL REGIONAL VOC TECH	\$31,603	\$630,472
\$68,010,257	-	-	TOTAL GENERAL FUND APPROPRIATIONS	\$31,603	\$68,041,860

Approved Budget FY2023	Org / Obj	Line Item No.	DEPARTMENTAL BUDGETS	Recommended Amendments	Recommended Budget as Approved
			ENTERPRISE FUNDS		
\$1,250,000	90152 58611		LYNN SEWER ASSESSMENT	(\$250,000)	\$1,000,000
\$1,749,500	90152	64	SEWER EXPENSE SUBTOTAL	(\$250,000)	\$1,499,500
\$3,338,949	-	-	TOTAL SEWER ENTERPRISE FUND	(\$250,000)	\$3,088,949
\$2,842,744	90252 58611		MWRA WATER	(\$190,095)	\$2,652,649
\$3,102,244	90252	67	WATER EXPENSE SUBTOTAL	(\$190,095)	\$2,912,149
\$4,660,944	-	-	TOTAL WATER ENTERPRISE FUND	(\$190,095)	\$4,470,849
\$9,844,890	-	-	ENTERPRISE FUNDS TOTALS	(\$440,095)	\$9,404,795
\$77,855,147	-	-	TOTAL APPROPRIATIONS - ALL FUNDS	(\$408,492)	\$77,446,655

ARTICLE # 2 *APPROVE TRANSFER OF FREE CASH AND/OR STABILIZATION – ADJUSTMENTS TO TAX RATES*

To see if the Town will vote to transfer from Free Cash and/or Stabilization a sum of money to the account of Current Revenue to be used and applied by the Board of Assessors in the reduction of the tax levy for Fiscal Year 2023, or take any action relative thereto.

Sponsored by the Town Administrator

Comment: This Article will take some of the surplus resulting from Town general fund operations as of the end of FY2022 and use it to off-set the tax levy for FY2023.

The Select Board will report on this Article at Town Meeting.

The Finance Committee will report on this Article at Town Meeting.

ARTICLE # 3 *APPROVE TRANSFER OF FREE CASH – COLLECTIVE BARGAINING AGREEMENTS*

To see if the Town will vote to transfer a sum of money from Free Cash to fund provisions of Collective Bargaining Agreements between the Town of Swampscott and certain Town unions, or take any action relative thereto.

Sponsored by the Town Administrator

Comment: This Article will potentially fund provisions of Collective Bargaining Agreements that are under negotiation if negotiations are settled prior to Town Meeting, otherwise this article will be recommended for indefinite postponement.

The Select Board will report on this Article at Town Meeting.

The Finance Committee will report on this Article at Town Meeting.

ARTICLE # 4 *ESTABLISH A COMPENSATED ABSENCES RESERVE FUND*

To see if the Town will vote to accept the provisions of G.L. c.40, §13D to establish a compensated absences reserve fund for the future payment of accrued liabilities for compensated absences due any employee or full-time officer of the Town upon termination of employment and to designate the Town Administrator as the Town official authorized to make payments from said fund; and further, to transfer the sum of \$250,000 from Free Cash to the Compensated Absences Reserve Fund established hereunder, or take any action in relation thereto.

Sponsored by the Select Board

Comment: This Article will potentially establish this Reserve Fund for the purpose of paying end of employment costs associated with retirement.

The Select Board will report on this Article at Town Meeting.

The Finance Committee will report on this Article at Town Meeting.

ARTICLE # 5 GENERAL BYLAWS – REVOLVING FUNDS

To see if the Town will vote to amend General Bylaws Article XXI, Section 2 to establish the annual spending limit for the Recreation Department Revolving Fund in accordance with G.L. Chapter 44, §53E ½, with such updated expenditure limit, to be applicable for each fiscal year until such time as Town Meeting votes, prior to July 1 in any year, to increase the same for the ensuing fiscal year; provided, however, that at the request of the entity authorized to expend such funds, the Select Board, with the approval of the Finance Committee, may increase such limit, for that fiscal year only, all as set forth below:

PROGRAM OR PURPOSE	FISCAL YEAR SPENDING LIMIT
Recreation*	\$500,000 (*was \$300,000)

, or take any action relative thereto.

Sponsored by Select Board.

Comment: The intent of this article is to vote the new spending limit for the Town’s Recreation Department revolving fund.

The Select Board recommends favorable action on this Article at Town Meeting.

The Finance Committee will report on this Article at Town Meeting.

ARTICLE # 6 APPROPRIATION FOR RECOMMENDED CAPITAL PROJECTS

To see if the -Town will vote to raise and appropriate, transfer from available funds, or borrow the necessary funds to pay costs of various capital projects, including, as applicable, equipping of capital items to be acquired, and all incidental and related costs for capital projects, all as described in the chart below:

Proj. No.	PROJECT TITLE	Administrator Recommended	CIC Recommended	Finance Committee Recommended	Funding Source
1	Rehabilitation of Abbott Park	\$208,885	\$208,885	\$208,885	\$100,000 Grant + \$108,885 GF Borrowing
2	Repairs to Town Hall Garage	\$100,000	\$100,000	\$100,000	General Fund Borrowing
3	Lead Service Investigation	\$164,000	\$164,000	\$164,000	State Grant (100%)
4	Recreation Sailboats & SUP	\$40,641	\$40,641	\$40,641	General Fund Borrowing

PROPOSED FUNDING	Administrator Recommended	CIC Recommended	Finance Committee Recommended
GENERAL FUND BORROWING	\$249,526	\$249,526	\$249,526
GRANT FUNDING (*)	\$100,000	\$100,000	\$100,000
GRANT FUNDING (*)	\$164,000	\$164,000	\$164,000
TOTAL FUNDING	\$513,526	\$513,526	\$513,526

Each numbered item will be considered a separate appropriation; with the budgeted amount to be spent only for the stated purpose; or take any action relative thereto.

Sponsored by the Capital Improvement Committee

Comment: The above projects were recommended for funding in FY2023 by the Capital Improvement Committee (CIC).

This Article requires a 2/3 vote for borrowing.

The Select Board recommends favorable action on this Article at Town Meeting.

The Finance Committee recommends favorable action on this Article at Town Meeting.

ARTICLE # 7 *APPROPRIATION FOR NEW ELEMENTARY SCHOOL*

To see if the Town will vote to raise and appropriate, borrow and/or transfer from available funds, a sum of \$2,909,983 to be expended under the direction of the School Building Committee for the design, construction and equipping of a new elementary school and costs incidental or related thereto, commonly referred to as the New Elementary School, located at 10 Whitman Road, Swampscott, Massachusetts, including the acquisition of easements therefor (the "Project"), which school facility shall have an anticipated useful life as an educational facility for the instruction of school children of at least 50 years, and for which the Town may be eligible for a school construction grant from the Massachusetts School Building Authority ("MSBA"). The MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any project costs the Town incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the Town. Any grant that the Town may receive from the MSBA for the Project shall not exceed the lesser of (1) forty-eight and nine-tenths percent (48.9%) of eligible, approved project costs, as determined by the MSBA, or (2) the total maximum grant amount determined by the MSBA, and, to meet said appropriation, to authorize the Treasurer, with the approval of the Select Board, to borrow all or a portion of said sum under the provisions of G.L. c. 44, §7 and/or any other enabling authority, and to issue bonds or notes of the Town therefor; or take any action relative thereto.

Sponsored by the Select Board

Comment: The purpose of this article is to appropriate funds in addition to the approved vote from Annual Town Meeting on September 13, 2021 Article #2 for a new elementary school.

This Article requires a 2/3 vote for borrowing.

The Select Board recommends favorable action on this Article at Town Meeting.

The Finance Committee will report on this Article at Town Meeting.

ARTICLE # 8 ACCEPTANCE OF PUBLIC WAY – SUPREME COURT

To see if the Town will vote to accept as a public way Supreme Court, as heretofore laid out by the Select Board, and shown on a plan of land entitled “Subdivision Plan of Land in Swampscott 14207-1”, dated February 3, 1987 prepared by Carter & Towers Engineering Corp., Surveyors, and on file with the Town Clerk; and to authorize the Select Board to acquire, by gift, purchase, and/or eminent domain, the fee to and/or easements in said public way for all purposes for which public ways are used in the Town of Swampscott and any drainage, utility and/or other easements related thereto, or take any action relative thereto.

Sponsored by the Planning Board

Comment: Accepting this street as a “Public Way” will allow the Town to assume responsibility for maintenance of this street, including snow removal, paving, etc.

The Select Board recommends favorable action on this Article at Town Meeting.

The Finance Committee recommends favorable action on this Article at Town Meeting.

The Planning Board recommends favorable action on this Article at Town Meeting.

A majority vote is required to approve this Article.

ARTICLE # 9 ACCEPTANCE OF DONATED LAND—PARK SQUARE

To see if the Town will vote to authorize the Select Board to acquire, by purchase, gift or eminent domain, a fee simple interest in property located at 32 Park Square, Swampscott, being Assessor’s Tax Map 10-40-0, containing 0.303 acres, more or less, and shown as Lots 13, 14 and 15 on a plan recorded with the Essex South District Registry of Deeds in Book 1421, Page 600, said plan on file with the Town Clerk, together with any improvements thereto, for general municipal purposes, including, but not limited to, open space, conservation and active recreational purposes; and, further, to authorize the Select Board to enter into all agreements and execute any and all instruments on behalf of the Town as may be necessary or appropriate to effectuate said acquisition, or take any action relative thereto.

Sponsored by the Select Board

Comment: This article seeks authorization to acquire property located at 32 Park Square for general municipal purposes, including, but not limited to, open space, conservation, and active recreational purposes. This property will be acquired by donation. See Red parcel in appendix A.

The Select Board recommends favorable action on this Article at Town Meeting.

A majority vote is required to approve this Article at Town Meeting.

ARTICLE # 10 ACQUISITION OF LAND OFF CUSHING AVENUE

To see if the Town will vote to authorize the Select Board to acquire, by purchase, gift or eminent domain, a fee simple interest in property located at Cushing Avenue, Swampscott, being Assessor's Tax Map 7, Lot 2, being a portion of that land described in a deed recorded with the Essex South District Registry of Deeds in Book 30764, Page 493, shown on a plan entitled "Plan of Land Town of Swampscott Archer Street Map 7, Lots 2, 213-248 and Lots 250-255," said plan on file with the Town Clerk; and, further, to authorize the Select Board to enter into all agreements and execute any and all instruments on behalf of the Town as may be necessary or appropriate to effectuate said acquisition, or take any action relative thereto.

Sponsored by the Select Board.

Comment: At the 2022 Special Town Meeting Article #1, Town Meeting voted to acquire several parcels. Due to a Scribner's error, Assessor's Tax Map 7, Lot 2 was inadvertently omitted. This Article corrects that error. Please see the blue parcel in Appendix A.

The Select Board recommends favorable action on this Article at Town Meeting.

SELECT BOARD:

J. Neal Puffy

Walt

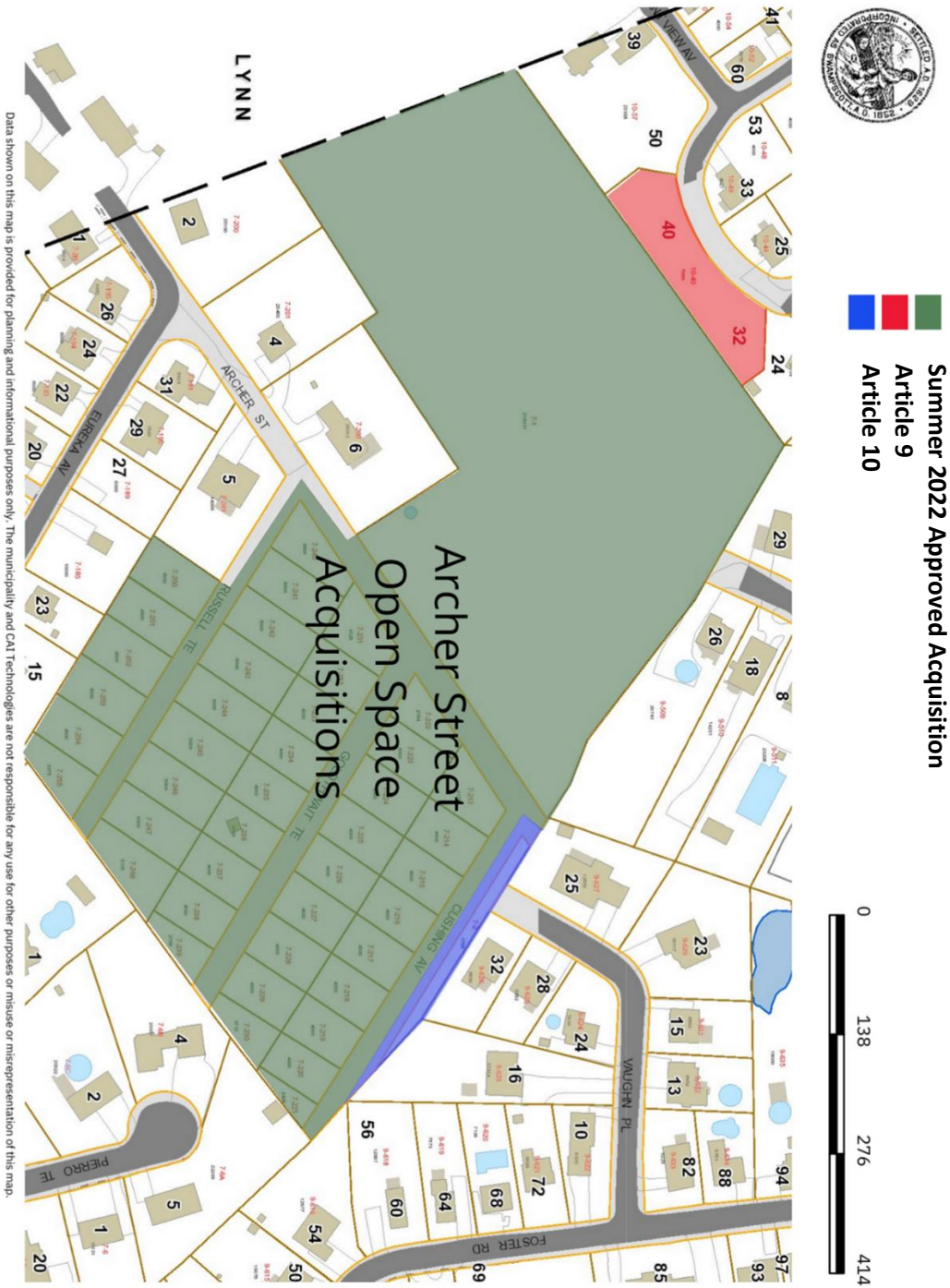
Maryann Fletcher

Pat

Pull

APPENDICES

APPENDIX A – ARCHER STREET ACQUISITION MAP



APPENDIX B – DEFINITION OF FINANCIAL TERMS COMMONLY USED AT TOWN MEETINGS

Appropriation – An authorization by the Town Meeting to make expenditures and incur liabilities for specific purposes. An appropriation is usually limited in amount and as to the time when it may be expended.

Assessed Valuation – A valuation set upon real estate or other property by the Assessors as a basis for levying taxes.

Available Funds – See free cash.

Bond – A written promise to pay a specified sum of money by a fixed date and carrying with it interest payments at a fixed rate, paid periodically. A **Note** is similar but issued for a shorter period.

Cherry Sheet – A State form which shows an estimate of all of the State and County charges and reimbursements to the Town.

Debt and Interest – The amount of money necessary annually to pay the interest and the principal on the Town's outstanding debt. Also known as "Debt Service."

Fiscal Year – The budget period used by the Town running from July 1 of one year to June 30 of the next year. At the end of this period, the Town closes its books in order to determine its financial condition and the results of its operation.

Free Cash – The amount of money left after all prior years' uncollected taxes have been deducted from surplus revenue. This amount may be used as available funds by vote of the Town Meeting.

Overlay – The amount, up to 5% of the tax levy, raised by the Assessors in excess of appropriations and other charges to cover abatements and exemptions.

Overlay Reserve – Unused amount of the overlay for previous years, which the Town may transfer to Surplus Revenue after all abatements for such fiscal year are settled.

Receipts – The cash, which is actually received by the Town.

Reserve Fund – A fund voted by the Annual Town Meeting and controlled by the Finance Committee for extraordinary and unforeseen expenditures incurred by Town departments during the year.

Stabilization Fund – Special Reserve Fund that can be used by a 2/3 vote of the Town Meeting.

Surplus Revenue – The amount by which cash, accounts receivable and other assets exceed the liabilities and reserves. Used in calculating free cash.

Transfer – The movement of funds from one account to another. Transfers between accounts (other than the Reserve Fund) can be made only by vote of the Town Meeting.

Unexpended Balance – That portion of an appropriation or account not yet expended. Any such balances left at the end of the fiscal year are generally used as Surplus Revenue in calculating Free Cash.

APPENDIX B – TABLE OF MOTIONS

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TABLE OF BASIC POINTS OF MOTION

Rank		Second Required	Debatable	Amendable	Vote Required	May Reconsider	May Interrupt
PRIVILEGED MOTIONS							
1	Dissolve or adjourn sine die	Yes	No	No	Maj.	No	No
2	Adjourn to fix time or recess	Yes	Yes	Yes	Maj.	No	No
3	Point of no quorum	No	No	No	None	No	No
4	Fix the time to (or at) which to adjourn	Yes	Yes	Yes	Maj.	Yes	No
5	Question of privilege	No	No	No	None	No	Yes
SUBSIDIARY MOTIONS							
6	Lay on the table	Yes	No	No	2/3	Yes	No
7	The previous question	Yes	No	No	2/3	No	No
8	Limit or extend debate	Yes	No	No	2/3	Yes	No
9	Postpone to a time certain	Yes	Yes	Yes	Maj.	Yes	No
10	Commit or refer	Yes	Yes	Yes	Maj.	Yes	No
11	Amend (or substitute)	Yes	Yes	Yes	Maj.	Yes	No
12	Postpone indefinitely	Yes	Yes	No	Maj.	Yes	No
INCIDENTAL MOTIONS							
*	Point of order	No	No	No	None	No	Yes
*	Appeal	Yes	Yes	No	Maj.	Yes	No
*	Division of a question	Yes	Yes	Yes	Maj.	No	No
*	Separate consideration	Yes	Yes	Yes	Maj.	No	No
*	Fix the method of voting	Yes	Yes	Yes	Maj.	Yes	No
*	Nominations to committees	No	No	No	Plur.	No	No
*	Withdraw or modify a motion	No	No	No	Maj.	No	No
*	Suspension of rules	Yes	No	No	2/3***	No	No
MAIN MOTIONS							
None	Main Motion	Yes	Yes	Yes	Var.	Yes	No
**	Reconsider or rescind	Yes	**	No	Maj.	No	No
None	Take from the table	Yes	No	No	Maj.	No	No
None	Advance an article	Yes	Yes	Yes	Maj.	Yes	No

* Same rank as motion out of which they arise.

** Same rank and debatable to same extent as motion being reconsidered.

*** Unanimous if rule protects minorities; out of order if rule protects absentees.

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**TOWN OF SWAMPSCOTT
MASSACHUSETTS
2022-2023**

<u>SELECT BOARD</u>	<u>TERM EXPIRES</u>
Neal Duffy, Chair	2023
David Grishman, Vice Chair	2023
Peter Spellios	2024
MaryEllen Fletcher	2025
Katie Phelan	2025

PROFESSIONAL STAFF

Sean Fitzgerald, Town Administrator
Gino Cresta, Assistant Town Administrator (Operations)
S. Pete Kane, Assistant Town Administrator
Amy Sarro, Director of Finance & Administration
Patrick Luddy, Treasurer/Collector
Dianne Marchese, Administrative Assistant to Select Board

<u>FINANCE COMMITTEE</u>	<u>TERM EXPIRES</u>
Eric Hartmann – Chair, At-Large (P1)	2024
Matthew Kirschner – Vice Chair, Precinct 1	2024
Joan Hilario – At-Large (P1)	2024
Cinder McNerney – Precinct 4	2023
Naomi Dreeben – Precinct 3	2022
Erik Schneider – Precinct 5	2022
Suraj Krishnamurthi – Precinct 6	2023
Sunit Shah – At-Large (P3)	2023



Informational Guideline Release

Bureau of Municipal Finance Law
Informational Guideline Release (IGR) No. 22-14
July 2022

Supersedes IGR 02-101 and Inconsistent Prior Written Statements

PROPOSITION 2½ DEBT EXCLUSIONS

(G.L. c. 59, §§21C(k) and 21D)

This Informational Guideline Release explains the policies of the Commissioner of Revenue regarding the borrowing amount covered by an approved Proposition 2½ debt service exclusion. It also includes new procedures and forms to be used by cities and towns with approved debt exclusions for obtaining a determination about the inclusion of cost increases.

Topical Index Key:

Borrowing
Proposition 2½

Distribution:

Assessors
Treasurers
Accountants/Auditors
Mayors/Selectmen
City/Town Managers/Exec. Secys.
Finance Directors
City/Town Councils
City Solicitors/Town Counsels
Municipal/Regional School Superintendents
Regional School Treasurers

Supersedes IGR 02-101 and Inconsistent Prior Written Statements

PROPOSITION 2½ DEBT EXCLUSIONS

(G.L. c. 59, §§21C(k) and 21D)

SUMMARY:

Under Proposition 2½, a city or town may present a debt exclusion referendum to voters. An approved debt exclusion provides a temporary increase in the amount the community can levy to fund the payment of debt service costs. Each year until the described debt is retired, the amount of the debt service payment due for that year is added to the levy limit to establish the maximum amount the community can levy.

Debt exclusions are usually for major construction projects and often the details and costs change as the projects progress. Even though a dollar amount is not included in the referendum question approved by the voters for these projects, the exclusion is not unlimited and does not necessarily cover all cost increases. An exclusion covers the debt service costs on the borrowing amount authorized or contemplated for the described purpose or purposes at the time of the referendum vote. Debt service on any borrowing above that fixed amount is not excluded unless (1) it is a modest amount attributable to inflation, new regulatory requirements or minor project changes, or (2) another exclusion is approved by the voters.

To that end, the Director of Accounts will determine the borrowing amount covered by a debt exclusion using the standards and procedures set forth in these guidelines.

I. GUIDELINES

A. Determination Policy

A city or town that increases the amount borrowed for a purpose described in a debt exclusion above the amount fixed at the time the exclusion referendum was approved may apply to the Director of Accounts for a determination regarding the borrowing amount covered by that particular exclusion.

B. Application Procedure

1. Applicant

The mayor, city/town manager or selectboard must submit the community's application for a determination regarding the scope of a particular exclusion.

2. Format

All applications must be made using Form DE-2 (attached). The form must be signed by the city council president and mayor or city manager, if applicable, or majority of the selectboard. There must also be submitted a certified copy of a vote taken by the city council or selectboard in public session indicating acceptance of the architect's, cost estimator's or owner's project manager's (OPM) report. Said report must be submitted with the DE-2 application.

This form will also be used to notify the community of the action taken by the Director on the request.

3. Content

The architect's, cost estimator's or OPM's report must provide the following:

- a) A letter from the architect, cost estimator or OPM detailing the circumstances for the cost increase;
- b) A report showing original project costs by major category at the time of the original debt exclusion vote with revised costs by major category (the variance should approximate the requested increase amount);
- c) An analysis of inflationary circumstances currently impacting the project cost;
- d) A statement from the architect, cost estimator or OPM indicating that the cost increase is not related to a change in scope from the project originally approved by the electorate at the time the debt exclusion was approved; and
- e) A statement from the architect, cost estimator or OPM detailing any changes made since the project was originally approved to reduce the cost of the same.

Applications must include a specific dollar amount of additional borrowing the community has or is planning to authorize for the purpose or purposes described in the debt exclusion. The Director will not act on requests for indefinite amounts nor pre-authorize an amount. All determinations will be based on a fixed dollar amount specifically provided by the community.

4. Submission

Applications must be emailed to the Director at the email address on Form DE-2.

C. Determination Decisions

1. Standards

Additional borrowing the community has or is planning to authorize for the purpose or purposes described in the debt exclusion will be covered by the exclusion only if:

- a) The new borrowing is within the scope of the relevant debt exclusion. A debt exclusion includes only the debt service costs attributable to the

amount of debt authorized for the specified project at or about the time the voters approved the exclusion, as well as any modest and reasonably foreseeable increases in such debt service intended to account for inflation, regulatory requirements or minor project changes. Other increases in debt service costs for the project are not covered by the exclusion;

- b) The city council and mayor or city manager, if applicable, or selectboard accepts the architect's, cost estimator's or OPM's report, as described above, by a majority vote in public session, and the community requests a determination by the Director of Accounts regarding the scope of the particular exclusion; and
- c) The architect's, cost estimator's or OPM's report contains the information in I. B. 3. noted above.

No additional exclusion amount will be approved related to voluntary changes or expansions in the fundamental specifications of the project as represented to the voters. Examples of such material project changes would include (1) adding new components or amenities, such as air-conditioning, (2) expanding significantly the size or use of a facility or structure, or (3) replacing rather than repairing a major structural component, such as a roof, or demolishing and rebuilding, rather than renovating, a structure.

The community must request a determination if all or part of the borrowing will cover extra work or expenses resulting from involuntary circumstances.

Alternatively, the community may choose to bypass the determination procedure altogether and seek voter approval of a supplemental exclusion or fund the additional debt service within the levy limit.

2. Notice

The Director will return the signed DE-2 to municipal officials to notify them of the decision.

3. Decision

a) Additional Borrowing Covered by Exclusion

If the Director determines that the additional borrowing identified by the city or town in its application is covered by the exclusion, that amount will be recorded on the DE-2.

b) Additional Borrowing Not Covered by Exclusion

If the Director determines that the additional borrowing identified by the city or town in its application is not covered by the exclusion, the DE-2 will record the exclusion amount fixed at the time of the referendum.

c) Approval of Supplementary Exclusions

The selectboard, town council or city council with mayoral approval if required by law may ask voters to approve another debt exclusion to cover the additional borrowing even if the Director determines the amount is covered by the original exclusion. The community also retains the option of bypassing the determination procedure entirely and either seeking voter approval of a supplementary exclusion or funding the additional debt service within the levy limit.

Voter action on a supplementary exclusion does not affect the original exclusion. Proposition 2½ does not contain any method for revoking or superseding an approved exclusion. Therefore, the original exclusion continues to cover the debt service costs on the borrowing fixed at the time it was voted.

If a supplementary exclusion required to cover the additional debt is not presented to or approved by the voters, the annual exclusion will be calculated on a percentage basis. For example, if the exclusion covered \$20,000,000 of \$25,000,000 borrowed for the exclusion purposes, the annual exclusion would be 80% of the net debt service due for the year.

4. Recordkeeping

Treasurers must retain the returned application until the debt exclusion ends, i.e., until the debt is retired and all adjustments to the levy limit attributable to the exclusion have been made.

**DETERMINATION OF BORROWING
COVERED BY DEBT EXCLUSION**

G.L. c. 59, §21C(k)

APPLICATION FROM CITY/TOWN OF SWAMPSCOTT

Application Date 11/30/2022

Email Form to:
Deborah A. Wagner
Director of Accounts
wagnerd@dor.state.ma.us

INSTRUCTIONS: Provide **ALL** information requested.

A. AUTHORIZED SIGNATURES. Must be signed by city council president and mayor or city manager or majority of the selectboard. Signature certifies that all information is true and correct.

Name	Title	Date

B. CONTACT. Provide **name** and **telephone number** of person to contact if additional information is needed to process this application.

Patrick Luddy, Treasurer/Collector (781) 596-9553

YOU MUST ALSO COMPLETE SECTIONS C, D AND E

DOR USE ONLY

FOR COMMISSIONER OF REVENUE

Base exclusion:

\$ _____

Director of Accounts

Additional debt approved:

\$ _____

Date: _____

Total debt covered by debt exclusion:

\$ _____

C. DEBT EXCLUSION. Answer the following questions and **attach** a certified copy of the referendum vote.

1. When did voters approve the debt exclusion? 10 / 19 / 2021
2. At the time of that election, how much did voters expect the project(s) described in the exclusion to cost? If the exclusion covers debt issued by a regional district, state district-wide cost, not city/town share. \$ 97,461,523
3. What was the basis for that expectation?
 - Borrowing voted before election
 - If yes, was borrowing voted *expressly* contingent upon passage of debt exclusion in accordance with G.L. Ch. 59 §21(m)?
 - Yes No
 - Borrowing scheduled for vote after election
 - Other. Specify:

D. DEBT AUTHORIZATIONS. List in chronological order **all** authorized/proposed debt for same purpose(s) as the debt exclusion. If the exclusion covers debt issued by a regional district, list debt authorized/proposed by the district, not city/town share.

	<u>Date Authorized/Proposed</u>	<u>Amount Authorized/Proposed</u>
1.	<u>05</u> / <u>21</u> / <u>2018</u>	\$ <u>750,000</u>
2.	<u>03</u> / <u>01</u> / <u>2021</u>	\$ <u>165,000</u>
3.	<u>09</u> / <u>13</u> / <u>2021</u>	\$ <u>97,461,523</u>
<u>TOTAL DEBT AUTHORIZED/PROPOSED</u>		\$ <u>101,296,506</u>

Continue list on attachment, in same format, as necessary.

*12/05/2022 \$2,909,983

E. EXCLUSION COVERAGE. Please provide a copy of the following documents:

1. The architect's, cost estimator's or OPM's report which details the following:
 - a) A letter from the architect, cost estimator or OPM detailing the circumstances for the cost increase;
 - b) A report showing original project costs by major category at the time of the original debt exclusion voted with revised costs by major category. The variance should approximate the requested increase amount;
 - c) An analysis of inflationary circumstances currently impacting the project cost;
 - d) A statement from the architect, cost estimator or OPM indicating that the cost increase is not related to a change in scope from the project originally approved by the electorate at the time the debt exclusion was approved; and
 - e) A statement from the architect, cost estimator or OPM detailing any changes made since the project was originally approved to reduce the cost of the same.
2. A certified copy attached of the vote taken by the council with mayor or city manager assent, if applicable, or selectboard in public session, indicating acceptance of the architect's, cost estimator's or owner's project manager's (OPM) report.

I attest that we accept the architect, cost estimator or OPM's report detailing the categories and reasons for project cost increases. I further attest that the increased project costs are not related to project scope changes.

Chair, Selectboard/Council President

Date



Town of Swampscott

Office of the

Town Administrator

Elihu Thomson Administrative Building
22 Monument Avenue
Swampscott, MA 0190

Tel: (781) 596-8850

Email: sfitzgerald@swampscottma.gov

Sean R. Fitzgerald
Town Administrator

TO: SELECT BOARD
FROM: DIANNE MARCHESE, EXEC. SECRETARY TO TA & SB
SUBJECT: 2022 BOARD AND COMMITTEE APPOINTMENTS
DATE: NOVEMBER 30, 2022

OBJECTIVE

The Select Board must reappoint Swampscott's 2022 Boards, Committees, and Commissions.

PROCESS

1. All current members up for reappointment were contacted to determine their interest in being reappointed
2. All Board Chairs were approached to confirm their support of reappointing members
3. A vacancy review was performed along with all current outstanding applications for committees to determine if there were any applicants who could potentially be considered in replacement of an existing member up for reappointment.

SAMPLE MOTION:

The Select Board, consistent with the recommendation of the Town Administrator, appoint individuals recommended in this memo for their appointed terms for the 2022-2023 term.

2022 REAPPOINTMENT SUMMARY

Committee	# of members	# of vacant seats	# of Terms Expiring 2022	# Seeking Reappointment or new 2022	# Not seeking reappointment	Non-Responsive or Pending
Tree Committee	9	1	0	1	0	0
War Memorial Scholarship Fund	8	2	0	2	0	0

TREE COMMITTEE

The Tree Committee, in coordination with the Town's Tree Warden protects and promotes the health of the Town's public trees and plans the planting of new trees to improve diversity and expand the Town's tree canopy.

- The Committee is comprised of eight members and one ex-officio
- There are no expiring terms
- **The Town Administrator recommends appointing one new member to fill a vacancy with a 3-year term expiring in 2025**

Gino Cresta	Ex-Officio	None	None
Brian Drummond	Member	3-year term	Term Expires 2025
Richard Frenkel	Member	2-year term	Term Expires 2024
Tara Gallagher	Member – Seat 7	3-year term	Term Expires 2025
Jennifer Honig	Member	2-year term	Term Expires 2024

Verena Karsten	Member	3-year term	Term Expires 2025
Ana Nenshati	Member	1-year term	Term Expires 2023
Jim Olivetti	Member	1-year term	Term Expires 2023
Robert Levy	Member	3-year term (25)	Seeking New Appointment

WAR MEMORIAL SCHOLARSHIP FUND COMMITTEE

- The Committee is comprised of eight members
- There are two vacancies on the board
- The Town Administrator recommends appointing two current ex-officio members as full members to fill vacancies with three-year terms expiring in 2024
- The Town Administrator recommends re-appointing one member for a term of 3-years expiring in 2025

Christopher Ratley	Member	3-year term	Term Expires 2024
Jean Reardon	Member	3-year term	Term Expires 2024
Martha Brine	Member	3-year term (25)	Seeking Re-Appointment
Douglas Maitland	Member	3-year term (24)	Seeking Appointment
Duncan Maitland	Member	3-year term (24)	Seeking Appointment
Susan Bishop	Member	3-year term	Term Expires 2024
Jody Watts	Member	3-year term	Term Expires 2024
Vacancy	Ex-Officio	None	None

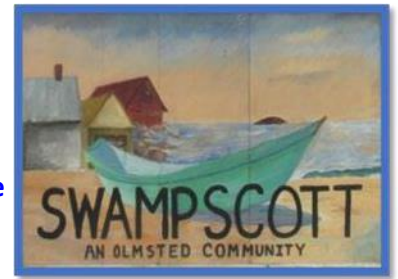


Town of Swampscott

Office of the

Town Administrator

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Sean R. Fitzgerald

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Swampscott Select Board
Town Administration Building
22 Monument Avenue
Swampscott, MA 01970

RE: NOVEMBER 30th REPORT TO THE SELECT BOARD

Dear Select Board:

I am pleased to be able to offer the following report on programs and initiatives that are on-going in the Town of Swampscott, as well as some updates on a variety of things that have happened since my last report.

ASSESSOR

Last week, the Board of Assessors set the new growth number for the Town. I did meet with Richard Simmons and Patrick Luddy last week to modern the tax levy with key assumptions. Like every other municipality that advances a significant project, Swampscott will see an increase in both the median and average single-family property this year.

The following table is a summary of the projected tax impact if we use a variety of allotments from the Town reserves:

Free Cash Options - 170% Shift														
Actual Levy %	Actual Levy	(b) %	(c) \$Budget (less Local Receipts)	(d) Valuation	CIP Shift	One-Time Funds Allocated	Residential Rate	Average Single Fam	Difference v 2022	Difference %	Median Single Fam	Difference v. 2022	Difference %	
8.1%	55,572,519	87.8891%	48,842,187	4,013,446,301	1.7	-	\$ 12.17	\$ 10,031	\$ 903	9.9%	\$ 8,347	\$ 780	10.3%	
6.7%	54,822,519	87.8891%	48,183,019	4,013,446,301	1.7	750,000	\$ 12.01	\$ 9,895	\$ 767	8.4%	\$ 8,235	\$ 668	8.8%	
6.2%	54,572,519	87.8891%	47,963,296	4,013,446,301	1.7	1,000,000	\$ 11.95	\$ 9,850	\$ 722	7.9%	\$ 8,197	\$ 630	8.3%	
5.7%	54,322,519	87.8891%	47,743,573	4,013,446,301	1.7	1,250,000	\$ 11.90	\$ 9,805	\$ 677	7.4%	\$ 8,159	\$ 592	7.8%	
5.2%	54,072,519	87.8891%	47,523,850	4,013,446,301	1.7	1,500,000	\$ 11.84	\$ 9,760	\$ 632	6.9%	\$ 8,122	\$ 555	7.3%	
4.7%	53,822,519	87.8891%	47,304,128	4,013,446,301	1.7	1,750,000	\$ 11.79	\$ 9,715	\$ 587	6.4%	\$ 8,084	\$ 517	6.8%	
4.2%	53,572,519	87.8891%	47,084,405	4,013,446,301	1.7	2,000,000	\$ 11.73	\$ 9,670	\$ 542	5.9%	\$ 8,047	\$ 480	6.3%	
3.7%	53,322,519	87.8891%	46,864,682	4,013,446,301	1.7	2,250,000	\$ 11.68	\$ 9,625	\$ 497	5.4%	\$ 8,009	\$ 442	5.8%	
3.3%	53,072,519	87.8891%	46,644,959	4,013,446,301	1.7	2,500,000	\$ 11.62	\$ 9,580	\$ 452	4.9%	\$ 7,972	\$ 405	5.3%	

We are looking at the type of significant increases in peer communities as they have taken on additional debt. What is important to not lose focus on is that we are acquiring over \$10M in Open Space, constructing a school for over \$100M.

We are still waiting on Free Cash Certification but hope to see this completed early in the week.

The BoA is reviewing applications for exemptions from potentially qualified seniors, seeing-impaired individuals, and veterans as well as requests for tax deferrals.

BUILDING DEPT.

This past week, I met with Swampscott's Building Commissioner Steve Cummings to discuss the ongoing work in the Inspectional Services Department. With a number of large residential development and the construction of the new elementary school, there is a significant uptick in activity in the Department.

The Building Department has issued 1,373 permits since January 1st of 2022, and has collected \$881,833.

SENIOR CENTER

This past week, I met with Heidi Weir and discussed a number of initiatives ongoing at the Center. We are eager to see the Community Cares Department advance and really start to synergize the services that can make a difference in connecting to those in need.

Additionally, the Senior Center's new website has gone live. You can check it out here: www.activeagingswampscott.com. This new & improved website is easy to navigate and has all of the information active seniors need in order to stay engaged. Senior Center knitters are hard at work setting up shop to sell hand knit hats, scarves, gloves, throws, baby blankets and more through this Friday. All proceeds fund Senior Center programs. For more information, to register for their many programs or for lunch, please visit their website.

RECREATION

The annual indoor Farmers Market and Town-wide Turkey Hunt were a success! For the second year in a row, our very own Phelan Family won!

Upcoming events include the annual gingerbread house contest, breakfast with Santa, the Holiday Festival and First Night! Please see www.swampscottrec.com for more information!

Additionally, for the first time, we are holding a Holiday Wreath Raffle at Town Hall from 11/29-12/1. One-of-a-kind wreaths will be raffled off on 12/1.

VETERANS

This past week, I joined Mike Sweeney as he and his wife Sarah passed out holiday meals for Swampscott and Lynn Veterans on Humphrey Street.

Additionally, if anyone is interested in buying a wreath for a veteran's grave, please visit contact Mike Sweeney at (781) 586-6911. Wreaths will be placed on veterans' gravestones on December 17th at 11:00 A.M.


Lastly, we will be dedicating a Gold Star Memorial for Jarrad Raymond is next Sunday, December 4th.

DPW

As usual, the DPW, including the three new team members (Ryan Squires, Brian Martin & Kevin McDonald), has been hard at work. Annual street line painting has been completed, native plantings at the new ADA compliant bus stop on Humphrey Street has been completed.

The DPW staff have installed a new stockade fence at the Fish House. Gino has also completed a comprehensive lead detection survey of the Town's water system in conjunction with Liston Utilities, finding seven leaks with an estimated loss of 200,000 GPD, the largest of which, at 87,000 GPD, has been repaired.

Respectfully Submitted,


Sean R. Fitzgerald
Town Administrator