
Revenue and Expenditure Task Force
Wednesday, April 28, 2021 8:00AM
WebEx Virtual Meeting

I. Call to Order

Chair Vaill called the meeting of the Revenue and Expenditure Task Force (RETF) to order at 8:00AM and initiated roll call. Present by video conferencing were Tim Vaill-Y, Joe Guilmartin-Y, Paul MacKay-Y, Tom Hartwell-Y and Kevin Connors-Y. Absent was Melissa Danisch. Also present were Patrick Lawlor, Assistant Town Manager and Finance Director Donna Walsh, The meeting was taped and live cablecast.

II. Approval of Minutes – February 18 and February 26, 2021

Upon motion duly made by Mr. MacKay and seconded by Mr. Connors, it was unanimously voted to approve the above minutes. Tim Vaill-Y, Joe Guilmartin-Y, Paul MacKay-Y, Tom Hartwell-Y and Kevin Connors-Y. Motion passed 5-0.

III. Communications and Public Outreach Workshop

Mr. Lawlor stated that one important charge of the Task Force was to lead the public outreach and enhance communications and engagement with residents on municipal finance and complex budget issues. Toward that effort, this workshop will explore best practices to accomplish that mission. Discussion ensued and included the following highlights:

- a) Integrated Financing Plan will be voted at Town Meeting, followed by ballot box vote at Town Election.
- b) Fundamental “architecture” of municipal finance system and town budget in general.
- c) Different networks/strategies of communications, including social media, news flash, etc.
- d) Difference between schools and town.
- e) Confusion around pension liability, OPEB liability and reform; understanding differences between town and school.
- f) Proposition 2 ½ - what is it?
 - i. Override – why do some towns do it all the time
 - ii. What is it – how is tax bill developed.
- g) Why did my tax bill go up?
- h) Levy limit.
- i) How is a tax bill actually developed.
- j) Simple/concise primer on municipal finance/ taxes.
- k) Visual learners - dialogue/recorded session.
- l) Budget/full accrual accounting – net worth.
- m) History of pension system – how does an unfunded liability grow.
- n) Definition of terms.
- o) Make it relatable – why does this matter to me?
- p) Start with how a tax bill is created.
- q) Ability to drill down for more information.
- r) Valuation and impact of the tax bill.

- s) Residential/commercial tax rates share of property.
- t) Average tax bill – tax rate.
- u) Assessed value and market value.
- v) Strategy for moving forward
 - i. Sub-group: develop an outline of what we want to communicate.
 - ii. Content and strategy.
- w) Goal: simple education on municipal finance 101; growth of engagement of residents, develop a tool for those who want to use it.

It was agreed that Mr. MacKay and Mr. Guilmartin meet with Mr. Lawlor and Ms. Walsh to draft an outline plan for implementing the above key points discussed above, and ways in which this material can be developed into visually appealing and effective educational outreach tools. The Finance Committee may want to be involved in this process.

Mr. Lawlor noted that the Town Manger is conducting forums on the Integrated Financing Plan through virtual presentations on Tuesday evenings and virtual office hours every Thursday at noon. He noted that the Town Manager adapts his presentation following resident feedback.

Mr. MacKay noted that pension reform will be considered at the Retirement Meeting tomorrow at 4:00PM.

IV. Next Meetings

Mr. Lawlor will circulate dates for next meetings.

V. Adjournment

Upon motion duly made by Mr. MacKay and seconded by Mr. Connors, it was unanimously voted to adjourn. Mr. Vaill-Y, Mr. MacKay-Y, Mr. Hartwell-Y and Mr. Connors-Y. Mr. Guilmartin had left the meeting. Motion passed 4-0. Meeting adjourned at 9:03AM.

Respectfully submitted,

Christine Martin Barraford
Recording Clerk