

Board of Selectmen Minutes
February 25, 2019
Slade Building

Members Present:

- Michael Stauder
- Jeff Williams
- Richard Haddad

Members Absent:

- Dan Galante
- Pat Girouard

Staff Present:

- Ryan McLane – Town Administrator
- Laurie Reed – Executive Administrative Assistant

Meeting opened at 6:34pm by Michael Stauder. Michael announced the meeting was being broadcast live and digitally recorded.

Announcements:

- Rabies Clinic, Saturday, March 2nd 1:30pm-3:00pm, Gardner Animal Shelter
- St. Patrick's Day Breakfast, March 16th 8am-10am, Senior Center
- Now accepting Country Hen scholarship applications, deadline to apply, April 30th

Open Session:

- None

New Business:

- **Streeter Road Culvert:** Deb Reed is present to discuss the concerns of the culvert from the last Board of Selectmen meeting. The pictures and letter from Sharon Begley and Ed Ternosky that were shown at the last meeting were reviewed and discussed. Deb advised the water is flowing and beaver debris is regularly removed by residents. A video was shown with water flowing in the culvert. Deb advised the Town will not be granted any water on the road, the Town will only own an easement. A topographical map was shown, showing drainage to 41 Grimes Road. Deb advised the Conservation Commission has tried to address the concerns of Sharon and Ed, however they have not attended the meetings. Peter, Streeter Road Resident and President of the Lovewell Pond Sporting Club noted the Club was not issued an order of conditions to maintain the culvert. The Club is not legally responsible for cleaning the culvert. To date, the residents have been addressing the culvert. Peter advised the attorney will need to structure an agreement on culvert maintenance if approved at town meeting.

Presentation (1 of 2)

- **New Municipal Building Options Discussion:** Ryan advised Greg from HK Architect Firm is present to discuss new municipal building options. Presentation reviewed and discussed. Greg advised he met with all departments involved for their feedback and needs. Three building options were reviewed to include; option 1: public safety, town hall and the senior center, option 2: public safety and town hall, option 3: a public safety building. Ryan advised all costs reviewed are all inclusive including furniture, paving, landscaping, etc. Questions of the Senior Center and town offices staying in the Slade Building were discussed. Ryan advised the Slade Building would need approximately 1.5-2 million in renovations and is unsure if the Slade Building would be large enough to hold all departments. Costs, funding and project timeline were discussed. Jeff advised he would not be behind a new building on the suggested property without a Senior Center attached and questioned the legalities of the land if anything other than a center were built on the property. Ryan advised he would seek grants and donations to help offset the costs. Building Maintenance, mechanical breakdowns, solar and energy costs reviewed. Next steps would be for the Board to decide if they would like to entertain any of the options.

New Business:

- **DLTA Application Approval:** Grant money from MRPC for help write two of the master plan chapters to include services and facilities and historic and natural resources. Ryan is looking for Board support on the application to seek grant funds.

Motion to entertain/approve the Montachusett Planning Commission DTLA: Richard Haddad, 2nd: Jeff Williams, Vote: All in Favor

- **Police Policies Review:** Ryan presented the Board with 3 additional police policies for review. The Board will vote at the next meeting to approve or waive. No action is needed at this time.
- **Hay Account Transfers:** Money was to be deposited in the Hubbardston Preservation account, however the money was deposited in other accounts. Ryan is looking for a vote to move the money to the correct account.

Move to transfer in fiscal 2019 \$1755 from Open Space Committee Donations to the Hubbardston Preservation Fund: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

Move to transfer in fiscal 2019 \$1755 from Selectmen's Miscellaneous to the Hubbardston Preservation Fund: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

- **Housing Production Plan Approval:** Ryan advised it was reviewed and updated in 2017. The Planning Board is working on the plan however it was never submitted to the State. Alice and Tom are looking to submit the plan with Board approval.

Motion to approve the Housing Production Plan as presented: Richard Haddad, 2nd: Jeff Williams, Vote: All in Favor

- **FY20 Wage Plan Approval:** Previously discussed in executive session, Ryan is looking for approval in open session.

Motion to Accept the classification grades for non-union personnel as presented: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

Presentations (2 of 2)

- **Town Administrator FY20 Proposed Budget:** Presentation reviewed to include Executive Budget Summary; Overall Budget, Town Departments, School Departments, Insurance & Indirect Costs, Debt Service, Capital Improvement Program, Warrant Articles, Revenues. Warrant articles reviewed to include Senior Tax work-off and cemetery equipment. General Government reviewed to include Public Safety, Growth Management, Education, Public Works & Cemeteries, Residential Services, indirect costs. Capital Budget, Debt Service, Town Reserves and Updated Financial Forecast discussed. The Finance committee will meet of April 27th to discuss the budget, a public hearing will be held on the 23rd and vote on the 29th.

Old Business:

- **Library Roof Contract:** Ryan advised the contract is as proposed and previously discussed. Contract has been vetted by Town Council. Ryan is looking for Board approval for Ryan to sign to the contract to start the project.

Motion to Approve Ryan to sign the contract for the Library Roof: Richard Haddad, 2nd: Jeff Williams, Vote: All in Favor

Town Administrator Report:

- See Attached

Appointments:

- Change in appointment from Rep Donnie Berthiaume to James Berthiaume

Motion to correct/change appointment from Rep Donnie Berthiaume to James Berthiaume to the Memorial Day Committee: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

- Chuck Reed – Finance Committee

Motion to Appoint Chuck Reed to the Finance Committee: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

- Dave Conaghan – Capital Improvement Committee (No Vote)

Wage Authorizations:

- Donald Tardy, Part-Time MART Driver

Motion to waive the notification period for Donald Tardy, Part-Time MART Driver: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor

Committee Updates:

- **QEMP Task Force:** No Updates
- **Town Center Committee:** Ryan advised he and Jeff presented the town center plan to the MPO last Wednesday. Ryan stated it was a successful presentation with the project currently in FY24 as a placeholder with the ability to move up. 68 North will be bid this Spring with work to be starting in the fall and finalized in Spring of 2020.

Matters not reasonably anticipated by the Chair:

- Richard questioned the tree trimming on the common. Ryan advised the work has been completed.

Motion to Adjourn to Executive Session to discuss reason 1, the reputation, character, physical condition or mental health, rather than professional competence, of an individual, or discuss the discipline or dismissal of, or complains or charges against, a public officer, staff member or individual: Jeff Williams, 2nd: Richard Haddad, Roll Call Vote: Jeff: Yes, Michael: Yes, Richard: Yes.

Motion to Adjourn to Executive Session for reason 3, to discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body and the chair so declares: Michael Declares: New England Police Benevolent Association, Inc. Local 092 and Town of Hubbardston Police Department: Jeff Williams, 2nd: Richard Haddad, Roll Call Vote: Jeff: Yes, Michael: Yes, Richard: Yes

Motion to Adjourn to Executive Session for reason 7, to comply with the provisions of any general or special law or federal grant-in-aid requirements: Jeff Williams, 2nd: Richard Haddad, Roll Call Vote: Jeff: Yes, Michael: Yes, Richard: Yes

Move to adjourn to Executive Session with no intention to return to Open Session: Jeff Williams, 2nd: Richard Haddad, Vote: All in Favor 8:35pm

Respectfully submitted,
Laurie Reed

Approved 5.28.2019

BOARD OF SELECTMEN MEETING 2/25/2019

PLEASE PRINT CLEARLY

NAME	ADDRESS	PHONE #
Deb Reed	16 Streeter Rd	
Stephen Romano	13 Streeter Rd	
Blair Russell	20 Streeter Rd	
Alexis Vanchenko	HKA	
Ed Ternosky	41 Grimes Rd	
Walter Scott	7 Plum Tree Lane	
Nancy Afonso	33 High St.	
M. Shaughnessy	5 Kruse Rd.	
Mallory Lippman	121 Old Westminster Rd	
Philip Scott Jr.	2 Gardner Court off	

Gardner Animal Control Facility

899 West Broadway, Gardner, Ma 01440 978.630.4950

Rabies Clinic

@ The Gardner Shelter

\$20.00

per vaccine
Cash or Check Only
No Credit Cards

Saturday, March 2nd

1:30pm - 3pm

Servicing the Gardner Area

including:

- Cats must be in carriers
- Dogs must be on leash
- 3 yr Rabies available with proof of 1 yr vaccine
- Muzzle aggressive dogs
- No pets younger than 12 weeks
- Please advise us of any previous vaccine reactions

- Gardner
- Ashburnham
- Hubbardston
- Westminster

All Towns Welcome!



FREE MICROCHIP

*Donated by the
ACE-Central MA*

Sponsored by



73 Eaton St, Gardner, Ma 01440

978.632.7110



Join the Hubbardston Senior Center for
a St. Patrick's Day Breakfast!
Saturday, March 16th 8am–10am
7 Main Street, Hubbardston MA

MENU

- Scrambled Eggs
- Sausage
- Toast with butter or jelly
- Home Fries
- Coffee/Juice

Donations will be accepted and are
greatly appreciated!





TOWN OF
HUBBARDSTON
NEW MUNICIPAL CENTER

OWNER:
TOWN OF HUBBARDSTON
100 STATE STREET
HUBBARDSTON, MA 01432

ARCHITECT:
HELENE-KARL
ARCHITECT, LLC
100 STATE STREET
HUBBARDSTON, MA 01432

STAMP

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17/13/16		CONCEPT PLAN
18/17		CONCEPT PLAN

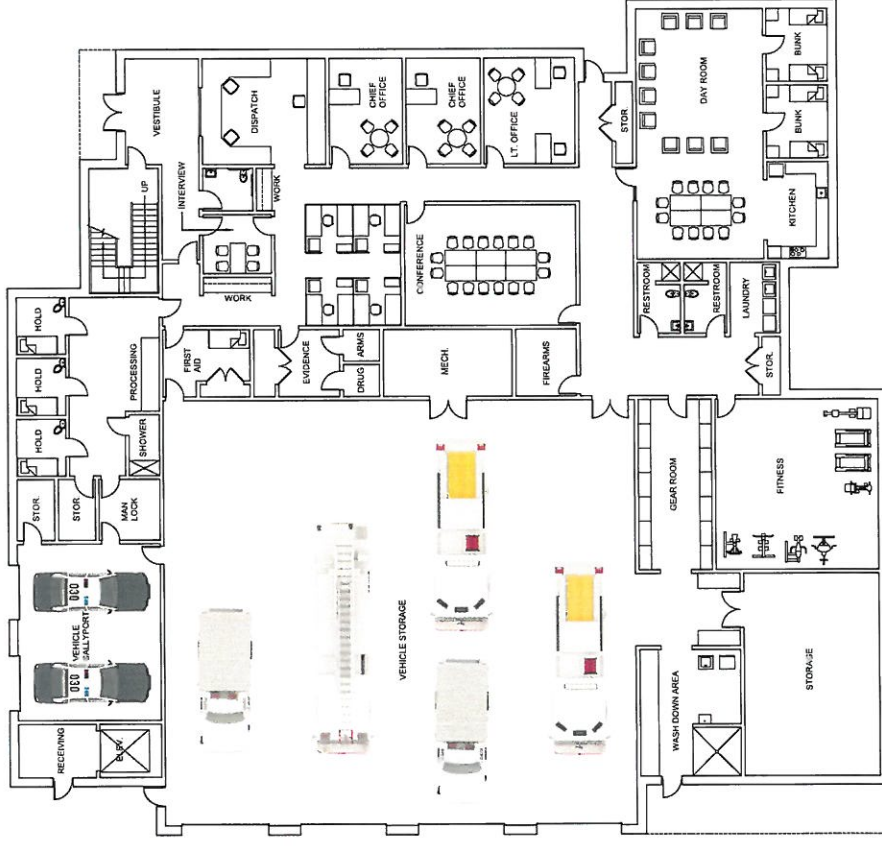
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18/17		HK	18/17
18/17		HK	18/17

PROJECT NO. 18011

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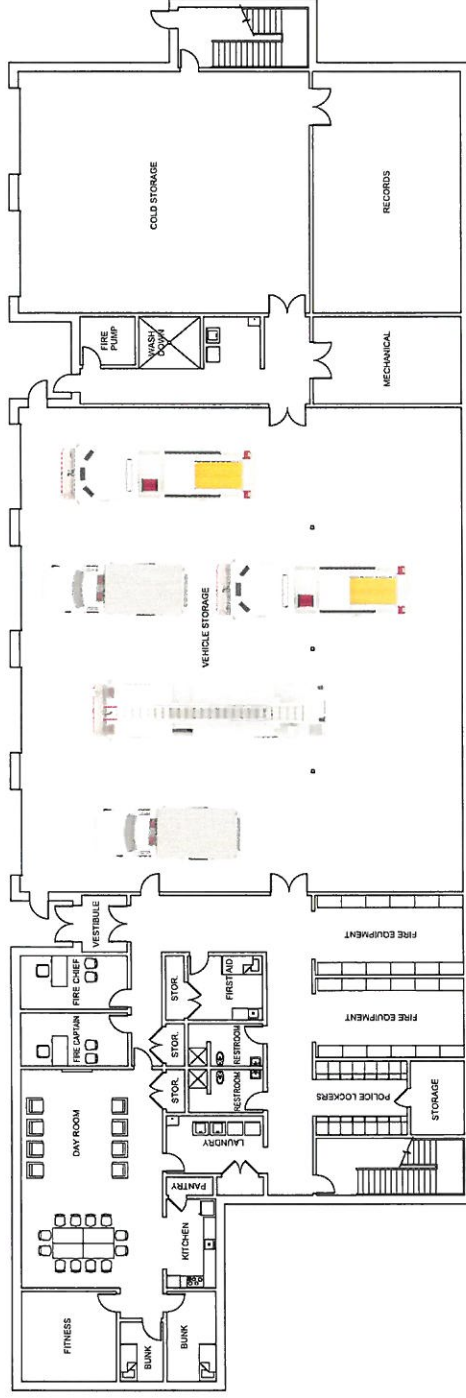
FIRST FLOOR PLAN

DRAWING NO.
A-101



1 FIRST FLOOR PLAN - 17,120 S.F.
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PROGRESS SET - NOT FOR CONSTRUCTION



1 FIRST FLOOR PLAN - 15,216 S.F.

STAYAS	
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[illegible]

DRAWING NO. A-101

MUNICIPAL CENTER - OPTION 1
TOWN HALL, PUBLIC SAFETY, SENIOR CENTER

PROGRESS SET - NOT FOR CONSTRUCTION



TOWN OF
HUBBARDSTON
NEW MUNICIPAL CENTER

OWNER:
TOWN OF HUBBARDSTON
7 MAIN STREET
HUBBARDSTON, MA 01452

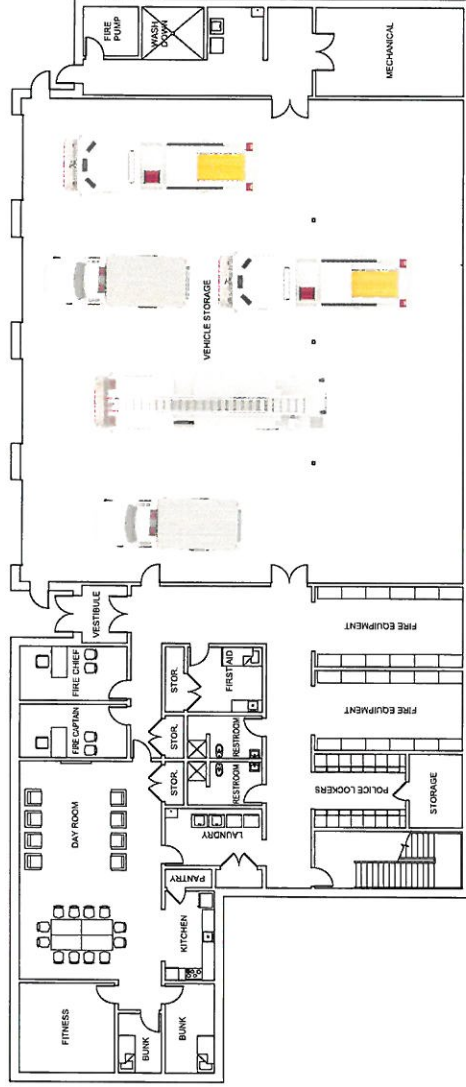
ARCHITECT:
HELENE KARL
ARCHITECT, PC
100 WASHINGTON STREET
HUBBARDSTON, MA 01452

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28/01/18		CONCEPT PLAN
12/12/18		CONCEPT PLAN
DATE		DESCRIPTION
DATE		
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CHECKED BY	DKT	
PROJECT NO.	18011	
REVISIONS		

SHEET TITLE:
FIRST FLOOR PLAN
OPTION 2

DRAWING NO.
A-101



1 FIRST FLOOR PLAN - 11,371 S.F.
SCALE 1/8" = 1'-0"

MUNICIPAL CENTER - OPTION 2
TOWN HALL, PUBLIC SAFETY

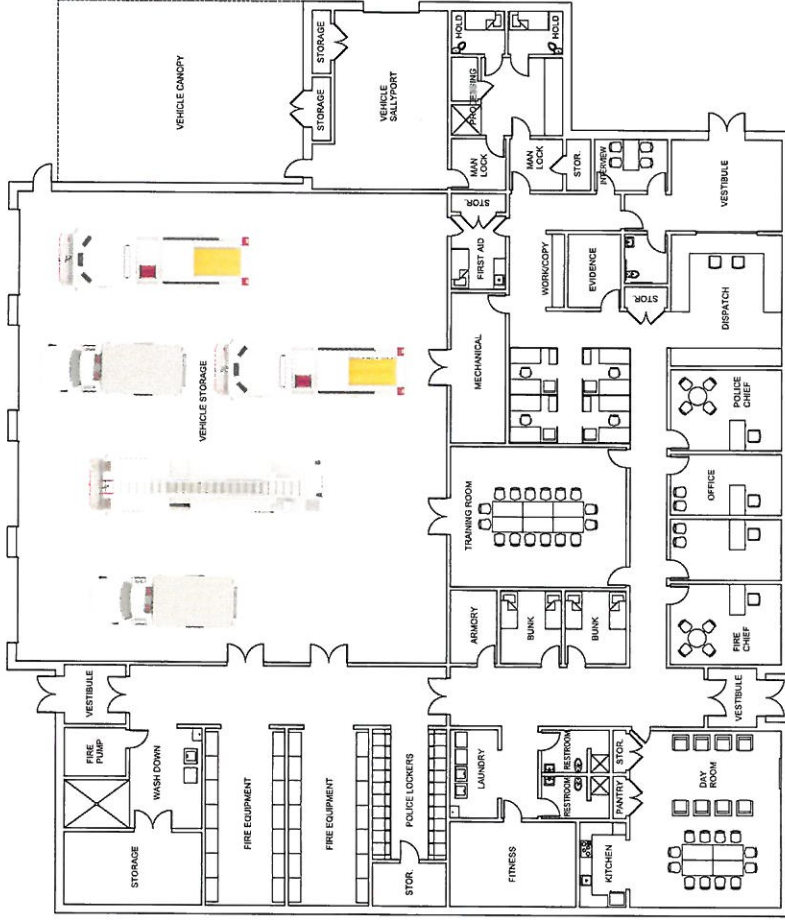
PROGRESS SET - NOT FOR CONSTRUCTION



TOWN OF
HUBBARDSTON
NEW MUNICIPAL CENTER

OFFICE:
TOWN OF HUBBARDSTON
HUBBARDSTON, MA 01452

ARCHITECT:
A HELENE KARL
ARCHITECTS, P.C.
1000 STATE STREET, SUITE 200
HUBBARDSTON, MA 01452



① FIRST FLOOR PLAN - 16,652 S.F.
SCALE 1/8" = 1'-0"

MUNICIPAL CENTER - OPTION 3
PUBLIC SAFETY

PROGRESS SET - NOT FOR CONSTRUCTION

A-101

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REVISION		
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2/8/19	CONCEPT PLAN	
12/13/18	CONCEPT PLAN	
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MTV		
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OKY		
PROJECT NO.		
10311		
REVISION		
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DATE		
DESCRIPTION		
SHEET TITLE:		
FIRST FLOOR PLAN		
OPTION 3		
DRAWING NO.		
A-101		



TOWN OF
HUBBARDSTON
NEW MUNICIPAL CENTER

OWNER:
TOWN OF HUBBARDSTON
100 STATE STREET
HUBBARDSTON, MA 01432

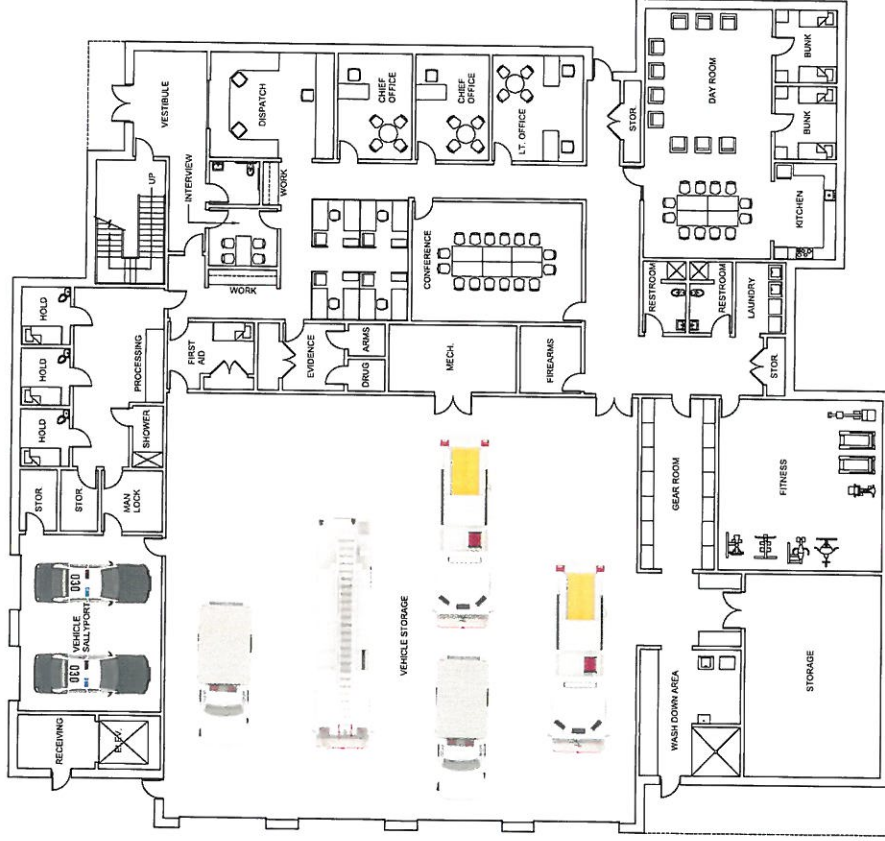
ARCHITECT:
HELENE + KARL
ARCHITECTS
20 FORTY-ONE
WILLOW STREET
HUBBARDSTON, MA 01432

STAMP

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2/28/19		CONCEPT PLAN
12/13/18		CONCEPT PLAN
DATE		DESCRIPTION
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PROJECT NO.	18011	
BUILDING		

SHEET TITLE:
FIRST FLOOR PLAN

DRAWING NO.
A-101



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PROGRESS SET - NOT FOR CONSTRUCTION



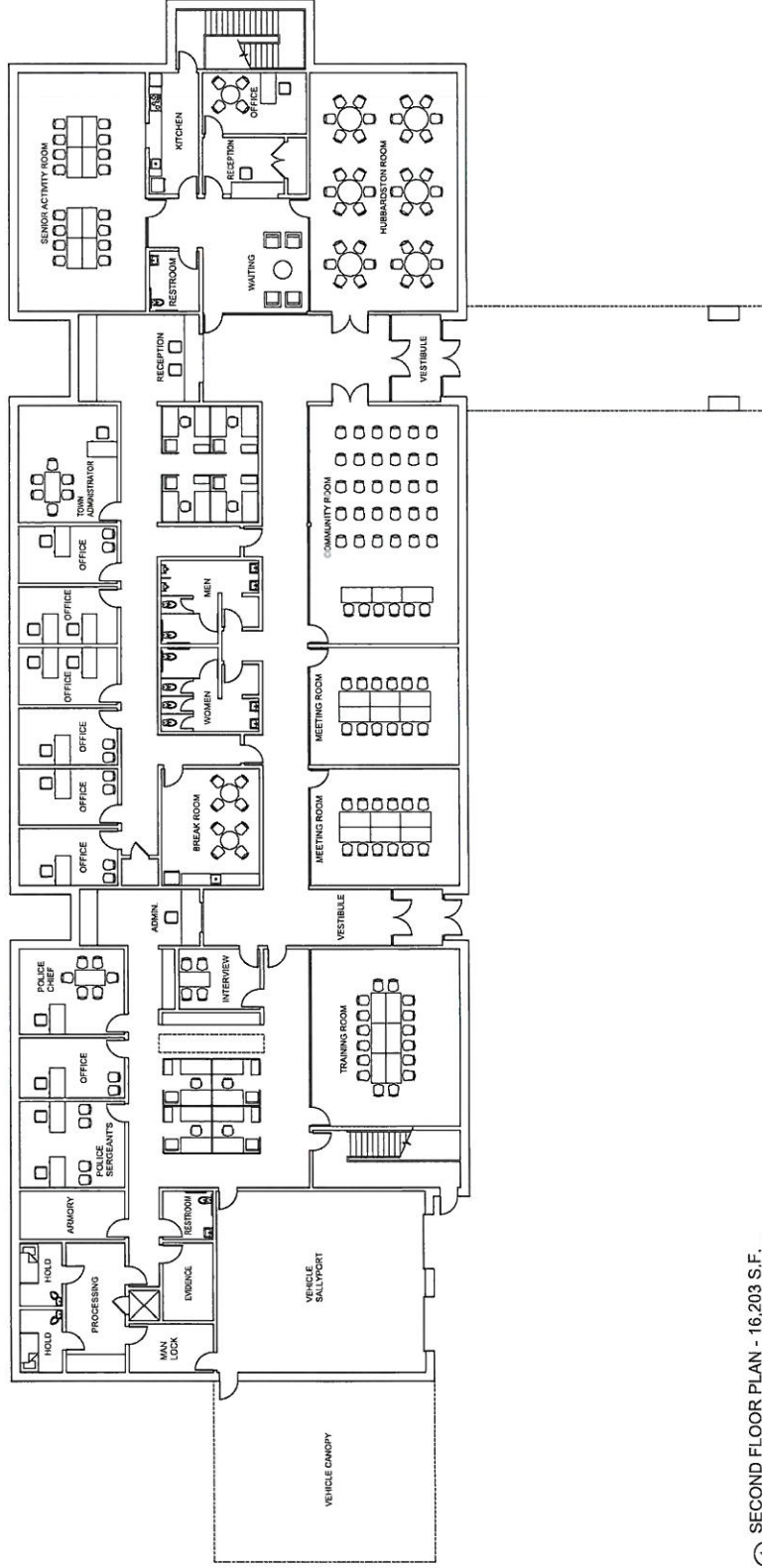
TOWN OF
HUBBARDSTON
NEW MUNICIPAL CENTER

OWNERS
TOWN OF HUBBARDSTON
7 MAIN STREET
HUBBARDSTON, MA 01442

ARCHITECT
HELENE-KARL
ARCHITECTS, P.C.
100 STATE STREET, SUITE 200
HUBBARDSTON, MA 01442

STAMP

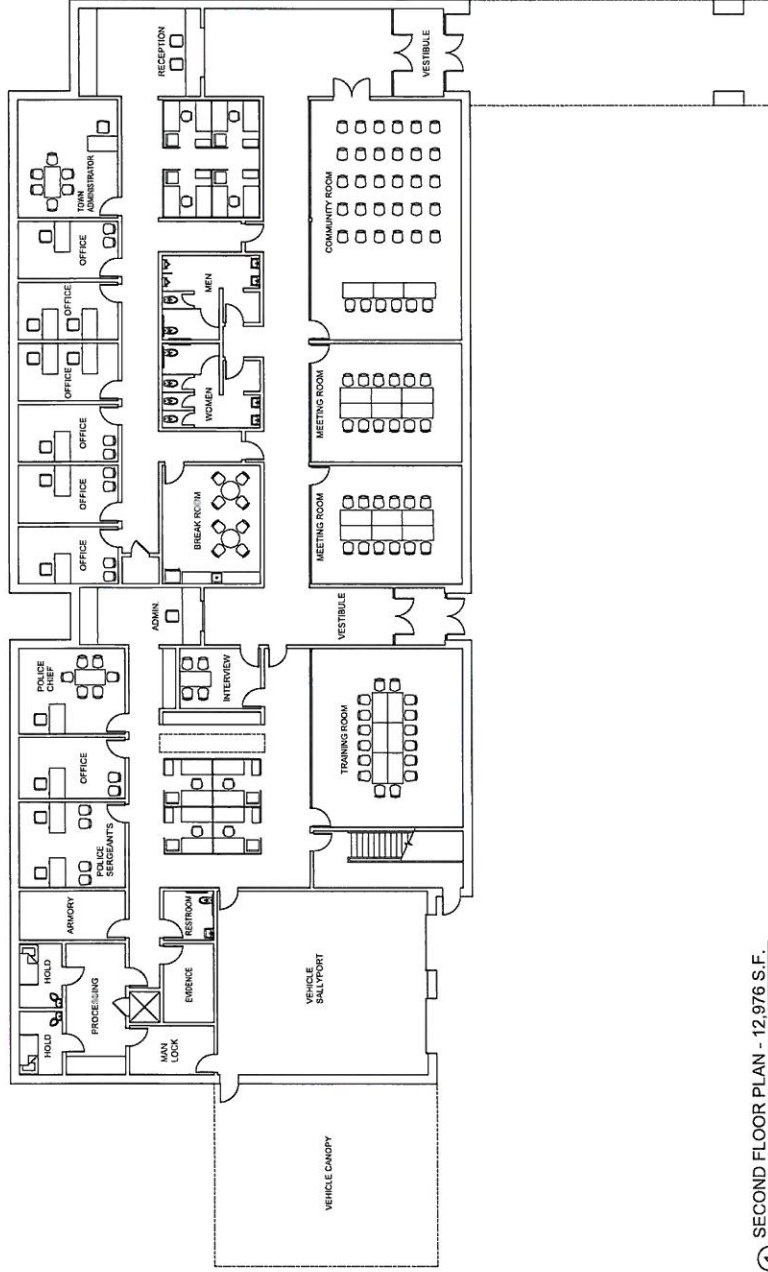
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CHECKED BY	DKY	
PROJECT NO.	19011	
SHEET TITLE	SECOND FLOOR PLAN OPTION 1	
DRAWING NO.	A-102	



① SECOND FLOOR PLAN - 16,203 S.F.
SCALE: 1/8" = 1'-0"

MUNICIPAL CENTER - OPTION 1
TOWN HALL, PUBLIC SAFETY, SENIOR CENTER

PROGRESS SET - NOT FOR CONSTRUCTION



1 SECOND FLOOR PLAN - 12,976 S.F.

[illegible]

MUNICIPAL CENTER - OPTION 2
TOWN HALL, PUBLIC SAFETY

[illegible]



Board of Selectmen

7 MAIN STREET
HUBBARDSTON, MASSACHUSETTS 01452
(978) 928-1400 x 200 FAX (978) 928-3392

To: Montachusett Regional Planning Commission
From: Hubbardston Board of Selectmen
Date: February 19, 2019
Subject: District Local Technical Assistance (DTLA) Application

The Town of Hubbardston is seeking District Local Technical Assistance (DTLA) from the Montachusett Regional Planning Commission (MRPC) for the completion of its Master Plan. Hubbardston last completed a full update its Master Plan more than 40 years ago. Recently, the town has invested in completing chapters on Economic Development and Open Space; however, more work is needed to make the plan complete.

The Hubbardston Planning Board met this month to discuss continued Master Plan efforts and voted to request DTLA assistance for its historical and cultural resources chapter and its service and facilities chapter. This assistance would allow the Planning Board to continue to move the Master Plan forward and set up the likelihood of a completion date in 2020.

The Hubbardston Board of Selectmen fully supports this request and voted at their public meeting on February 19, 2019 to forward this application and attached proposal to the MRPC for DTLA considerations.

Thank you for your continued effort on behalf of Hubbardston. We look forward to continuing our relationship with the commission.

Sincerely,

Dan Galante
Chairman
Hubbardston Board of Selectmen



Proposal

The Town of Hubbardston is seeking District Local Technical Assistance (DTLA) from the Montachusett Regional Planning Commission (MRPC) for the completion of its Master Plan. A Master Plan is a community's general "blueprint" for its future, guiding regulatory changes, land use policies, budgeting decisions, and the rest of the community decision making. It can help to direct decision making on the community's long-term physical development over a period of decades or even generations. Hubbardston last completed a full update its Master Plan more than 40 years ago. Recently, the town has invested in completing chapters on Economic Development and Open Space; however, more work is needed to make the plan complete.

More specifically, this proposal seeks DTLA funds for the completion of two Master Plan chapters. First, the town would like to work with MRPC on a historical and cultural resources chapter. Hubbardston takes enormous pride in an identity derived from its natural and cultural resources and history. The town's character is defined by a rural landscape with high aesthetic value that accommodates natural, wildlife, and recreational areas as well as agricultural activities. The community is actively engaged in efforts to preserve these areas and protect them from development. The Town is also home to a rich cultural environment as evidenced by its many volunteer organizations, its active cultural council and its investment of time and energy into its special events planning.

Additionally, this proposal seeks DTLA funds to work with MRPC on a services and facilities chapter. Hubbardston would like to evaluate its town services and infrastructure. It is vital for a small town like Hubbardston to evaluate its service levels in order to continue to provide high-quality services including police, fire, public education, libraries, and social services, among others despite limited resources. Alternative funding sources and creative partnerships need to be pursued to ensure that these services continue to meet the high standards of community members. Infrastructure is also vital to every community, especially a small town like Hubbardston. Planning for future infrastructure spending allows Hubbardston to wisely invest funds for maximum impact.

This project qualifies as an eligible project under the Planning Ahead for Growth category, specifically by helping Hubbardston develop components of a revised municipal master plan and providing technical assistance that supports the implementation of strategies which are designed to advance well-planned growth and development policies and practices. Hubbardston is keenly aware of its potential for growth and although it welcomes smart and sustainable growth, the town would like to maintain its unique rural character and commitment to agriculture and open space with a well-developed and instructive master plan.

INTERROGATING SUSPECTS AND ARRESTEES

POLICY & PROCEDURE NO. 1.13	ISSUE DATE:
	EFFECTIVE DATE:
MASSACHUSETTS POLICE ACCREDITATION STANDARDS REFERENCED: 1.2.3(b); 42.2.1(b); 42.2.3(b); 42.2.10	REVISION DATE:

I. GENERAL CONSIDERATIONS AND GUIDELINES

Interrogations of persons in police custody must conform to the standards set forth in the *Miranda* decision as well as Due Process. A suspect must "knowingly and intelligently" waive his/her rights to this constitutional protection before the interrogation can begin.

The critical elements to be considered are whether there is a coercive environment and whether the person being questioned is free to leave.

It is important to understand that *Miranda* procedures only apply if both of the following situations are present:

- A person is in police custody or is otherwise deprived of his/her freedom of movement in a significant manner and
- There is police questioning or its functional equivalent, including any words or actions that are reasonably likely to elicit an incriminating response.

A suspect can stop any police questioning at any time by invoking his/her right of silence or by requesting the services of an attorney.

"Spontaneous" statements made to the police before, during or after the arrest by a person in custody are admissible in evidence even though the arrested person was not warned of his/her rights, provided that such statements are voluntary and are not made in response to police questioning or other actions.

II. POLICY

It is the policy of this department that:

- A. Persons in custody shall be given their *Miranda* rights prior to any police interrogation; and
- B. The Due Process rights of persons in custody will be respected.

III. DEFINITIONS

- A. *Custody*: When a person is under arrest, or deprived of his/her freedom in a significant manner.¹
- B. *Interrogation*: Express questioning of a suspect about a crime or suspected crime as well as any words or actions on the part of the police that the officers should know are reasonably likely to elicit an incriminating response.²

IV. PROCEDURE [1.2.3(B)]

A. *Providing Miranda Warnings*

- 1. If officer wish to interview or interrogate a suspect who is in custody or deprived of his/her freedom in a significant way, officers are obligated to give Miranda warnings prior to such interrogation.

The Miranda warnings shall be read from a preprinted card or form in a clear and unhurried manner prior to questioning.

Persons who do not speak English must be given these warnings in a language that they understand.

Sample Miranda Warning Language:

- ☐ ***You have the right to remain silent;***
- ☐ ***Anything that you say can be used against you in a court of law;***
- ☐ ***You have the right to consult with an attorney before being questioned and to have the lawyer present during the interrogation; and***
- ☐ ***If you cannot afford a lawyer, one will be appointed for you at government expense and you can consult with the appointed lawyer prior to the interrogation and have the appointed lawyer present during the interrogation.***

- 2. The suspect shall then be asked the following questions: Do you understand each of these rights that have been explained to you?

Having these rights in mind, do you wish to answer questions now?

3. Persons undergoing the booking process shall be given Miranda warnings as part of the booking procedure. For further information see the department policy on Detainee Processing.
4. If there is any substantial delay between the Miranda warnings and the police questioning, the suspect shall be advised of these rights again before the questioning begins.
5. Whenever an officer has any doubt as to the applicability of the Miranda warnings in any particular case, it is advisable that these warnings be given to the suspect to avoid any subsequent legal barrier to the admissibility of any statements obtained.
6. If, at any time, a suspect requests to read his/her rights or to be informed of his/her rights, these requests shall be granted.
7. JUVENILES: Before a juvenile between the ages of 7 and 17 is questioned, the Miranda warnings shall be given in the presence of the juvenile and his/her parent, guardian or other interested adult. The adult must acknowledge that [s]he understands the rights and the juvenile must be given the opportunity to have a meaningful consultation with the adult. See department policy on **Handling Juveniles**.

B. Non-Miranda Situations

1. SPONTANEOUS STATEMENTS

Officers may note any spontaneous and volunteered statements. When a suspect or prisoner voluntarily makes a statement, officers do not have to prevent him/her from continuing to talk and the Miranda warnings are not a prerequisite for admissibility of any such statements in evidence at court.

- 1) Spontaneous and volunteered statements are statements made by a suspect of his/her own free will and not made in response to police questioning.
 - 2) A person who voluntarily enters a police station and makes incriminating statements need not be given the Miranda warnings.³
 - 3) Spontaneous and volunteered statements may be taken after the suspect is in custody and before, during, or after actual interrogation so long as the statements are clearly voluntary.
2. INVESTIGATORY STOP AND FRISKS: Non-custodial preliminary or investigative questioning need not be preceded by Miranda warnings.⁴ See department policy on **Stop and Frisk and Threshold Inquiries**.
3. NON-LAW ENFORCEMENT QUESTIONING: Miranda does not apply to statements made in response to questioning by private citizens,

unless the private citizen is acting on behalf of the police. For a citizen to constitute an agent of the police, the police must request or encourage the citizen's help.⁵ Thus, where a fellow prisoner initiates questioning about a crime in hopes of trading information for a lighter sentence, any statements made are admissible if the police neither encouraged nor sought the prisoner's assistance.⁶

4. TRAFFIC VIOLATIONS OR TRAFFIC COLLISIONS

A person need not be given Miranda warnings if [s]he has been stopped for violating motor vehicle laws.⁷

An officer's request that a motorist perform field sobriety tests does not require that Miranda warnings be given.⁸

C. Waiver of Rights

1. VALID WAIVERS

Statements made by an arrestee more than six hours after the arrest (safe harbor period) are inadmissible unless the arrestee has been arraigned or has made a valid written waiver of his/her right to be arraigned without unreasonable delay.⁹

- 1) If the arrestee is incapacitated due to a self-induced disability (such as the use of drugs or alcohol) the six hour safe harbor period does not begin until the disability terminates.¹⁰
- 2) The six hour period is also tolled (i.e., suspended or extended) when interrogation is not possible or must be suspended for reasons not attributable to the police, such as a natural disaster or emergency.¹¹

The interrogating officers should be certain that the suspect understands the rights which have been read to him/her as the burden will be on the prosecution to prove that the waiver was valid.¹²

The waiver must be made voluntarily, knowingly and intelligently to meet the conditions of the Miranda decision.

In determining whether a valid waiver was made, the court examines whether in light of the totality of the circumstances surrounding the making of the waiver, the will of the suspect was overborne such that the statement was not a free and voluntary act. The court considers the circumstances of the interrogation and the individual characteristics and conduct of the suspect, such as the length of time which transpired between the giving of the Miranda warnings and the waiver, the suspect's age, mental capacity and experience.¹³

When the suspect waives his/her rights, the interrogating officers shall obtain a written waiver when possible. A waiver may be made orally or in writing, but a written and properly witnessed waiver is more likely to be upheld in court.

Silence on the part of the suspect does not constitute a valid waiver.¹⁴

The physical and emotional condition of the person being questioned is an important consideration in determining the validity of a waiver. The police should refrain from questioning if the suspect is clearly not capable of understanding his/her rights.¹⁵

2. COMPETENCY

A suspect must be competent to waive his/her rights prior to police questioning. The question of competency is a question of fact to be determined by the circumstances in each case.

The competency issue is more likely to be raised under the following circumstances:

- 1) If the suspect is distraught or very disturbed because of any mental or emotional condition;
- 2) If the suspect has been wounded or is the victim of shock or other physical impairment;
- 3) If the suspect is so intoxicated or influenced by alcohol or drugs that [s]he cannot think rationally or act sensibly; or
- 4) If the suspect's intelligence level is so low, or his/her learning and education are so minimal, that [s]he does not comprehend his/her rights.

In any of the circumstances enumerated above, any waiver obtained will be carefully scrutinized by the court.

3. ASSESSING COMPETENCY PRIOR TO INTERROGATION

After the Miranda rights have been read and after the suspect has shown an initial willingness to waive those rights, the police may ask the suspect about the following in order to properly assess the suspect's ability to intelligently understand and waive his/her rights:

- 1) His/her age;
- 2) Whether [s]he is under the influence of any drugs or alcohol;
- 3) Whether [s]he is suffering from any mental or emotional problem;
- 4) His/her education and learning;
- 5) His/her employment;
- 6) Whether [s]he has ever been given Miranda warnings previously; and
- 7) Whether [s]he understands the words used by the officer in reciting the Miranda warnings or what they mean.

D. Access to Counsel**1. REQUEST FOR COUNSEL**

If a suspect states that [s]he wishes to consult an attorney,

- 1) [S]he must not be questioned further by police until [s]he has had an opportunity to consult an attorney.
- 2) If the suspect initiates statements or conversation, the police may respond to those statements or conversation.

If a suspect has voluntarily waived his/her right to remain silent, [s]he may still invoke this right by refusing to answer any further questions or by requesting an attorney. At this point the police questioning must cease.

A suspect may answer some questions and refuse to answer others. The officer is not required to discontinue questioning unless the suspect indicates that [s]he wishes to remain totally silent to stop the questioning or to consult with a lawyer.

2. REPRESENTATION BY COUNSEL

If the police are aware that the suspect is represented by an attorney, even on other matters, and that the attorney desires to be present with his/her client during any questioning, the police must inform the suspect that his/her attorney wishes to be present during questioning.

Once so informed, the suspect may waive his/her right to have his/her attorney present.

3. POST ARRAIGNMENT: Once a suspect has been arraigned, the suspect has a right to counsel, regardless of whether or not the suspect is in custody. The suspect shall not be questioned in the absence of counsel unless [s]he specifically waives that right.¹⁶

E. Setting of the Interrogation**1. GENERALLY**

An interrogation is a controlled process, controlled by the officer conducting the interrogation. It should be conducted in a setting that provides a degree of privacy as well as safety and security for the officer and the suspect as well.

All rooms used for conducting interrogations including rooms designated for this purpose shall be inspected for security issues prior to bringing the suspect into the room and conducting the interview. [42.2.10(b)]

This applies to both uniformed and non-uniformed personnel.

2. DESIGNATED INTERVIEW ROOM

The interview room should be sparsely furnished with chairs for the officer(s) and suspects, and a small table.

If a telephone is in the room, the ringer should be switched off.

Writing materials, department forms, recording equipment and media will be maintained in the interview room. [42.2.10(e)]

Other items should not be left in the interview room.

Weapons must not be allowed inside of the interview room. [42.2.10(a)]

- 1) Persons being interrogated should be pat-frisked for firearms and other weapons prior to being admitted into the interview room.
- 2) Police firearms should be secured in a designated location outside of the room.

3. PERSONNEL

Usually, no more than two officers should be present during an interrogation. [42.2.10(c)]

Live audio and video may be made available for other officers to observe a recorded interrogation.

Interrogations should never be conducted by a single officer without a back-up officer readily available in the event that the interviewing officer needs help.

4. MEANS OF SUMMONSING ASSISTANCE [42.2.10(D)]

If two officers are conducting an interrogation, no other backup officers are required. Depending on the suspect, additional backup officer(s) may be advisable.

A backup officer shall be located in the immediate vicinity of the interrogation, within audible distance, for the duration of the interrogation, in the event that the interviewing officer(s) summons assistance.

Live audio and video may be made available for other officers to observe a recorded interrogation for the safety of the officer(s) conducting the interrogation.¹⁷

[RECOMMENDED] A duress button may be installed in the event that an officer needs assistance.

For information on recording interviews and interrogations, see the department policy on ***Electronic Recording Interrogations***.

5. BREAKS: If an interview or interrogations is of long duration, officer(s) must make arrangements for access to restrooms, water, and provide for comfort breaks while continuing to provide for the security and safety of all parties involved. [42.2.10(f)]

F. Documenting Suspect Statements and Confessions

1. RECORDING REQUIREMENTS

In *Commonwealth v. DiGiambattista*, 442 Mass. 423 (2004), the Supreme Judicial Court has expressed a preference that interrogations conducted in a custodial setting be recorded whenever practicable.

In the absence of recording the court will issue jury instructions that jurors “should weigh evidence of the defendant’s alleged statement with great caution and care.”

This jury instruction is required regardless of the reason that the police did not record the interrogation. Failure to record may create an unnecessary burden for the prosecution.

2. RECORDING INTERROGATIONS

Officers shall video and or audio record all suspect interrogations whenever possible.

Before recording an interrogation, the suspect shall be notified that the conversation will be recorded.¹⁸

For further information see department policy on ***Electronic Recording of Interrogations***.

3. SUSPECT REFUSAL TO BE RECORDED

In the event that a suspect refuses to be recorded, see the procedures set forth in the department policy on ***Electronic Recording of Interrogations***.

- 1) The officer shall document the fact into his/her report.
- 2) If the suspect submits a written statement the suspect should be asked to include a statement regarding his/her wishes not to be recorded.

4. NOTE TAKING

Notes should be taken in a manner that does not interrupt the interviewing process. Some interviewees are reluctant to talk if they notice that the officer is taking down every word they say.

Brief notes can be made without deterring or distracting the interviewee. However, if a statement appears highly informative due to its nature and content, a verbatim account should be made.

5. WRITTEN STATEMENT OR CONFESSION

Obtain a written statement from the witness/victim, if appropriate.

The statement may be written on a “Statement” form, or on blank paper. If the statement form is used, have the writer fill in the blank spaces. If using blank paper, ask the writer to provide the necessary information:

- 1) Identification of the writer
- 2) Writers address
- 3) Date and time that the written statement was undertaken.
- 4) Location of the statement.

The suspect should recount the incident in his/her own words.

The suspect should review the statement; correct any errors, sign, and date the statement.

The interrogating officer(s) shall sign and date the statement or confession.

If the person giving the statement cannot write the statement due to injury, illiteracy, or other reason, the statement may be dictated and written, word for word, by a companion, or by a police officer.

6. TRANSCRIBED STATEMENT

TYPES OF TRANSCRIBED STATEMENTS

- 1) An oral statement transcribed from a recorded interview is preferred.
- 2) A statement may also be transcribed by writing down the suspects words as the statement is being dictated.

WRITTEN STATEMENTS OR CONFESSIONS AS EVIDENCE

- 1) The transcribed statement shall be reviewed by the person who gave the statement, any errors or omissions corrected, and then signed by that person.
- 2) The interrogating officer(s) shall sign and date all written statements and confessions.

G. Conducting the Interview or Interrogation

1. BEGINNING THE INTERVIEW

- a. At the beginning of the recorded interview, verbally record the following:
 - 1) The name(s) of officers present during the interview.
 - 2) Date and time of the interview.
 - 3) The location of the interview.
 - 4) The name of the witness being interviewed.
- b. If the interview is not being recorded, the information shall be recorded in writing.

2. CONDUCTING THE INTERVIEW

- a. Ask the person being interviewed to fully describe the incident.

- b. Ask specific questions to clarify the statement or to fill in any omissions or unknowns.
- c. Note:
 - 1) any relationship or connection the suspect might have with the victim, other perpetrator or the property or premises involved in the crime;
 - 2) the overall credibility of the witness/victim;
 - 3) his/her opportunity to make observations; and his/her ability to recall details as opposed to general impressions, etc.
- 3. OBSERVATIONS: Observe and note any emotional outbursts, inflections of the voice and nervous reactions which may indicate areas requiring further probing or clarification.
- 4. TERMINATING THE INTERVIEW: Interviews should be ended in a courteous manner.
- 5. DOCUMENTING THE INTERVIEW

The circumstances surrounding the conduct of interrogations and recording of confessions shall be fully documented. This includes:

- 1) Location, date, time of day and duration of interview;
- 2) Identities of officers or others present;
- 3) Miranda warnings given, suspect responses and waivers provided, if any; and
- 4) The nature and duration of breaks in questioning to provide the suspect food, drink, use of the restroom, or for other purposes.

¹ *Miranda v. Arizona*, 384 U.S. 436, 86 S.Ct. 1602 (1966)

² *Com. v. Morse*, 427 Mass. 117, 691 N.E.2d 566 (1998)

³ *Oregon v. Mathiason*, 429 U.S. 492, 97 S.Ct. 711 (1977)

⁴ See, *Miranda v. Arizona*, 384 U.S. 436, 86 S.Ct. 1602 (1966); *Com. v. Podlaski*, 377 Mass. 339, 398 N.E.2d 1379 (1979)

⁵ *Massiah v. U.S.*, 377 U.S. 201, 84 S.Ct. 1199 (1964)

⁶ *Com v. Gajka*, 425 Mass. 751, 682 N.E.2d 1345 (1997)

⁷ *Berkemere v. McCarty*, 468 U.S. 420, 104 S.Ct. 3138 (1984)

⁸ *Com. v. Wholley*, 429 Mass. 1010, 709 N.E.2d 1117 (1999); See also, *Vanhouston v. Com.*, 424 Mass. 327, 676 N.E.2d 460 (1999)

⁹ *Com. v. Rosario*, 422 Mass. 28, 661 N.E.2d 71 (1996)

¹⁰ *Com. v. Rosario*, 422 Mass. 28, 661 N.E.2d 71 (1996)

¹¹*Com. v. Rosario*, 422 Mass. 28, 661 N.E.2d 71 (1996)

¹²*Com. v. Nom*, 426 Mass. 152, 686 N.E.2d 1017 (1997)

¹³*Com. v. Nom*, 426 Mass. 152, 686 N.E.2d 1017 (1997); *Com. v. Hooks*, 38 Mass. App. Ct. 301, 647 N.E.2d 440 (1995)

¹⁴*Com. v. Roy*, 2 Mass. App. 14, 307 N.E.2d 851 (1974)

¹⁵*Com. v. Hosey*, 368 Mass. 571, 334 N.E.2d 44 (1975)

¹⁶*Massiah v. U.S.*, 377 U.S. 201, 84 S.Ct. 1199 (1964)

¹⁷M.G.L. c. 272, s. 99(D)(e)

¹⁸M.G.L. c. 272, s. 99

TESTIFYING IN COURT

POLICY & PROCEDURE NO. 1.14	ISSUE DATE:
MASSACHUSETTS POLICE ACCREDITATION STANDARDS REFERENCED: none	EFFECTIVE DATE:
	REVISION DATE:

I. GENERAL CONSIDERATIONS AND GUIDELINES

The presentation of evidence in court is the final step taken by the police in a criminal case. All of the police efforts that precede the court appearance can be nullified by an inadequate, incomplete or unsatisfactory presentation of the facts by the testifying officer.

The court will consider not only the quality and quantity of the evidence itself, but also the manner in which it is presented. The officer's personal appearance, demeanor, attitude and ability to express himself/herself in a convincing manner can greatly affect the weight given to his/her testimony and have a significant influence on the outcome of the case.

The legal technicalities involved in bringing a criminal investigation and subsequent prosecution to a successful conclusion require a team approach. By working together, the prosecutor relies on the investigative skills of the police, and the police rely on the skills of the prosecutor in handling the legal aspects of presenting the case to the judge or jury.

After a court proceeding has concluded, particularly if the case has been lost, an officer should review his/her testimony with the prosecutor to determine where improvements can be made to strengthen similar cases in the future.

II. POLICY

It is the policy of this department that:

- A. Officers shall cooperate with prosecutors and other court personnel to ensure the thorough and impartial prosecution of all offenders; and

B. Officers shall testify truthfully and impartially in all judicial proceedings.

Note: Being able to testify credibly in court is an essential function of every police officer's job. The prosecution is required – without motion – to inform the defense of any history of bias or untruthfulness in an officer's past. This means that officers that are untruthful, especially during internal investigations, become "damaged goods" and can no longer perform an essential job function. Even if the department has shown some lenience in discipline in such cases in the past, it is now clear that a recommendation of termination is the appropriate course the chief should follow in the future.

III. PROCEDURES

A. Prior to Trial

1. Review all aspects of the case, including reports, notes, witness statements, and review or obtain all physical evidence needed.
2. Refrain from discussing the case with the defendant in the absence of his/her attorney, if [s]he has one, or from making any agreement with the defendant's attorney for recommendations as to the disposition of the case without the knowledge of and the presence of the prosecutor and/or the department prosecuting officer.
3. In pretrial conferences with the prosecutor, provide all available information even though it may be beneficial to the defendant. No detail concerning the particular case should be considered too trivial to discuss. This will decrease the likelihood of any surprise developments during the trial.
4. To become skilled and effective in the task of testifying in court, a police officer should be familiar with the basic rules of evidence. See Appendix A for an overview of some of the rules of evidence in Massachusetts.

B. At the Courthouse

1. Officers shall be punctual in reporting at the time and place set for the hearing, trial or other proceeding. Officers' physical appearance, personal conduct and professional manner should be aimed at making the best possible impression.
2. If there is a sequestration order applicable to the police and other witnesses, officers shall remain outside the courtroom until called to testify.
 - a. Officers shall not discuss their testimony or the testimony of any other witness until the completion of the trial or other proceeding.
 - b. A sequestration order generally requires that each witness testify separately and without having discussed his/her testimony with

other witnesses and without having overheard the testimony of any other witness.

- c. Violation of a sequestration order could result in the judge's declaring a mistrial or even dismissing the case.
3. While waiting to be called to the stand, or after having provided testimony, officers shall refrain from any unnecessary discussion with other officers in the courtroom.

C. Courtroom Attire

1. JUDGE TRIALS: In trial before a judge without a jury, patrol officers may wear their uniforms or comply with the procedure below, applicable to attire in jury trials.
2. JURY TRIALS: In jury trials, the following attire requirements apply:
 - a. A male officer shall dress neatly in a suit or sports coat and tie.
 - b. A female officer shall dress in a conservative dress or suit.
 - c. Exposed firearms shall not be worn.
3. Exceptions may be made, but only with the approval of the assistant district attorney and/or police prosecutor.
4. For more information, see the department policy on **Uniforms and Equipment**.

D. Conduct as a Witness

1. As soon as [s]he is called, the testifying officer should go directly to the witness stand in a dignified and alert manner, as it is at this point that the jury gains its first impression of the officer.
 - a. During the reading of the oath, the officer should maintain an attitude that reflects the seriousness of the proceedings.
 - b. On the witness stand the officer should take a comfortable position that gives him/her a full view of the jury and the attorneys and should always maintain good posture and an alert appearance.
 - c. [S]he should avoid any movements or sounds that could be distracting to the judge or jury and which may divert their attention from his/her testimony.
2. While on the stand, the officer shall:
 - a. Testify to what [s]he knows or believes to be the truth.
 - b. Speak naturally and calmly in a distinct and clearly audible tone of voice, describing in a forthright manner the events of the case in the order in which they took place.

- c. Use plain, clearly understandable conversational language, avoiding slang and unnecessary technical terms.
 - d. Display a courteous attitude, maintaining self-control and personal composure at all times, avoiding any impression of being contentious, biased or prejudiced, even if defense counsel attempts to berate, belittle or embarrass the officer or his/her efforts.
 - e. Listen carefully to each question and respond accordingly.
 - 1) If asked to state facts, state the facts known or believed to be true.
 - 2) If asked to state an opinion or conclusion, do so if the officer has formed an opinion or conclusion which [s]he can articulate and support. Do not give a personal opinion unless asked to do so.
 - 3) If an answer is unknown, state that it is unknown.
 - f. Answer only the questions which are asked.
 - g. Make every effort to avoid errors in his/her testimony or inconsistent statements which could undermine the confidence of the judge or jury in his/her credibility.
3. When a question is asked, the testifying officer should:
- a. Look directly at the person asking the question and then give a deliberate, courteous, well-considered answer. If [s]he does not hear or clearly understand the question, [s]he should request that the question be clarified or repeated.
 - b. Pause briefly and consider every question before responding in order to:
 - 1) Ensure that the question is complete to prevent misinterpreting or misunderstanding the question;
 - 2) Give the officer an opportunity to analyze the question and to form a complete and accurate answer; and
 - 3) Give the other attorney the opportunity to make an appropriate objection to the question, if necessary.
 - c. Avoid being too deliberate in responding to questions, as any conspicuous wavering or hesitancy on his/her part may be interpreted as indecision or uncertainty.
 - d. Be as specific as possible in his/her responses, but in testifying as to times or distances [s]he should state that they are approximations unless [s]he has the exact information readily available.
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4. When an objection has been made, an officer should immediately cease testifying, look at the judge and await his/her decision.
5. REFER TO NOTES: At the request of the prosecutor or defense attorney, and with the permission of the judge, an officer may refer to his/her notes or a police report to refresh his/her memory on a given point. This is called present recollection refreshed. If the officer has no current recollection on a given point but did make a report or record at an earlier time, the prosecutor or defense attorney may request that report or record to be admitted into evidence. This is called past recollection recorded. Continual reliance on notes can detract from the officer's testimony and raise doubts as to the officer's knowledge of the facts.

E. Inaccurate or Omitted Testimony

1. If during or at the conclusion of his/her direct testimony and before cross-examination, an officer realizes that an important point has not been brought out or fully developed by the prosecutor's questions, the officer, while still on the witness stand, may utilize a discreet signal to gain the prosecutor's attention. This will allow the prosecutor to ask the judge for permission to confer with the officer. If that method is unavailable or unsuccessful, the officer may address the judge directly and request permission for a very brief conference with the prosecutor.
 - a. The officer should not wait until [s]he has been excused from the witness stand to inform the prosecutor of important matters not brought out in his/her testimony. At that point, it may be difficult for the prosecutor to get the officer back on the stand or, even if [s]he does so, to ask questions about matters not raised on direct examination. Naturally, these problems should be avoided by close cooperation in the preparation of a case between the officer and the prosecutor.
 - b. If an omission is realized after the officer has left the witness stand, [s]he shall inform the prosecutor as soon as possible in a manner that is not distracting to the court. Writing a note and passing it to the prosecutor is an acceptable method to accomplish this purpose.
2. If a mistake in testimony has been made, the officer shall voluntarily correct any error as soon as possible.

NOTE: Officers that intentionally lie as witnesses in court or other official hearing or investigation are subject to termination.

F. Defense Attorney Tactics

1. A defense attorney may resort to a variety of tactics in an effort to confuse or upset the testifying police officer or to discredit his/her testimony.
 - a. This must be expected, and it is permissible within ethical limits.
 - b. An officer's ability to cope with these tactics improves with experience.
 - c. As the judge and jury will be closely observing the officer, [s]he should never become argumentative or display anger or animosity towards the defense counsel. [S]he should remain calm and courteous at all times, despite any badgering tactics by the defense, and take sufficient time to permit the prosecutor to make appropriate objections.
 2. The following are some of the most common tactics used by a defense attorney in cross-examination:
 - a. Asking questions in a rapid-fire manner to confuse the witness;
 - b. Intentionally mispronouncing the officer's name or calling him/her by the wrong rank or title in order to affect his/her concentration;
 - c. Being overly friendly to give the witness a false sense of security before attempting to lead him/her into inconsistent or conflicting answers;
 - d. Being condescending to the point of ridicule to give the impression that the officer lacks experience or expertise;
 - e. Asking repetitious questions or rephrasing previous questions in order to obtain inconsistent answers or answers which conflict with previous testimony by the witness;
 - f. Asking questions which suggest a particular answer in order to lead the witness into responding;
 - g. Continuing to stare directly at the witness after [s]he has responded in order to provoke the witness into elaborating on his/her answer and providing more information than the question called for;
 - h. Demanding a "yes" or "no" answer to questions that obviously require more explanation;
 - i. Suggesting or indicating that conflicting answers were given in earlier testimony; and
 - j. Belligerent questioning to anger and disconcert the witness.
 3. All officers must acquire the ability to remain calm, deliberate and objective, despite such provocation, and understand that it is the
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purpose of the defense attorney to diminish or discredit the effect of the officer's testimony on the judge and jury.

- G. ***Testifying in Civil Suits or as a Defense Witness:*** Officers shall refer to the department's rules and regulations regarding testifying in civil suits or appearing as a defense witness in a criminal case.

APPENDIX A: OVERVIEW OF MASSACHUSETTS RULES OF EVIDENCE

Evidence may be defined as the legal means by which any alleged matter of fact is established or disproved when submitted to a judicial inquiry. It includes the testimony of witnesses or the introduction of records, documents, exhibits or other objects which are relevant and material to the particular case.

The three primary tests for the admissibility of evidence, as determined by the court, are as follows:

1. It must be **relevant** in that it is legally as well as logically related to the issue in question;
2. It must be **material** to the issue before the court in that it establishes the facts in the case and contains sufficient measurable weight to aid the jury in reaching a conclusion; and
3. It must be **competent** in that it meets all required legal standards for admissibility in order to ensure that only information of a reliable nature is presented to the jury for consideration.

Some of the more common classifications of evidence are as follows:

Direct Evidence: As opposed to circumstantial evidence, direct evidence includes testimony from a witness as to what the witness personally observed or personally knows to be a fact; it also includes any physical object or presentation which in itself indicates or proves a given fact or conclusion. For example, if the witness testifies that [s]he saw the defendant operating the motor vehicle in question, that is direct evidence pertaining to that fact. On the other hand, if the witness testifies that [s]he saw the defendant's car being operated, that the defendant had the only set of keys and that the defendant had said [s]he would be using the car that day, that is circumstantial evidence that the defendant was the operator.

Direct evidence is often broken down into four forms:

1. **Oral Evidence:** Testimony by a competent witness under oath and subject to cross examination.
2. **Real Evidence:** Objects and items that are physically present at court and admitted into evidence for examination and consideration by the judge and jury.
3. **Documentary Evidence:** Any instruments containing written or otherwise recorded entries (e.g., a book, ledger, receipt, report, letter, deed, contract, diary).
4. **Demonstrative Evidence:** This includes any display or visual presentation, such as a map, photograph or film, sketch or other depiction.

Circumstantial Evidence: In contrast to direct evidence, circumstantial evidence includes testimony or physical objects or items from which the existence of a fact can be inferred or a certain conclusion drawn, but the testimony or physical objects or items do not in and of themselves directly establish that fact or conclusion. For example, if the defendant is found with very recently stolen property in his/her possession, the circumstances could warrant a judge or jury in concluding that the defendant must have known the property was stolen.

Best Evidence Rule: Whenever possible, the original of a written document must be produced at court. If the original is not offered, a copy or other secondary evidence of the contents of that document will be accepted only if the absence of the original is adequately explained to the satisfaction of the court. The best evidence rule applies only to written documents and not to photographs, tape recordings, visual displays, etc.¹

Corroborative Evidence: Evidence which confirms or strengthens other evidence.

Cumulative Evidence: Evidence of the same kind, to the same point or effect which further establishes what has already been indicated or suggested by other evidence.

Prima Facie Evidence: Evidence which is sufficient on its own to establish a given point or conclusion and is legally binding unless it is effectively rebutted or discredited. For example, a properly executed certificate of a chemist of the Department of Public Health is **prima facie** evidence of (a) the composition, (b) the quality, and (c) the weight of the drug or other chemical analyzed. Once such a certificate is admitted into evidence, the judge or jury must accept what the certificate states pertaining to composition, quality and net weight.²

Present Recollection Refreshed: If a witness has some memory or recall of an event or information, but his/her present recollection is incomplete, vague or unsure, [s]he may, with the permission of the court, "refresh" his/her recollection by consulting any report, record, document or other reference. However, the report or document used to refresh the witness' recollection may be examined by opposing counsel.

Past Recollection Recorded: If a witness has no memory or recollection whatsoever of an event or information, but [s]he did make reliable notes or records of that event or information at some point in the past, those notes or records may be admitted into evidence (unless they contain hearsay or other objectionable material).

Expert Evidence: Evidence presented by a person who is accepted by the court as having special knowledge of a subject not usually possessed by the average person and derived from his/her training, education and experience in that field. The testimony of an expert, as to facts or opinions, is not binding on the judge or jury; they may give expert testimony whatever weight or credibility they decide that it deserves.

Opinion Evidence: As a general rule, neither expert witnesses nor lay people (non-experts) may testify as to their opinion on any matter. They must restrict themselves to testifying to facts and observations. However, courts recognize that the opinions of certain experts within the scope of their specialty are admissible and may aid the judge or jury in its deliberations and decision. Lay witnesses (the average person) may testify to an opinion on such common place matters as:

1. The apparent age of a person;
2. The apparent physical condition of a person;
3. The obvious emotional state of a person;
4. Identity and likeness of appearance, voice or handwriting;
5. Whether a person appeared to be under the influence of alcohol or drugs;
6. Sense recognition, such as whether an object was heavy, red or bulky;
7. The direction from which a sound emanated;
8. The estimated speed of a vehicle or other moving object;
9. The value of an item (if the witness was the owner or has had sufficient dealings with such objects to be able to render a credible opinion as to its value).

Hearsay. Hearsay evidence consists of oral or written statements:

1. Made by one other than the witness;
2. Made out of court;
3. Not under oath;
4. Not subject to cross-examination;
5. If offered to prove the truth of the matter asserted therein.

Hearsay statements are unreliable for several reasons. They were made out of court by the person originating the statement. They were not made under oath or while the originator of the statement was subject to cross-examination. And, the person repeating those statements in court may not have recalled them completely or accurately. In addition, if witnesses in a criminal trial are allowed to testify to what someone else said was true and that other person is not available, then the defendant would be deprived of his/her Sixth Amendment right to confront all the witnesses against him/her.

Although hearsay statements are generally objectionable, there are many exceptions to the general rule. Some are listed below:

1. **Dying Declarations:** In a prosecution for homicide, statements made by a dying person regarding the cause and circumstances relating to his/her imminent death are admissible if the dying person believed death

to be imminent and [s]he did, in fact, die shortly after the statements were uttered.

- 2. Confessions:** Admissions and declarations against penal interest (all defined below) are admissible if legally and voluntarily made.
- 3. Spontaneous Exclamations** (also called excited utterances): If a person makes a statement during or very shortly after the occurrence of a startling event and while under the excitement or stress of that startling event, another person may testify to those statements.
- 4. Public records** and reports: Maintained by legal requirement or duty, if properly authenticated.
- 5. Business records:** These include any entry, record or memorandum if it was made in good faith, in the regular course of business, before the beginning of the litigation in question, and if it was a regular business practice to make such entries, records or memoranda. Although this is commonly referred to as the "business records" exception to the hearsay rule, it also applies to records of non-profit organizations and to records maintained by government agencies, including police departments.
- 6. Unavailable witness:** This refers to testimony given previously by a witness who was then under oath and subject to cross examination where the parties and issues are sufficiently similar to the present proceedings, if the witness is presently unavailable through no fault or collusion of the party seeking to admit the former testimony.
- 7. "Fresh Complaint"** (in rape and sexual assault cases): If the victim of a rape or other sexual assault reports the incident to another person within a reasonable time after the incident, the person to whom the victim complained of the rape or assault may testify as to what the victim said had occurred.

Confession: A statement made by a competent person voluntarily acknowledging that [s]he committed a given offense. A confession, by itself, is sufficient for a conviction, provided there is some evidence that the crime was committed.³

Admission: A statement or declaration in which the accused acknowledges the truthfulness of a fact which may or may not, along with other evidence, prove his/her guilt.

Declaration Against Penal Interest: A statement which would tend to expose the maker of the statement to criminal penalty.

Joint Venture - Joint Acts and Declarations: If two or more persons join efforts to perpetrate or accomplish a crime, generally, the acts and declarations of each can be used against all in court. Also, an individual is criminally responsible for the actions of his/her joint venturer if [s]he harbored the same criminal intent and was present at the scene of the crime. There need not be

an overt agreement to prove a joint venture. It is enough if two or more persons act together or assist one another in the crime. To prove conspiracy, however, there must be evidence of an overt agreement to commit the crime.⁴

Bruton Rule: The U.S. Supreme Court ruled that it is a violation of a defendant's Sixth Amendment right to confront adverse witnesses to try a defendant jointly with a co-defendant where the co-defendant has made admissions or confessions that implicate the defendant, but the co-defendant chooses not to testify (and, therefore, is not subject to cross-examination by the defendant). Thus, where there are two or more persons charged with the same offense, severance (separate trials) sometimes occurs.⁵ This rule was reinforced by the Massachusetts Supreme Judicial Court⁶ which held that the admission in a joint trial of a co-defendant's statement implicating the defendant was reversible error, even though the Commonwealth alleged that the co-defendant's statement was offered only to show consciousness of guilt and argued during trial that the statement should be disbelieved.

Privileges: Under certain limited circumstances, the law protects important rights and special relationships by granting persons a privilege against being compelled to testify, even in criminal prosecutions. The more common are:

1. Lawyer - client
2. Psychotherapist - patient⁷
3. Husband - wife⁸
4. Clergy - penitent⁹
5. Government privilege to withhold identity of informer¹⁰
6. Social worker - client¹¹
7. Sexual assault counselor - rape victim¹²
8. Parent - child¹³

Note: There is no physician - patient privilege presently recognized under Massachusetts law.

Exclusionary Rule: Generally, if it is shown that evidence was obtained by police in a manner which contravened the rights of the defendant, that evidence will, upon motion of the defendant, be excluded at court. The most common areas involving motions to suppress allegedly unlawfully obtained evidence are interrogation and searches and seizures. See departmental policies on **Search and Seizure**, **Interrogating Suspects and Arrestees** and **Arrest**. However, the police should be aware of several exceptions to the exclusionary rule and should discuss utilizing any of these exceptions with the prosecutor in appropriate cases.

1. **Attenuation:** If the unlawful police action was so far removed from or so remotely connected to the incriminatory evidence obtained, the court

may rule that any taint due to the initial illegality was "attenuated," and the exclusionary rule should not apply.¹⁴

2. **Independent source:** If the police can establish that they obtained the evidence in question from a source or in a manner completely independent of the unlawful procedure, the exclusionary rule may not apply.¹⁵
3. **Inevitable discovery:** If police can establish that they would have obtained the evidence in question anyway and in a lawful manner, the exclusionary rule may not apply.¹⁶

NOTE: The Supreme Judicial Court has held that this exception cannot be applied to cure an illegal warrantless search on the basis that it was inevitable that a warrant would be obtained.¹⁷ In another Massachusetts case the Court indicated that the inevitable discovery rule may apply to cure or to apply in a situation not requiring a warrant (e.g., protective custody).¹⁸ In implementing the rule, the Court focused on two issues:

- a. The issue of inevitability; and
- b. The character of the police misconduct.

4. **Procedural uses of otherwise excludable evidence:** If the defendant failed to file it in a timely manner, the prosecutor may be able to defeat a motion to suppress. Also, otherwise excludable evidence can be used to impeach the defendant if [s]he takes the witness stand and denies any knowledge of or connection to the evidence unlawfully seized.
5. **"Good Faith" exception:** For example, where police reasonably rely on what appears to be a valid search warrant, the exclusionary rule may not be applied even though a court subsequently determines that the search warrant was defective.

NOTE: Massachusetts has yet to decide whether it will follow the good faith exception.¹⁹

¹ M.G.L. c.233, §79K.

² M.G.L. c.111, §13.

³ *Com. v. Forde*, 392 Mass. 453, 466 N.E.2d 510 (1984).

⁴ *Com. v. Clarke*, 418 Mass. 207, 635 N.E.2d 1197 (1994); *Com. v. Bianco*, 388 Mass. 358, 446 N.E.2d 1041 (1983).

⁵ *U.S. v. Bruton*, 391 U.S. 123, 88 S. Ct. 1620 (1968).

⁶ *Com. v. Hawkesworth*, 405 Mass. 664, 543 N.E.2d 691 (1989).

⁷ M.G.L. c. 233, § 20B.

⁸ M.G.L. c. 233, § 20.

⁹ M.G.L. c. 233, §20A.

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- ¹⁰ *Com. v. Abdelnour*, 11 Mass. App. Ct. 531, 417 N.E.2d 463.
- ¹¹ M.G.L. c. 112, §135, 135A and 135B.
- ¹² M.G.L. c. 233, §20J.
- ¹³ M.G.L. c. 233, § 20.
- ¹⁴ *Com. v. Crowe*, 21 Mass. App. 456, 488 N.E.2d 780 (1986), *rev. den'd* 397 Mass. 1101, 409 N.E.2d 806 (1986).
- ¹⁵ *Murray v. U.S.*, 487 U.S. 533 (1988).
- ¹⁶ *Nix v. Williams*, 467 U.S. 431 (1984).
- ¹⁷ *Com. v. Benoit*, 382 Mass. 210, 415 N.E.2d 818 (1981).
- ¹⁸ *Com. v. O'Connor*, 406 Mass. 112, 546 N.E.2d 336 (1989).
- ¹⁹ *Com. v. Pellegrini*, 405 Mass. 86, 539 N.E.2d 514 (1989), *cert. den'd* in 110 S.Ct. 497.

BABY SAFE HAVEN

POLICY & PROCEDURE NO. 1.17 draft	ISSUE DATE:
MASSACHUSETTS POLICE ACCREDITATION STANDARDS REFERENCED: none	EFFECTIVE DATE:
	REVISION DATE:

I. GENERAL CONSIDERATIONS AND GUIDELINES

In 2004 the Massachusetts Legislature passed Chapter 227, An Act Relative to the Placement of Newborn Infants, a temporary law which provided a mechanism for parents to voluntarily abandon newborn infants, within seven days of birth, without the abandonment itself constituting criminal neglect. The law was made permanent with passage of Chapter 86 of the Acts of 2007.

The purpose of this policy is to provide guidance to officers faced with a voluntary abandonment. This policy does not in any way prohibit police from accepting an infant or child believed to be older than seven days.

II. POLICY

It is the policy of this department to ensure that infants voluntarily abandoned are received, cared for, and transferred to the appropriate social services agency.

III. DEFINITIONS

- A. *Newborn Infant*: a baby seven (7) days old or younger.
- B. *Voluntary Abandonment*: Voluntarily leaving the newborn infant with an appropriate person at a designated facility.
- C. *Designated Facility*: A hospital, police department or manned fire station (the locations stipulated by the Safe Haven Law).

D. Appropriate Person: A person at a designated facility who is able to ensure that the newborn infant is safe (i.e., the triage person in a hospital emergency department or duty officer in a police station).

E. Notification: An immediate notice to be filed with the Department of Social Services (DSS) on the voluntary surrender of the newborn infant.

IV. PROCEDURES

A. Caretaker Exemptions

1. The act of abandonment in and of itself shall not constitute abuse or neglect provided that the newborn infant is:¹
 - a. Seven (7) days of age or less;
 - b. Delivered to an appropriate person;
 - c. Delivered to a designated facility, defined as:
 - 1) A hospital;
 - 2) A police department; or
 - 3) A manned fire station.
2. Other acts of abuse or neglect are not exempted under this statute.
3. If an infant or child is obviously more than seven days old, this procedure shall be followed, and in addition:
 - a. The officer shall attempt to identify the abandoning parent;
 - b. A investigation shall be conducted and a report prepared; and
 - c. The District Attorney's Office should be consulted before any criminal charges are sought.

B. Responding to a Voluntary Abandonment

1. IMMEDIATE RESPONSE
 - a. Any department member may accept a child for voluntary abandonment. It is preferred that a police officer receive the infant from the caretaker.
 - b. Upon receiving a request for voluntary abandonment, the dispatcher shall immediately:
 - 1) Notify a supervisor.
 - 2) Dispatch an officer to meet the parent(s) and take custody of the infant (even if a non-sworn employee takes custody of the infant).
 - 3) Request EMS to respond to: a) Check the medical condition of the infant; and

- b) Transport the infant to an acute care hospital emergency department, if available.

2. ADDRESSING THE CARETAKER

- a. If there are obvious signs of physical abuse or neglect, the officer shall initiate a preliminary investigation and submit a report of Neglect and Abuse to DSS.²
 - b. If one or more of the parents is available:
 - 1) Thank them for bringing the infant to a safe place.
 - 2) Ask if they would be willing to provide any information that would assist in planning for the future care of the child. Inform them that situations often arise, or children have questions as they grow older, that only they as parents can address.
 - 3) Encourage the parent to provide the information, but the parent shall not be required to provide such information. Make every effort to solicit the following information:
 - a) The name of the newborn infant;
 - b) The name and address of the parent placing the newborn infant;
 - c) The location of the newborn infant's birthplace;
 - d) Information relative to the newborn infant's medical history;
 - e) His or her biological family's medical history;
 - f) Any other information that might reasonably assist the department in determining the best interest of the child; and
 - g) Whether the parent plans on returning to seek future custody of the child.
 - c. Employees should collect the information on the department's Baby Safe Haven form to ensure that this information is requested.
 - d. Take custody of any food, clothing, blankets, or other items turned over by the parent.
 - e. Officer(s) should inquire as to the parent(s)' needs for intervention services, including domestic violence assistance, and provide the following number: Baby Safe Haven Hotline: 1-866-814-SAFE (7233).
- ## 3. CARING FOR THE INFANT
- a. An employee with an infant or very young child may be very helpful in immediately caring for the infant until additional assistance arrives.

- b. An employee or other appropriate person shall be assigned to care for the infant until such time as custody is transferred to another appropriate person.
- c. The infant shall be kept in a safe and comfortable place with the temporary caretaker and never left unattended.
- d. The infant shall be turned over to EMS personnel upon their arrival, along with any food, clothing, or other items.
- e. A copy of the information volunteered by the parent should accompany the infant.

4. DEPARTMENT OF SOCIAL SERVICES

- a. DSS shall be notified and advised of the voluntary abandonment.
- b. The caller shall also advise DSS of what information is available about the infant, including:
 - 1) The infant's name and any other information volunteered by the parent;
 - 2) Any items left with the infant (food, clothing, blankets, etc.); and
 - 3) The location where the social worker can take custody of the infant (police station, hospital, etc.).

5. REPORTS

- a. Officers or employees taking custody of a voluntarily abandoned infant shall submit an incident report prior to the end of their tour of duty.
- b. If neglect or abuse is suspected, the officer shall submit an Abuse or Neglect Report to DSS.³
- c. A copy of the Baby Safe Haven form and of the officer's incident report shall be provided to DSS as soon as they are available.

¹ M.G.L. c. 119, §39 1/2.

² M.G.L. c. 119, §51A.

³ M.G.L. c. 119, §51A.

Hay Account Transfers

\$1755

FROM: Open Space Donations (297-172-5380-0000)

TO: Hubbardston Preservation Fund (211-122-5380-0000)

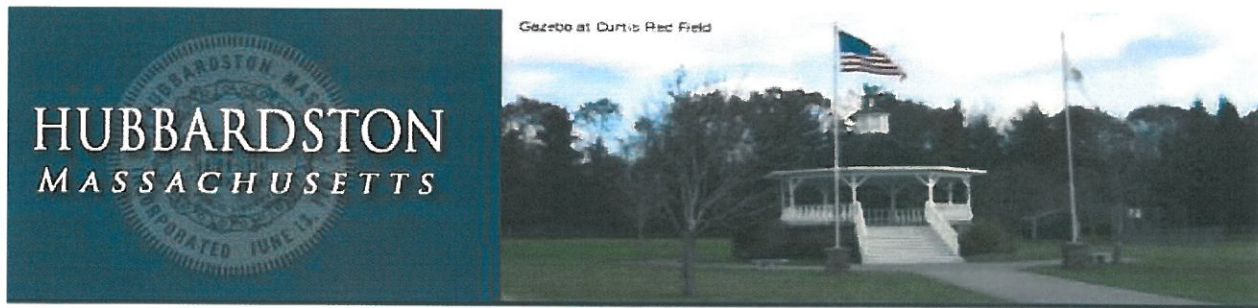
\$1755

FROM: Selectmen's Miscellaneous (001-122-4320-0000)

TO: Hubbardston Preservation Fund (211-122-5380-0000)

Move to transfer in fiscal 2019 \$1755 FROM Open Space Donations (001-122-4320-0000) to the Hubbardston Preservation Fund (211-122-5380-0000). (Motion 1)

Move to transfer in fiscal 2019 \$1755 FROM Selectmen's Miscellaneous (297-172-5380-0000) to the Hubbardston Preservation Fund (211-122-5380-0000). (Motion 2)



Town of Hubbardston Housing Production Plan

REVISED and UPDATED
May 14, 2017

Submitted to the Massachusetts Department of Housing and Community Development (DHCD) in accordance with the Guidelines for the Planned Production Regulation under MGL Chapter 40B—760 CMR 56.03(4)

Reviewed and tentatively approved by DHCD, Phil DeMartino, Technical Assistance Coordinator, Office of Sustainable Communities, DHCD, January 26, 2017.

Prepared by the Hubbardston Affordable Housing Committee

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May 14, 2017

Affordable Housing Production Plan

Table of Contents

Executive Summary	4
Proposed Strategies to implement the HPP in 2015 to 2020.....	4
Performance to Strategies of 2010 Plan	5
Demographics and Market Conditions.....	7
Status of Performance to MGL C 40B	7
Performance to MGL c.40B.....	8
10% of Housing Inventory.....	8
Land Area Minimum	8
Development Constraints and Mitigation.....	10
Available Land Area.....	10
Housing Values.....	11
Infrastructure Needs.....	11
Water and Sewer	11
Water Quality.....	11
Transportation	11
School Enrollment.....	12
Availability of Subsidy Funds.....	12
Affordable Housing Goals.....	12
Implementation Strategies	12
Identification of Zoning Districts.....	12
Specific Sites and Town Owned Land.....	13
Establish a Local Housing Committee	13
Develop a Comprehensive Zoning Rules and Regulations	13
Identify New Areas for Housing/Economic Development Opportunities	14
Utilize Community Preservation Act funds to Promote Housing.....	14
Education and Outreach Efforts and Committees	14
Housing Needs Assessment and Projection of Future Growth.....	15
Population.....	15

Housing Growth	16
Housing Unit Inventory	16
Age of Housing Stock	17
Housing Occupancy.....	18
Types of Households	19
Income Expended on Housing.....	19
Cost of Housing in Hubbardston	20
Population Age Characteristics	21
Racial Composition	22
Measures of Wealth.....	22
Hubbardston’s Labor Force	24
Education	26
Economic Sector Contribution to Local Tax Base	28
Appendix	30
Appendix I—Summary of Housing Strategies	30
Appendix II—Housing Development Time Line.....	31
Appendix III-40B Prices for SFH and Market Prices for Condos.....	32
Appendix IV—40B Performance	34
Appendix V—Town Owned Land	35
Appendix VI—Land Area Minimum Calculation	36
Appendix VII—Zoning Map.....	37
Appendix VIII—Drinking Water Protection Zones	38
Appendix IX—Developable Land	39
Appendix X—Open Space by Owner.....	40
Appendix XI—Comments by DHCD.....	41
Appendix XI—References and Acknowledgements.....	42

Hubbardston

Housing Production Plan

Executive Summary

Hubbardston is a rural town with a population of 4,398 and 1,631 housing units as of 2013. The Town of Hubbardston Housing Production Plan (HPP) is a proactive strategy for meeting the housing needs of the community and, in particular, for planning and developing affordable housing. This HPP provides a current needs assessment, overall housing goals, and new implementation strategies.

Hubbardston's original Affordable Housing Plan was prepared by the Hubbardston Zoning Board of Appeals in 2010, in compliance with the Massachusetts Department of Housing and Community Development's (DHCD) Planned Production Regulation, 760 CMR 56.03(4)). It is intended to provide a management tool that enables the Town to make timely progress toward meeting its affordable housing goals.

The purpose of the plan is threefold:

- Bring Town resources (ZBA, PB, BoH, BoS, etc.) together and focus them on a common plan to develop affordable housing.
- Identify a set of strategies and programs to be implemented by the Town.
- Create a framework, that if approved, by the state (DHCD), the Town will develop housing to meet the needs of the community.

The original HPP was approved by DHCD in January of 2010, expired January 8, 2015. The revised and updated plan was originally approved by the Housing Committee on April 14, 2016, the Planning Board on September 7, 2016 and the Board of Selectmen on October 17, 2016. A copy of the HPP was reviewed and tentatively approved by Phil DeMartino, Technical Assistance Coordinator, Office of Sustainable Communities, DHCD, on January 26, 2017. As suggested by Mr. DeMartino, changes were made. A copy of his report is attached in Addendum XI. Original approval of the Draft of this document was provided by the Planning Board on February 6, 2017 and the Board of Selectmen on February 6, 2017. FINAL approval was provided by the Planning Board on January 24, 2019 and by the Board of Selectmen on _____.

Proposed Strategies to implement the HPP in 2015 to 2020

As outlined in Addendum I, the Committee has outlined a series of actions to implement the HPP from 2015 to 2020.

At the 2016 Annual Town Meeting, the Town voted to appropriate \$50,000.00 (Fifty Thousand and 00/100 Dollars) from the Community Preservation Housing Reserve to help establish an Affordable Housing Program under the auspices of the Planning Board to assist the Town in meeting the State goal of creating a minimum of 10% of the Town's total

housing units, pursuant to M.G.L. c. 40B, § 20, eligible for inclusion on the DHCD Subsidized Housing Inventory (SHI).

The priority actions are as noted below:

- Partner with private developers— increase incentives and offer Town land at no charge to developers that will create new affordable housing.

Next Steps: Reach out to local developers, for profit and non-profit entities who have been active in producing affordable housing in the region to discuss the Town's interest in promoting these units, possible areas and opportunities for new development, and local priorities for new development. This will include the Greater Gardner CDC, RCAP Solutions, and Habitat for Humanity of North Central Massachusetts.

- Research properties that could be taken for nonpayment of delinquent tax payments and sell to affordable housing developers for delinquent taxes.
- Convert existing housing to affordability -- Preserve the affordability of the existing housing stock by converting some existing market units to state-defined "affordable" ones, thus insuring the long-term affordability of existing units. Because local market prices are fairly reasonable, with about 60% of the town's residential property assessed below \$300,000, this strategy may be a compelling one for Hubbardston.

Performance to Strategies of 2010 Plan

In January 2010, when the HPP plan was approved, the Town outlined a set of Housing Strategies that were to be implemented as part of the HPP. These are outlined in Appendix 1 and the results are summarized below.

Capacity Building Strategies

1. Establish a Housing Trust—the Housing Committee determined that the benefits of the Housing Trust were not worth the expense and have deferred the effort.
2. Conduct ongoing community education—the Housing Committee has been actively involved in addressing the housing strategy. The efforts included a cross organization meeting sponsored by the Selectmen that was attended by 20 people representing all departments in Town. The ZBA adopted Rules and Regulations governing the review of comprehensive permits to improve the process and to involve all relevant departments in Town.
3. Secure sufficient professional oversight—the Housing Committee retained a professional housing consultant (Richard Heaton of H&H Associates) to assist in the development of the housing strategies.
4. Continue to apply for Commonwealth Capital scoring—the Housing Committee has not pursued this effort and determined it was of minimal benefit to the community.

Zoning and Planning Strategies

1. Integrate affordable Housing in the OSRD bylaw—the Housing Committee determined this was not appropriate for the Town.
2. Adopt inclusionary zoning—the Housing Committee determined this was not appropriate.
3. Allow affordable housing on nonconforming lots—the Planning Board has approved two multi-unit projects and required affordable housing on these projects. These units are not included in the SHI.
4. Promote affordable housing in mixed use development—the Planning Board has approved two multi-unit projects and required affordable housing on these projects. These units are not included in the SHI.
5. Create an inventory of Town properties for housing—the Affordable Housing Committee has created a list of Town properties and properties that could potentially be taken by the Town for tax delinquencies. The Committee is currently working this list.

Housing Production Strategies

1. Partner with private developers—the Housing Committee is currently meeting with several developers including Habitat for Humanity to determine if such housing in Town could be developed.
2. Convert existing housing to affordability—the Housing Committee is identifying properties in Town that potentially could be taken for tax delinquencies and converted to affordable housing.

There is moderate poverty and moderate unemployment in the Town. Local employment has decreased in the last decade. Predominant employment industries in Hubbardston are education, health care, and manufacturing. Eighty percent of the workforce drives to work either south to Worcester or east to Gardner, Fitchburg, Leominster and Route 495.

Housing characteristics include a predominance of single family homes. There has been little housing growth but sustained building activity (such as renovations and additions) in the past decade.

Housing market data shows low housing values in Hubbardston relative to the state and county. The volume of home sales has gradually decreased since 2000. Affordability analysis show many homeowner units that are priced at or below the 80% of the median income as defined by HUD, the affordability standard for units on the state Subsidized Housing Inventory (SHI). Rental rates are more affordable, although availability is reportedly low. A third of Hubbardston households are cost burdened (spending over 30% of their income on housing), and 15% spend over half their income on housing.

The original Affordable Housing Plan was based on a comprehensive needs assessment (originally prepared in 2010 as part of this process) and a thorough analysis of existing conditions, demographic trends and local and regional market forces. It identifies the constraints that have limited affordable housing production in Hubbardston, and the town's efforts to mitigate them. It also identifies opportunities and lays out the strategies the

Town will pursue in order to meet its goal of providing housing for families across a broad range of income, age and needs. The Plan describes the mix of housing units required to address the identified needs and a time frame for their production.

This revision updates the Plan to address the most current demographic data from the US Census and updates the Town's production goals, the strategy for meeting these goals, and general editorial changes.

Demographics and Market Conditions

The rapid economic growth along Route 2 and 495 was a major driver of change for the small town of Hubbardston in early 2000 and its neighboring communities. Home prices rose 54 percent between 1990-2000, while household income increased just 21 percent, and the town saw its population of 20-34 year olds drop by 38 percent, more than double the statewide decline. This rapid growth has declined in the last ten years and The 2010 Census documented other important demographic shifts as well:

Summary of US Census Data

	1990	2000	2010	2013
Population	3,656	4,035	4,382	4,398
Housing Units	1,025	1,360	1,566	1,631

- Hubbardston has a much higher proportion of 40-64 year old. Many of those who moved to town in their thirties, raised families and are now empty-nesters and remain, "over-housed," but with no options for down-sizing.
- Hubbardston has long had a markedly smaller older population, but the town is now playing catch-up, and its "65+" population is growing at a faster rate than is the state.

At the time of the 2013 Census, Hubbardston's approximately 4,398 residents live in 1,631 units of housing. Hubbardston has one of the highest levels of owner occupancy and average lot size. New construction since 1990 has been overwhelmingly detached single-family homes on large lots, in effect, the only type of residential development allowed for much of that period.

Status of Performance to MGL C 40B

As defined by Massachusetts General Law Chapter 40B, Section 20, Chapter 40B provides for several circumstances when a town is in compliance with 40B and, through the Zoning Board of Appeals, can deny a comprehensive permit that is not consistent with local needs:

- at least 10% of all housing units in the community are approved by DHCD as affordable housing and are included in DHCD's Subsidized Housing Inventory (SHI);

- Hubbardston currently has 49 SHI units or 3% vs a goal of 10% of the total housing stock of 1,627 at the 2010 census. The Town does not meet this requirement.
- at least 1.5% of the total land area available for residential, commercial or industrial use is currently classified as "SHI Eligible Land Area" by DHCD;
 - The Town does not meet this requirement. This assumes 25.9K acres of the total 26.9K acres are excluded from the denominator due to being owned by the state or local government or expected to be in permanent conservation restriction in the next year and 8.6 acres occupied by SHI eligible housing from group homes or housing authority project.
- a town is in compliance with its Affordable Housing Production Plan (HPP);
 - The town has an approved HPP, but due to a soft building market conditions and a lack of funding has not met the plan requirements of producing 16 units per year.

Performance to MGL c.40B

10% of Housing Inventory

A reported by DHCD on December 2014, Hubbardston has 49 units of Subsidized Housing Inventory (SHI) and according to the 2010 census 1627 housing units. The SHI is 3% of the total housing inventory vs a 10% mandated goal of MGL c. 40B.

Hubbardston Total Affordable Unit Count Against 10% Goal			
	Apr-13	Jan-15	
Total Census Units	1627	1627	
Needed for 10%	163	163	
Actual SHI Units	52		
SHI %	3.2%	3.0%	
HPP Goal %	0.50%	1%	
HPP Goal Units	7	13	

Land Area Minimum

Report on 1.5% of Land Area Criteria:

M.G.L. c. 40B, § 20 establishes requirements that can be met if affordable housing exists on more than 1.5% of the total land area zoned in town for residential, commercial, and industrial uses. DHCD regulations 760CMR56.03 (3) (b) General Land Area Minimum requirements describe this process.

Denominator of the 1 ½ Land Area Equation:

For the purposes of calculating whether SHI Eligible Housing exists in the city or town on sites comprising more than 1½% of the total land area zoned for residential, commercial, or industrial use, pursuant to M.G.L. c. 40B, § 20, involves first calculating the "General Land Minimum" or the denominator of the land area equation.

760CMR56.03 (3) (b) General Land Area Minimum. For the purposes of calculating whether SHI Eligible Housing exists in the city or town on sites comprising more than 1½% of the

total land area zoned for residential, commercial, or industrial use, pursuant to M.G.L. c. 40B, § 20:

1. Total land area shall include all districts in which any residential, commercial, or industrial use is permitted, regardless of how such district is designated by name in the city or town's zoning by law;
2. Total land area shall include all un-zoned land in which any residential, commercial, or industrial use is permitted;
3. Total land area shall exclude land owned by the United States, the Commonwealth or any political subdivision thereof, the Department of Conservation and Recreation or any state public authority, but it shall include any land owned by a housing authority and containing SHI Eligible Housing;
4. Total land area shall exclude any land area where all residential, commercial, and industrial development has been prohibited by restrictive order of the Department of Environmental Protection pursuant to M.G.L. c. 131, § 40A. No other swamps, marshes, or other wetlands shall be excluded;
5. Total land area shall exclude any water bodies;
6. Total land area shall exclude any flood plain, conservation or open space zone if said zone completely prohibits residential, commercial and industrial use, or any similar zone where residential, commercial or industrial use are completely prohibited.
7. No excluded land area shall be counted more than once under the above criteria.

Numerator of Land Area Minimum Equation

Only sites of SHI Eligible Housing units inventoried by the Department or established according to 760 CMR 56.03(3)(a) as occupied, available for occupancy, or under permit as of the date of the Applicant's initial submission to the Board, shall be included toward the 1½% minimum. For such sites, that proportion of the site area shall count that is occupied by SHI Eligible Housing units (including impervious and landscaped areas directly associated with such units).

Hubbardston Land Area Minimum Performance

Table below, summarizes the calculation of the Land Area Minimum for Hubbardston as described in 760CMR56.03 (3).

Hubbardston has a total land area of 26,870 acres and 12,092 acres are anticipated to be excluded per regulations. Therefore 14,777 is the denominator of the land area minimum equation and are available for residential, commercial, and industrial uses. 1.5% of the General Land Area Minimum is 137 acres.

Hubbardston has 8.58 acres of land occupied by SHI approved housing. And currently has .06% of the available land area dedicated to affordable (SHI) housing.

The Housing Committee adopted the following definition of Landscape—to improve or maintain the appearance of an area of land, as by planting trees, ground cover, shrubs, natural vegetation or grass, or altering the contours of the ground.

Appendix IV summarized the calculation for the numerator of the land area calculation.

Summary of Hubbardston Total Land Area Minimum Calculation			
20-Oct-16			
Date As of		20-Oct-16	
Numerator			
Total SHI Area		8.58	
Denominator			
Total Land Area of Hubbardston		26,870.00	
State and Local Government Excluded		11,173.82	Updated per DCR Oct 15, 2016
Roads and Streets		539.88	
Water Bodies and Flood Zones		-	
Conservation Land Excluded		378.51	
Total Land Excluded		12,092.20	
Net Land Area		14,777.80	
Actual SHI Land Area %		0.06%	
Total Land Area Short to be at 1 1/2%		14,205.80	

Approval of this HPP by DHCD does not mean that DHCD is in agreement with the calculations/ analysis of the general land area minimum¹

Development Constraints and Mitigation

Available Land Area

Hubbardston is one of the smallest communities by population in the Commonwealth yet it is one of the largest in land area with 26,870 acres. 42% (11,173 acres) of the total land area is owned by state and local government.

9% of the land is in a flood zone and 1% of the land has a conservation restriction.

As noted in the chart of Hubbardston Land Area available for Development, 12,092 acres or 45% of land area is not available for development. The lack of land is the largest constraint to developing new housing properties. The Housing Committee is evaluating town owned land to determine what land could be sold or donated to a developer.

Hubbardston Land Area Available for Development			
	Date As of	20-Oct-16	
Total Land Area of Hubbardston		26,870.00	
State and Local Government Excluded		11,173.82	42%
Roads and Streets		539.88	2%
Conservation Land Excluded		378.51	1%
Total Land Excluded		12,092.20	45%
Available for Development		14,777.80	55%

¹ Suggested addition to HPP by DHCD, Phil DeMartino, Technical Assistance Coordinator, Office of Sustainable Communities, DHCD, January 26, 2017. See Addendum XI for a copy of Mr. DeMartino's report.

Housing Values

Housing values in Hubbardston are close to the affordable housing rates published by HUD. HUD rates for sale of affordable units (70% of 80% of the AMI for Western Worcester County are \$171,000 vs market rate for condos that range from \$230,000 to \$290,000. Refer to Appendix III. The difference of affordable prices to market rate prices are one of the lowest in the state making it difficult for a developer to under write cost of the affordable units. To offset the difference, the Committee is considering donating land to developers or making a contributing from CPA.

Infrastructure Needs

Water and Sewer

A major constraint and cost factor for new development relates to infrastructure, particularly the lack of sewer and water services throughout town that, with only minor exceptions, has the community completely reliant on wells and septic systems.

Water Quality

Hubbardston is home to regionally significant natural resources including the Chicopee (Ware River) Watershed and Millers River and Otter River Watersheds among many others. In fact, most of Hubbardston lies within the Ware River Watershed, which forms the headwaters of the Chicopee River. This Watershed is designated as “Outstanding Resource Waters” as it has exceptional socio-economic, recreational, ecological and aesthetic value. These waters are known for their high quality drinking water and are used as a source of water supply either to the Quabbin Reservoir or directly to the Wachusett Reservoir through the Quabbin Aqueduct. As such, they have more stringent requirements than other waters because the existing use is so exceptional or the perceived risk of harm is such that no lowering of water quality is permissible. Approximately 45% of the Town’s land area lies within these protective zones under the supervision of the Department of Conservation and Recreation, Division of Water Supply Protection. While regulations to protect the environment (e.g., wetlands, aquifers, septic systems) are important and essential, they present challenges to development by reducing the amount of buildable land and increasing the time and costs of developing new housing.

Transportation

To accommodate new development, MRPC build-out projections conducted in 2001 anticipated a maximum buildout of 105 miles of roadway from Hubbardston’s existing 88 miles. The 105 miles of roads was based on an additional population of 13,489 and an additional 4,618 houses. This anticipated increase in the population did not occur. Currently, the population is 4,398 with 1,631 houses. In view of present traffic and projected increases, it is essential that the Town evaluates and selects appropriate measures to relieve the impact of growth on traffic

yet still grow incrementally, a formidable challenge. It is also worth noting that public transportation is limited and residents must rely on the automobile, which presents an additional cost burden for those with limited incomes, particularly those on fixed incomes.

School Enrollment

Hubbardston has one school in town, the Hubbardston Center School that covers kindergarten through sixth grade. After that students attend the Quabbin Regional schools. Enrollments have been declining. For example, while the Hubbardston Center School is able to accommodate 500 students, as of February 2015 the enrollment was 315 students.

Availability of Subsidy Funds

State and federal financial resources to subsidize affordable housing preservation and production as well as rental assistance have suffered budget cuts over the years making it difficult to build the required new affordable housing.

Affordable Housing Goals

1. Increase housing opportunities and increase housing availability to a broad range of income levels.
2. Increase affordable housing opportunities in a sustainable and fiscally responsible manner for a broad range of income levels and needs.
3. Preserve Hubbardston's rural character as the town continues to grow.
4. Increase the supply of affordable rental units and subsidized units, especially for seniors.
5. Improve the condition of Hubbardston's present housing stock.
6. Promote homeownership.

While housing goals articulate a commitment to producing affordable housing in Hubbardston, it will be a challenge for the Town to create enough housing to meet the state's 10% affordable housing standard, production goals and local needs.

Implementation Strategies

The following is a description of Action Items that will be undertaken by the Town. Generally, these Action Items could be characterized as a mix of both short and long range strategies that could be implemented within an appropriate time frame based upon local official priorities. These short and long range goals are broken out in this plan.

Identification of Zoning Districts

As is the case in most American communities, a zoning bylaw or ordinance is enacted to

control the use of land including the patterns of housing development. Hubbardston's Zoning By-law were put in place to protect the water supply and accommodate septic systems in compliance with Title V requirements

Specific Sites and Town Owned Land

Refer to Addendum VII

Establish a Local Housing Committee

Hubbardston has appointed a municipal entity to deal with affordable housing issues in town. Hubbardston's Town government, as currently constituted, may not have the administrative capacity to handle the wide variety of affordable housing issues the Town may wish to initiate under this plan. Usually it is the Board of Selectmen that appoints such a Committee. The Selectmen need not obtain Town Meeting authority to establish such an entity but can do so if it believes that Town Meeting action will help lend legitimacy to the committee. Dealing with affordable housing issues is a fairly broad mandate, but there are specific tasks that a local housing Committee can undertake, such as:

- Inventory all government-owned buildings that may be suitable for affordable housing adaptive reuse, as well as government-owned properties that may have excess land that could be developed for affordable housing.
- Prepare and update the Town's housing strategy and planning documents.
- Serve as the Town's official advocate for affordable housing.
- Evaluate tax title properties that may be suitable for affordable housing.
- Apply for the various State and Federal affordable housing grant opportunities.
- Monitor on an annual basis those accessory apartments that agree to affordability use restriction as part of their approval (more on this in the next recommendation).
- Manage the lottery system for those affordable housing units created through the Local Initiative Program (LIP) or through a Chapter 40B Comprehensive Permit.
- Provide outreach and education to the community regarding affordable housing.

There are several entities that could advise Hubbardston on how to establish a local housing Committee and get them started, including the Massachusetts Housing Committee and the MA Department of Housing and Community Development.

Develop a Comprehensive Zoning Rules and Regulations

The Town has created and published a permitting process and regulations (Comprehensive Development Permitting Rules and Regulations) to assist all customers with projects of

any type and scale or that need to obtain any permit and has developed separate handouts for more substantive processes that require additional detail or guidance. These rules and regulation were adopted by the Zoning Board and a town wide training program was conducted that was attended by 40 citizens.

Identify New Areas for Housing/Economic Development Opportunities

The Committee had reviewed the local zoning bylaws and determined adequacy for accommodating desired land use and development within the community. The current zoning bylaws seem to contain a thorough list of possible land uses that should cover most situations in Hubbardston, but an examination of the method of approval could also be conducted. Also, without the rezoning of land in Hubbardston the location of new businesses and types of housing could be very limited.

Utilize Community Preservation Act funds to Promote Housing

The Community Preservation Act (CPA) is a smart growth tool that helps communities preserve open space and historic sites, create affordable housing, and develop outdoor recreational facilities. Many communities throughout Massachusetts participate, including the Town of Hubbardston. The Act requires that a community spend or set aside for later spending at least 10% of the revenues collected annually for the creation, preservation, or support of community housing. Community housing is defined as housing for households earning up to 100% of a community's area median income.

The Housing Committee has established the following Strategies and has proposed the CPC fund the Committee \$50,000 to implement the following strategies.

1. Make suitable public property available for affordable housing
2. Partner with private developers—the Housing Committee is currently meeting with several developers including Habitat for Humanity to determine if such housing in Town could be developed.
3. Convert existing housing to affordability—the Housing Committee is identifying properties in Town that potentially could be taken for tax delinquencies and converted to affordable housing.

Education and Outreach Efforts and Committees

Education and training of local officials related to economic development, housing, social issues, community planning, etc. should be encouraged. MRPC hosts such training during the Fall (generally October/November) offered by the Citizens Planners Training Collaborative (CPTC) and MRPC intends to continue similar training in the future. CPTC also offers multiple sessions at their annual March Conference in Worcester. The community should offer financial support to allow local officials to attend such training opportunities.

Housing Needs Assessment and Projection of Future Growth

Population

The 2010 Census counted 4,382 residents in Hubbardston, an increase of 473 persons from the 2000 Census count of 3,909 residents. Table 1 below presents Hubbardston's growth in population since 1970, as well as the Town's projected population for the year 2020. Hubbardston experienced very high increase in percentage of population between the years 1970 and 2000 (ranging from 25.1% in the 1970's to an astounding 55.6% increase during the 1990's).

Population increase from the year 2000 to 2010 was slower than previous decades (12.1%) but was still very high compared to the Montachusett region in its entirety. For example, between the years 2000 and 2010, the Montachusett Region population increased by 3.7% exceeding the state rate of 3.1%. According to the population forecast, Hubbardston's population rate could be moderate over the next ten years (118 persons or about a 2.69% increase).

Table 1
Hubbardston Population Growth and Forecast

Year	# of People	Numerical Change	% Change
1970	1,437	-----	-----
1980	1,797	360	25.1%
1990	2,797	1,000	55.6%
2000	3,909	1,112	40.0%
2010	4,382	473	12.1%
2020	4,500	118	2.69%

Source: U.S. Census Bureau and MassDOT (2020 Population Projection).

Not surprisingly, Hubbardston and its small town neighbors had high rates of population growth during the last 30 years, see Table 2 below. This was due mostly to these small towns having available large tracts of vacant developable land.

Table 2
Population Growth – Comparable Communities

Year	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
1980	1797	4075	2425	6070	5139
1990	2797 (55.6%)	5433 (33.3%)	3189 (31.5%)	6438 (6.06%)	6191 (20.5%)
2000	3909 (40.0%)	5546 (2.1%)	3353 (5.1%)	6799 (24.46%)	6907 (11.6%)
2010	4382 (12.1%)	6081 (9.7%)	3413 (1.8%)	8013 (17.86%)	7277 (5.4%)

Source: U.S. Census Bureau

Housing Growth

The housing stock within Hubbardston grew significantly over the last few decades outpacing population growth; the last ten years was no exception when housing unit growth (22.2%) outpaced the growth in population (12.1%). See Table 3. Between 2000 and 2010, most growth probably took place from 2000 until 2007 when the national recession began.

Table 3
Hubbardston Housing Unit Growth

Year	# of Housing Units	Numerical Change	% Change
1980	623	--	--
1990	1025	402	(64.5%)
2000	1360	335	(32.7%)
2010	1662	302	(22.2%)
2020	1912	250	(15.0%)

Source: U.S. Census Bureau

Table 4
Housing Unit Growth – Neighboring Communities

Year	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
1980	623	1849	NA	2,082	1982
1990	1025 (64.5%)	2279 (23.2%)	1103	2276 (9.3%)	2405 (21.3%)
2000	1360 (32.7%)	2204 (-3.3%)	1196 (8.4%)	2597 (14.1%)	2694 (12.0%)
2010	1662 (22.2%)	2599 (17.9%)	1339 (11.9%)	3139 (20.9%)	2960 (9.9%)

Source: U.S. Census Bureau

Table 4 shows that Hubbardston's housing stock grew at a faster rate than all neighboring communities during the last 30 years.

Housing Unit Inventory

Table 5 below indicates that single family homes make up the vast majority (89.1%) of the Town's housing stock. In terms of multi-family units (defined as housing containing three or more units), the Town has only 145 such units. However, Table 6 compares the Town's housing stock with abutting communities, and Hubbardston has more multi-family units than Ashburnham (67) and Princeton (61) and fewer than Templeton (183) and Westminster (189).

Table 5
Type of Housing Units

Type of Unit	# of Units	Percentage of Total
One Unit	1,421	89.1%
Two Units	29	1.8%

Three to Four Units	56	3.5%
Five or More Units	89	5.5%
Mobile Homes	0	0%
Total	1595	99.9%

Source: American Community Survey 2008-2012 Five Year Estimates

Table 6
Type of Housing Units in Neighboring Communities

Town	One Unit	Two Units	3-4 Units	5+ Units	Mobile Homes
Hubbardston	1,421	29	56	89	0
Ashburnham	2,643	0	67	0	31
Princeton	1135	47	44	17	9
Templeton	2,763	150	111	72	51
Westminster	2,642	69	63	126	0

Source: American Community Survey 2008-2012 Five Year Estimates

Hubbardston's housing mix has been fairly stable over the past few decades. The percentage of single-family homes continues to grow faster than multi-family housing units during this period.

Age of Housing Stock

Table 7
Age of Housing Stock

Year Structure Built	Number of Units	% of Housing Stock
2010 or Later	7	0.4%
2000-2009	254	15.9%
1990-1999	349	21.9%
1980-1989	410	25.7%
1970-1979	145	9.1%
1960-1969	96	6.0%
1950-1959	32	2.0%
1940-1949	20	1.3%
1939 or earlier	282	17.7%

TOTAL	1,595	100%
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Source: American Community Survey 2008-2012 Five Year Estimates

Table 7 above indicates that approximately 17.7% of Hubbardston's housing stock was built before World War II. This is fairly unusual for a rural Massachusetts community where the pre-WWII housing stock often makes up one third to half of a community's housing stock. It is indicative of a relatively new community where the majority of its growth has occurred in the last fifty years. Still, it's worth pointing out that 43% of the housing stock is over 50 years old and many of these units may be in need of rehabilitation. Towards that end, the Town has successfully attempted to secure housing rehabilitation funds from the Community Development Block Grant (CDBG) program, operated through the federal Department of Housing and Urban Development (HUD).

Housing Occupancy

Table 8
Type of Occupancy in Comparable Communities 2010

Town	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
Ownership	1417 (90%)	1,928 (90%)	1,172 (92%)	2,393 (83%)	2,342 (86%)
Rental	149 (10%)	220 (10%)	107 (8%)	489 (17%)	374 (14%)

Source: U.S. Census 2010

Table 8 above indicates that approximately 90% of Hubbardston's housing stock is owner-occupied, which is right in line with the figures for its rural neighbors and much higher than the surrounding cities of Gardner, Fitchburg, and Leominster. While only 10% of the Town's housing stock consists of rental units, this is still a higher percentage than neighboring Princeton and the same as Ashburnham.

Table 9 shows vacancy rates for Hubbardston and comparable communities. Hubbardston has a lower vacancy rate than Ashburnham, Templeton, and Westminster and a slightly higher vacancy rate than Princeton. Of course, vacancy rates have increased across the region in recent years, a product of the national recession and the collapse of the housing market. Since the year 2000, the vacancy rate in Hubbardston jumped from 3.8% to 5.78% over a ten-year timeframe, adding 44 units to the Town's inventory of vacant housing units for a total of 96 vacant units.

Table 9
Vacancy Rates

Town	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
% Vacant	5.78%	17.35%	4.48%	8.19%	8.24%

Source: U.S. Census 2010

Types of Households

Table 10 indicates that about 82% of Hubbardston's households consist of family-oriented households, which is higher than comparable communities and indicative of a stable community.

Table 10
Households by Type: Comparable Communities

	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
Family Households	1,239 (82%)	1,522 (67%)	953 (79%)	2,206 (78%)	1,942 (73%)
Non-Family Households	274 (18%)	756 (33%)	253 (21%)	633 (22%)	730 (27%)

Source: American Community Survey 2008-2012 Five Year Estimates

Income Expended on Housing

Table 11 indicates almost a third of Hubbardston's residents (31.5%) who own a home and have a mortgage are paying more than 30 percent of their income towards monthly mortgage payments and other selected housing costs (e.g., taxes and insurance). Housing is generally considered affordable when it requires 30 percent or less of its occupants' income. The percentage of Hubbardston residents exceeding the 30 percent value is less than the County (35.7%), the State (39.0%), and the U.S. (36.8%).

A high percentage of renters in Hubbardston (83.5%) are paying more than 30 percent of their income toward monthly rent costs. This proportion of renters is significantly greater than renters paying more than 30 percent of their income in the County (48.0%), the State (50.3%), and the U.S. (52.1%).

Table 11: Percentage of Income Used for Mortgage or Rent

Household Type	Hubbardston # Units	Hubbardston % Units	Worcester Co. % Units	MA % Units	U.S. % Units
Households with mortgages below or at 30% of total annual household income	747	68.5%	64.4%	61.0%	63.2%
Households with mortgages more than 30% of total annual household income	343	31.5%	35.7%	39.0%	36.8%
Households with rent costs below or at 30% of total annual household income	19	16.5%	52.0%	49.7%	47.9%

Households with rent costs more than 30% of total annual household income	96	83.5%	48.0%	50.3%	52.1%
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Source: American Community Survey 2008-2012 Five Year Estimates

Cost of Housing in Hubbardston

Table 12 provides historic statistics for home sales and median sale prices in Hubbardston for the past ten years. As shown, prices in general have declined in recent years from their peak in 2006 although the annual number of units sold is recovering from the low point in 2008.

Table 12: Home Sales and Median Sales Price

Year	Price
2013	\$214,400
2012	\$211,000
2011	\$165,000
2010	\$201,250
2009	\$215,000
2008	\$236,100
2007	\$242,000
2006	\$259,000
2005	\$256,250
2004	\$257,500
2003	\$230,495

Source: The Warren Group, 2014

The housing downturn which significantly impeded the housing market from 2006 until recently not only resulted in a decrease of new building activity, but also an increase in the rate of foreclosures during this period across the Country, the Commonwealth of Massachusetts, and the Montachusett Region. Based on information provided by the Warren Group and presented in Table 13, Hubbardston experienced a relatively modest amount of foreclosures (actual transfer of ownership to a purchaser at a foreclosure sale). And, in the period reported for 2013, there was just one foreclosure. This may be due to an improving real estate market but also processing slowdowns due to a new 2012 state law that requires lenders to notify borrowers of their right to pursue loan modifications before foreclosing.

**Table 13
Number of Foreclosure Deeds by Calendar Year**

Year	Period	1-Fam	Condo	All
2013	Jan - Dec	1	0	1
2012	Jan - Dec	9	1	9
2011	Jan - Dec	5	0	6

2010	Jan - Dec	7	0	7
2009	Jan - Dec	0	0	0
2008	Jan - Dec	0	0	0
2007	Jan - Dec	0	0	0

Source: The Warren Group

another factor which should be considered relevant to the current status of housing in Hubbardston is the status of empty and/or vacated homes. According to the 2010 U.S. Census, there were 96 vacant housing units in Hubbardston in 2010.

Population Age Characteristics

A detailed breakdown of the Town of Hubbardston's 2010 population by age is provided in Table 14. A comparison of 2000 and 2010 Census data reveals some findings. The population of residents 65 to 84 years and over increased by 51.6% and 52.0% respectively since the year 2000. But the population of residents between 55 to 64 years of age (the "soon to be" seniors), more than doubled (in 2000 this age group had only 268 persons, which more than doubled to 626 in 2010). The increase in seniors and "soon to be" seniors" has implications for the Town's housing policies.

Table 14
Population Characteristics by Age

Age Group	2000 Count	2010 Count	% Increase
Total Population	3,909	4,382	12.1%
Under 5 Years	293	211	(28.0%)
5 to 19 Years	1,006	1,014	0.8%
20-34 Years	591	567	(4.1%)
35 to 54 Years	1,480	1,553	4.9%
55 to 64 Years	268	626	133.6%
65 to 84 Years	246	373	51.6%
85 Years and over	25	38	52.0%

Source: U.S. Census Bureau

Racial Composition

Table 15 indicates that Hubbardston's population is largely white followed by Hispanic and additional races. Within the Montachusett Region, the minority population is predominantly concentrated in urban areas but is also increasing in the majority of suburban/rural areas.

Table 15
Hubbardston Racial Composition

Year	Total	White	Black	Hispanic	As Noted **	Other Race	Two or More Races
2010	4382	4225	21	63	22	7	44
2000	3909	3846	6	52	22	N/A	N/A
1990	2797	2755	7	27	8	N/A	N/A

**American Indian, Asian, Pacific Islander

Source: U.S. Census Bureau

In terms of race/ethnicity in the public school systems serving communities that are comparable to other towns, Table 16 compares Hubbardston and a few surrounding schools to Massachusetts in its entirety. When compared, the local schools listed indicate a significantly higher percentage of white students when compared to the state.

Table 16
2012 – 2013 School Enrollment Report (all grades) by Race/Ethnicity

District	%African American	% Asian	% Hispanic	%Native American	% White
MA	8.6%	5.9%	16.4%	0.2%	66.0%
Hubbardston (Quabbin Regional School District)	0.4%	0.5%	3.8%	0.1%	92.7%
Ashburnham (Ashburnham/Westminster School District)	0.7%	1.0%	3.7%	0.1%	92.8%
Princeton (Wachusett Regional School District)	1.3%	2.9%	4.0%	0.1%	89.6%
Templeton (Narragansett Regional School District)	1.0%	0.3%	1.9%	0.3%	93.6%
Westminster (Ashburnham/Westminster School District)	0.7%	1.0%	3.7%	0.1%	92.8%

Source: MA Department of Education

Measures of Wealth

There are measures of wealth that describe the incomes of local residents and also reflect the health of the local economy: per capita, median household and median family incomes, as well

as the percent of people for whom poverty status was determined. Per capita income is equal to the total incomes generated by a population divided by the number of persons in that area. Communities with higher number of persons per household or smaller household incomes would likely have smaller per capita income figures. The per capita income for the State of Massachusetts was \$35,485, while that of Hubbardston was \$31,347, below the State average by \$4,138. In Table 17 it is also evident that Hubbardston has a lower per capita income than some of its neighboring communities, with the exception of Templeton.

Table 17
Measures of Wealth

Community	Per Capita	Median Household	Median Family	Below Poverty
Hubbardston	\$31,347	\$77,694	\$87,548	7.0%
Ashburnham	\$35,060	\$81,690	\$97,692	5.7%
Princeton	\$43,774	\$109,008	\$121,673	4.4%
Templeton	\$26,360	\$68,942	\$76,792	12.9%
Westminster	\$31,891	\$80,294	\$95,543	5.1%
Massachusetts	\$35,485	\$66,658	\$84,380	11.0%

Source: American Community Survey 2008-2012 Five Year Estimates

The Federal Poverty Level is published yearly based on family size and is as noted in Table 17A.

Table 17A
2016 Federal Poverty Level

Family Size	100% Federal Poverty Level
1	\$11,880
2	\$16,020
3	\$20,160
4	\$24,300
5	\$28,440
6	\$32,580

Another measure of wealth in a community is its median income, which is based on the type of household. In Table 17, family incomes are differentiated from other household incomes. For example, a single student living alone is considered a household but not a family. According to the American Community Survey 2008-2012 Estimates, Hubbardston's median household income (\$77,694) is more than the state rate (\$66,658) but lower than neighboring communities with the exception of Templeton (\$68,942). Hubbardston's median family income (\$87,548) is also above the state rate of \$84,380 but less than Ashburnham and Westminster, and, substantially less than Princeton (\$121,673). There is also much less poverty in Hubbardston (7%) when compared to the State as a whole (11%).

Any effort to increase economic activity in Hubbardston should focus on increasing wages and creating new jobs for the Hubbardston labor force. There are some ways in which economic development efforts can support these goals. They include attracting and retaining businesses with good-paying jobs; stabilizing residential property tax rates; encouraging local entrepreneurship, and providing social services, such as subsidized daycare and pre-schools to support single-parent families and households with two working parents.

Hubbardston's Labor Force

As can be seen in Table 18, the number of employed Hubbardston residents was increased from 2003 (2,261 persons employed) until the beginning of the economic recession in 2007 (2,377 persons employed). Conversely, Hubbardston's local unemployment rate increased from a low of 4.9% in years 2004 through 2007 to a high of 8.8% by the year 2009. Hubbardston's unemployment rate has since slightly decreased to 6.4% and 7.3% in the years 2012 and 2013 respectively.

Of course, Hubbardston's unemployment rate is closely tied to that of the state and the nation as a whole, both of which saw similar increases in unemployment. However, it should be noted that Hubbardston's unemployment rate is usually higher than that of the state, suggesting that Hubbardston residents have been more prone to layoffs than other communities when the state's economy declines. Recently there has been some improvement in the national and state unemployment rates and this is expected to continue, albeit slowly. However, the unemployment rate for the latest month available (for February 2014 only) was 7.6%%, once again this is higher than the state rate for the same month (6.8%). While the economy continues to struggle, higher education in Hubbardston should be a priority.

Table 18
Hubbardston Labor Force Employment Numbers and Unemployment Rate over
Time Vs. the Unemployment Rate for the State

Year	Labor Force	Employed	Unemployed	Unemployment Rate	State Unemployment Rate
2013	2,422	2,246	176	7.3%	6.9%
2012	2,404	2,251	153	6.4%	6.7%
2011	2,433	2,350	183	7.5%	7.4%
2010	2,439	2,228	211	8.7%	8.5%
2009	2,494	2,274	220	8.8%	8.2%
2008	2,462	2,327	135	5.5%	5.3%
2007	2,500	2,377	123	4.9%	4.5%
2006	2,485	2,362	123	4.9%	4.8%
2005	2,436	2,317	119	4.9%	4.8%
2004	2,399	2,282	117	4.9%	5.2%
2003	2,401	2,261	140	5.8%	5.8%

Source: MA Department of Labor and Workforce Development

The Number and Types of Jobs in Hubbardston

The Massachusetts Division of Unemployment Assistance (DUA) is the State entity in charge of tracking the changes taking place in the various sectors of the State's economy at both the state and local levels. Table 19 presents the changes that took place in Hubbardston's local economy from 2008 to 2012. The number of establishments decreased during this five- year period by 3 (or -4.2%). Likewise, employment decreased, losing 40 workers or 7.5% of the employment base in Hubbardston. The largest loss occurred during the height of the economic recession between 2008 and 2009 and smaller losses continued to occur in 2010, and 2012.

Historically speaking, the cyclical nature of the regional economy has resulted in Hubbardston gaining jobs during one decade, losing jobs the next, and so on although the recent economic downturn has been nationally recognized as the most severe in decades.

While total wages decreased by 4.2%, the average weekly wage did increase by 3.6% during the period despite the loss of total employment. But, impacts of the economic recession are still very much evident since the Consumer Price Index for the nation increased by about 7.0% during the period, indicating that inflation outpaced wages in Hubbardston.

Table 19
Employment and Wages in Hubbardston

	2008	2009	2010	2011	2012	Change	
Establishments	71	68	69	75	68	(3)	(-4.2%)
Total Wages (Million \$)	\$15.93	\$15.93	\$14.55	\$15.27	\$15.26	(\$0.67)	(-4.2%)
Average Employment	532	501	477	500	492	(40)	(-7.5%)
Average Weekly Wage	\$576	\$612	\$587	\$588	\$597	\$21	3.6%

Source: Massachusetts Division of Unemployment Assistance

Table 20 provides information on the type of jobs found in Hubbardston. The largest number of jobs is found in Health Care and Social Assistance, with about 54 jobs. Other leading jobs of the local economy include Construction (51 jobs), and Manufacturing (45 jobs). The best paying jobs are Construction (\$767 per week), Professional and Technical Services (\$658 per week), Retail Trade (\$586 per week), and Health Care and Social Assistance (\$536 per week). The lowest paying jobs are Accommodation and Food Services (just \$157 per week).

Table 20
Hubbardston Workforce by Sector

	Establishments	Total Wages	Avg. Employment	Avg. Weekly Wage
Construction	13	\$2,033,445	51	\$767
Manufacturing	4	\$1,100,933	45	\$470
Retail Trade	4	\$822,158	27	\$586
Professional and Technical Services	4	\$718,771	21	\$658
Health Care and Social Assistance	5	\$1,504,678	54	\$536
Accommodation and Food Services	4	\$220,464	27	\$157
Other Services, Ex. Public Admin	14	\$692,769	30	\$444

Source: Massachusetts Division of Unemployment Assistance

Table 21 allows for a comparison of the number of jobs in comparable towns. The Table also provides 2012 employment and wages to compare Hubbardston with some neighboring communities.

Table 21
Employment and Wages – Year 2012 Comparison

	Hubbardston	Ashburnham	Princeton	Templeton	Westminster
Establishments	68	118	78	123	190
Total Wages	\$15,261,868	\$40,702,842	\$20,432,906	\$73,711,626	\$132,391,238
Avg. Employment	492	982	782	1,765	2,467
Avg. Weekly Wage	\$597	\$797	\$502	\$803	\$1,032

Source: Massachusetts Division of Unemployment Assistance

Table 21 indicates that Hubbardston has fewer establishments, total wages, and average employment than neighboring communities. The average weekly wage is only higher than Princeton. To improve its economy, Hubbardston should strategize and seek to diversify its economy by attracting higher paying jobs.

Education

As shown in Table 23, residents with a high school diploma, but no higher education, represent the largest segment of the Hubbardston population in terms of educational attainment – this is higher than neighboring communities except for Templeton. The second largest group (20.1%) has Some College/No Degree, which is higher than the state average and more than neighboring communities except Templeton, which is also at 20.1%. This is followed by residents with a Bachelor's Degree (17.5%), higher than the Town of Templeton (10.2%) but less than the state (22.2%) and other neighboring communities.

The state percentages reveal how the population in Hubbardston compares to the overall state population in terms of educational attainment. Overall, the state data contains higher numbers in the groups at both the upper and lower echelon of the educational attainment spectrum than the Hubbardston data since more than 10.9% of the state's population is reported to have less than a high school education – more than the rate of Hubbardston (6.4%) and the state has a considerable higher percentage of those with a Graduate/Professional Degree (16.8%) than Hubbardston (8.6%). This could be due in part that more Hubbardston residents might be attending a high school level trade school (Montachusett Technical Vocational High School is located in nearby Fitchburg). It is a well-known fact that there has been a disproportionate share of job losses in construction during this recession. This could potentially impact Hubbardston more than the rest of the Commonwealth and could be, in part, responsible for chronically higher unemployment statistics in Hubbardston than the rest of the Commonwealth. In terms of surrounding communities, a real standout is Princeton's

high percentage of those with a Bachelor's Degree (39.0%) and Graduate/Professional Degree (24.5%) which is much higher than other neighboring communities and the state as a whole.

Table 23
Educational Attainment - Population 25 Years and Over

Amount of Education	Hubbardston	Ashburnham	Princeton	Templeton	Westminster	State
No High School Diploma	6.4%	4.1%	2.0%	10.3%	7.6%	10.9%
High School Diploma	36.0%	29.8%	15.1%	39.8%	26.9%	25.9%
Some College, No Degree	20.1%	18.5%	11.5%	20.1%	18.0%	16.6%
Associate's Degree	11.3%	12.4%	7.9%	12.9%	11.6%	7.7%
Bachelor's Degree	17.5%	20.8%	39.0%	10.2%	23.5%	22.2%
Graduate or Prof. Degree	8.6%	14.5%	24.5%	6.8%	12.6%	16.8%
Total Population 25 Years and Over	2,952	4,143	2,362	5,391	5,060	4,465,898

Source: American Community Survey 2008-2012 Five Year Estimates

There are numerous public school districts within the region educating young persons from pre-kindergarten through high school and private schools educating residents at approximately the same age levels. The area also has new charter schools. As previously indicated, Montachusett Technical Vocational High School is located in Fitchburg offering trade school curriculum at the high school level. Located in Gardner, Mount Wachusett Community College (MWCC) offers two-year programs while Fitchburg State University offers four-year programs. In addition, there are many private sector educational operators offering training courses. The North Central Massachusetts Workforce Investment Board, Inc. promotes the economic and social welfare of the region through education, employment and training programs that increase employability of young people and adults.

Economic Sector Contribution to Local Tax Base

In fiscal year 2014 Hubbardston levied a total of \$5,867,618 in taxes, based on a local tax rate of \$14.52 per \$1,000 of assessed valuation. Hubbardston homeowners accounted for roughly 94.7% of the total tax base while the business and industries accounted for 3.55%. The remainder (1.75%) was derived from taxes on personal property. Table 24 and 25 show how Hubbardston compares to some of its neighbors in terms of commercial and industrial tax base.

Table 24
Commercial Tax Base Comparison

Community	FY2014 Tax Rate	Commercial Taxes Levied	Assessed Valuation	% Total Tax Levy
Hubbardston	14.52	\$135,622	\$9,340,355	2.31%
Ashburnham	19.83	\$257,050	\$12,962,705	2.31%
Princeton	17.24	\$98,738	\$5,727,258	1.30%
Templeton*	14.12	\$482,338	\$34,159,934	6.29%
Westminster	18.98	\$1,059,589	\$55,826,616	6.80%

Source: Department of Revenue

*FY2014 Data Not Available For Templeton – FY2013 Data had to be Utilized as an Alternative

Table 24 indicates that Hubbardston's commercial sector raises a higher amount of tax dollars when compared to Princeton, but significantly less than Ashburnham, Templeton and particularly Westminster. Hubbardston's Assessed Valuation is lower than nearby communities with the exception of Princeton. Hubbardston has a larger percent of commercial taxes contributing the overall percentage of tax levy than Princeton but significantly less than Templeton and Westminster.

Table 25
Hubbardston's Tax Levy 2010-2014 (with rate)

Fiscal Year	Tax Rate	Residential	Commercial	Industrial	Personal Property	Total
2010	10.69	\$4,801,444	\$179,593	\$165,389	\$107,780	\$5,254,206
2011	11.33	\$4,751,065	\$180,757	\$81,337	\$106,565	\$5,119,724
2012	12.70	\$5,120,417	\$190,313	\$86,105	\$115,919	\$5,512,754
2013	13.64	\$5,314,758	\$203,284	\$75,975	\$100,402	\$5,694,419
2014	14.52	\$5,558,948	\$135,622	\$73,002	\$100,046	\$5,867,618

Source: Department of Revenue

Table 25 highlights the change in tax rate, and change in total levied taxes for Hubbardston from 2010-2014. Since 2011, Hubbardston's tax rate, and total tax levy has increased each year. From 2011- 2014 the tax rate increased from 11.33 to 14.52, while the Town was able to generate increases in overall levied taxes due largely to increases in the residential sector. Currently, Hubbardston's tax rate is 14.52, less than Ashburnham, Princeton, and Westminster, but just slightly more than Templeton.

Hubbardston's 2013 average single-family home tax bill (\$3,286) appears relatively advantageous when compared to Ashburnham, Westminster, and particularly Princeton, see Table 26, but it is not quite as low as Templeton (\$2,366). Hubbardston's average single-family home tax bill in the year 2003 was just \$2,086, and adjusting for inflation this is about a 19% increase over the last decade when \$2,086 had the same buying power of \$2,641. Templeton's adjacent neighbors also experienced some rise in their average single-family home tax bills over the course of the last decade.

Table 26
Year 2014 Average Single Family Home Tax Bill

Community	Average Single Family FY2014 Tax Bill
Hubbardston	\$3,286
Ashburnham	\$3,997
Princeton	\$5,236
Templeton*	\$2,366
Westminster	\$4,364

Source: Massachusetts Department of Revenue.

Appendix

Appendix I—Summary of Housing Strategies

Housing Strategies				
Strategy	Year 1 - 2	Year 3-4	# Affordable Units	Responsibility Party
Capacity Building Strategies				
Ongoing community Support				
Secure professionals Support				
Zoning and Planning				
Allow affordable housing on non-conforming lots	X	X		PB, ZBA
Promote affordable housing in mixed use developments	X	X		PB
Create inventory of Town owned land		X		Housing Committee
Housing Production Strategies				
Partner with private Developers		X	6	BOS, Housing Committee
Convert existing housing to affordable housing			12	Housing Committee




Appendix II—Housing Development Time Line

Production Programs		
Strategies	Affordable Units	Cum Units
Year 1 -2015		
SHI as of Dec 2015		49
Year 2- 2016		
Convert Existing Units	2	51
Year 3 – 2017		
Convert Existing Units	1	52
Group Homes	1	53
Year 4 – 2018		
Convert Existing Units	2	55
Year – 4 2018		
Convert Existing Units	3	57

Appendix III-40B Prices for SFH and Market Prices for Condos

Hubbardston 40B Prices				27-Feb-16
Purchase Price Limits				
Housing Cost: Hubbardston, Fitchburg-Leominster				
	1 Bedroom	2 Bedroom	3 Bedroom	
Sales Price	\$158,000	\$177,000	\$194,000	
5% Down payment	\$7,900	\$8,850	\$9,700	
Mortgage	\$150,100	\$168,150	\$184,300	
Interest rate	3.70%	3.70%	3.70%	
Amortization	30	30	30	
Monthly P&I Payments	\$690.88	\$773.97	\$848.30	
Tax Rate	\$15.90	\$15.90	\$15.90	
monthly property tax	\$209	\$235	\$257	
Hazard insurance	\$53	\$59	\$65	
PMI	\$98	\$109	\$120	
Condo/HOA fees (if applicable)	\$100	\$120	\$150	
Monthly Housing Cost	\$1,150	\$1,297	\$1,440	
Income Window				
Necessary Income for Mortgage:	\$46,019	\$51,872	\$57,593	
Maximum Income	\$52,650	\$59,250	\$65,800	
Income Window	\$6,631	\$7,378	\$8,207	
Household Income:				
# of Bedrooms	1	2	3	
Sample Household size	2	3	4	
80% AMI/"Low-Income" Limit	\$52,650	\$59,250	\$65,800	
Target Housing Cost (80%AMI)	\$1,316	\$1,481	\$1,645	
10% Window (7/8 of 80%)	\$46,069	\$51,844	\$57,575	
Target Housing Cost 30% of (70%AMI)	\$1,152	\$1,296	\$1,439	
Rental Prices				
Rent/Mo- Hubbardston, Fitchburg Leominster				
	1 Bedroom	2 Bedroom	3 Bedroom	
Family Income (80% AMI)	\$52,650	\$59,250	\$65,800	
Rent/Mo	\$1,093	\$1,300	\$1,501	
less Utilities	\$135	\$195	\$239	
Contract Rent	\$958	\$1,105	\$1,262	

Market Prices for Condos in Hubbardston in Spring of 2016

 <p>30 Photos</p>	<p>20 Moosehorn Hill Circle #20 Register to see price Hubbardston, MA 01452 Quabbin School District 2 bed 3 bath 1,690 sq ft \$138 / sq ft CND Lot Size N/A sq ft On Site 27 days</p> <p>★ Save View All Details</p> <p><small>Listing Provided Courtesy of Herbert Mason, Century 21 Denham Realty</small> Popularity <div></div></p>	<div>\$233,200</div>
 <p>1 Photo</p>	<p>2 Madison Way #1 Register to see price Hubbardston, MA 01452 Quabbin School District 2 bed 3 bath 1,620 sq ft \$181 / sq ft TWN Lot Size N/A sq ft On Site 30 days</p> <p>★ Save View All Details</p> <p><small>Listing Provided Courtesy of Bailey Labele, Quabbin Real Estate</small> Popularity <div></div></p>	<div>\$293,200</div>
 <p>1 Photo</p>	<p>4 Madison Way #2 Register to see price Hubbardston, MA 01452 Quabbin School District 2 bed 2 bath 1,130 sq ft \$230 / sq ft CND Lot Size N/A sq ft On Site 30 days</p> <p>★ Save View All Details</p> <p><small>Listing Provided Courtesy of Bailey Labele, Quabbin Real Estate</small> Popularity <div></div></p>	<div>\$259,900</div>

Appendix IV—40B Performance

Land Area Minimal

Summary of Hubbardston Total Land Area Minimum Calculation		
		20-Oct-16
	Date as of	20-Oct-16
Numerator		
	Total SHI Area	8.58
Denominator		
	Total Land Area of Hubbardston	26,870.00
	State and Local Government Excluded	11,173.82
	Roads and Streets	539.88
	Water Bodies and Flood Zones	-
	Conservation Land Excluded	378.51
	Total Land Excluded	12,092.20
	Net Land Area	14,777.80
	Actual SHI Land Area %	0.06%
	Total Land Area Short to be at 1 1/2%	14,205.80

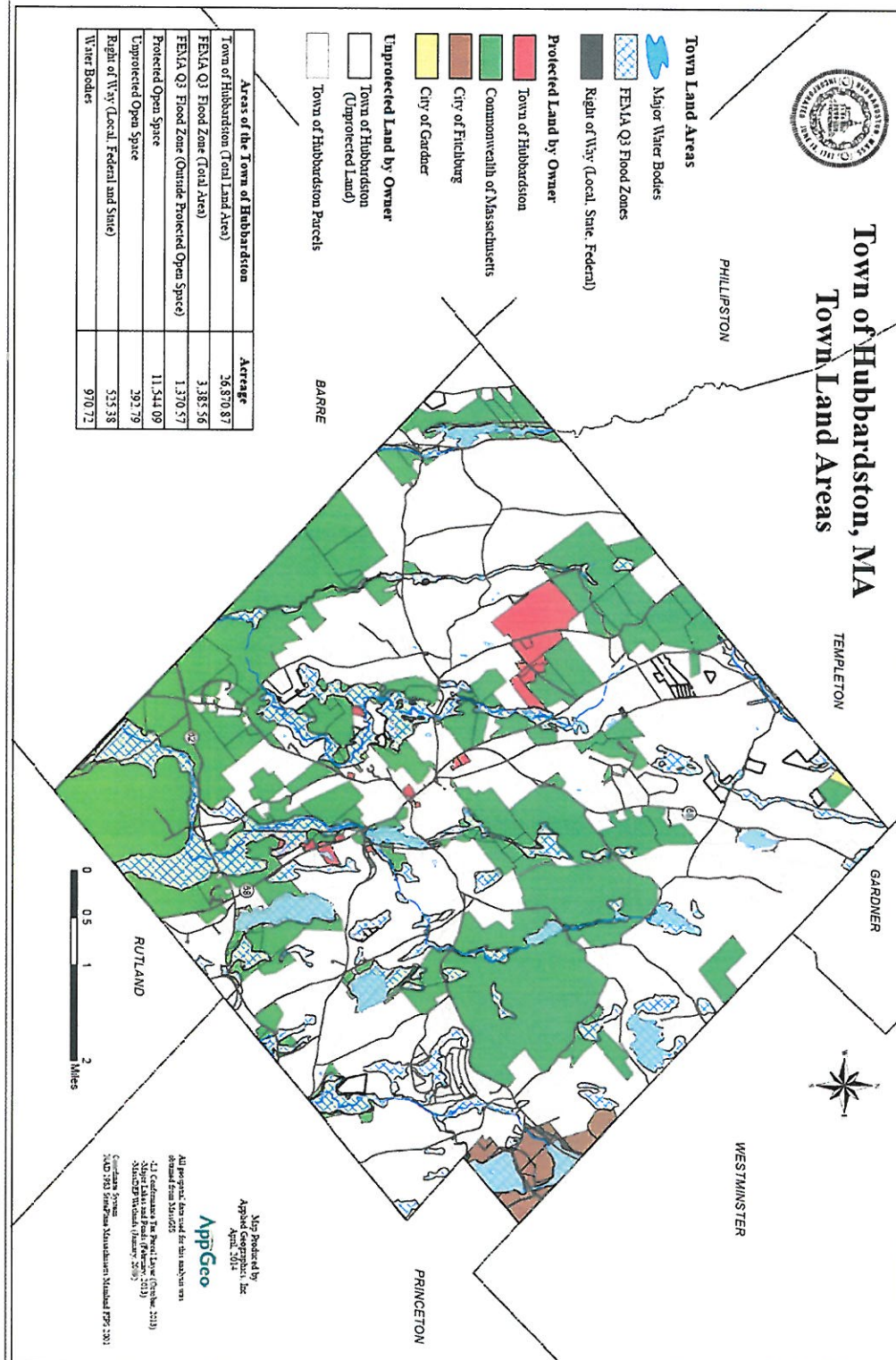
Detail of State and Local Government Excluded		
	20-Oct-16	
	City Fitchburg/Gardner	474.16
	Commonwealth of Mass	-
	DCR Land- Ware Riv Watershed Total	8,506.14
	Other State Owned Land	1,400.00
	2016 DCR Purchase	85.00
	Town of Hubbardston	708.52
	State and Local Government Excluded	11,173.82
	Assessors Report	
	Assessors Diane Peterson	
	J. Zimmerman (see DCR Oct 2016)	
	L. Gustavsen, (DCR Oct 2016)	
	L. Gustavsen, (DCR Oct 2016)	
	Assessors Report	

Hubbardston Total Affordable Unit Count Against 10% Goal			
	Apr-13	Dec-14	Jan-15
Total Census Units	1627	1627	1627
Needed for 10%	163	163	163
Actual SHI Units	52	49	
SHI %	3.2%	3.0%	3.0%
HPP Goal %	0.50%	1%	1%
HPP Goal Units	7	13	13

Appendix V—Town Owned Land

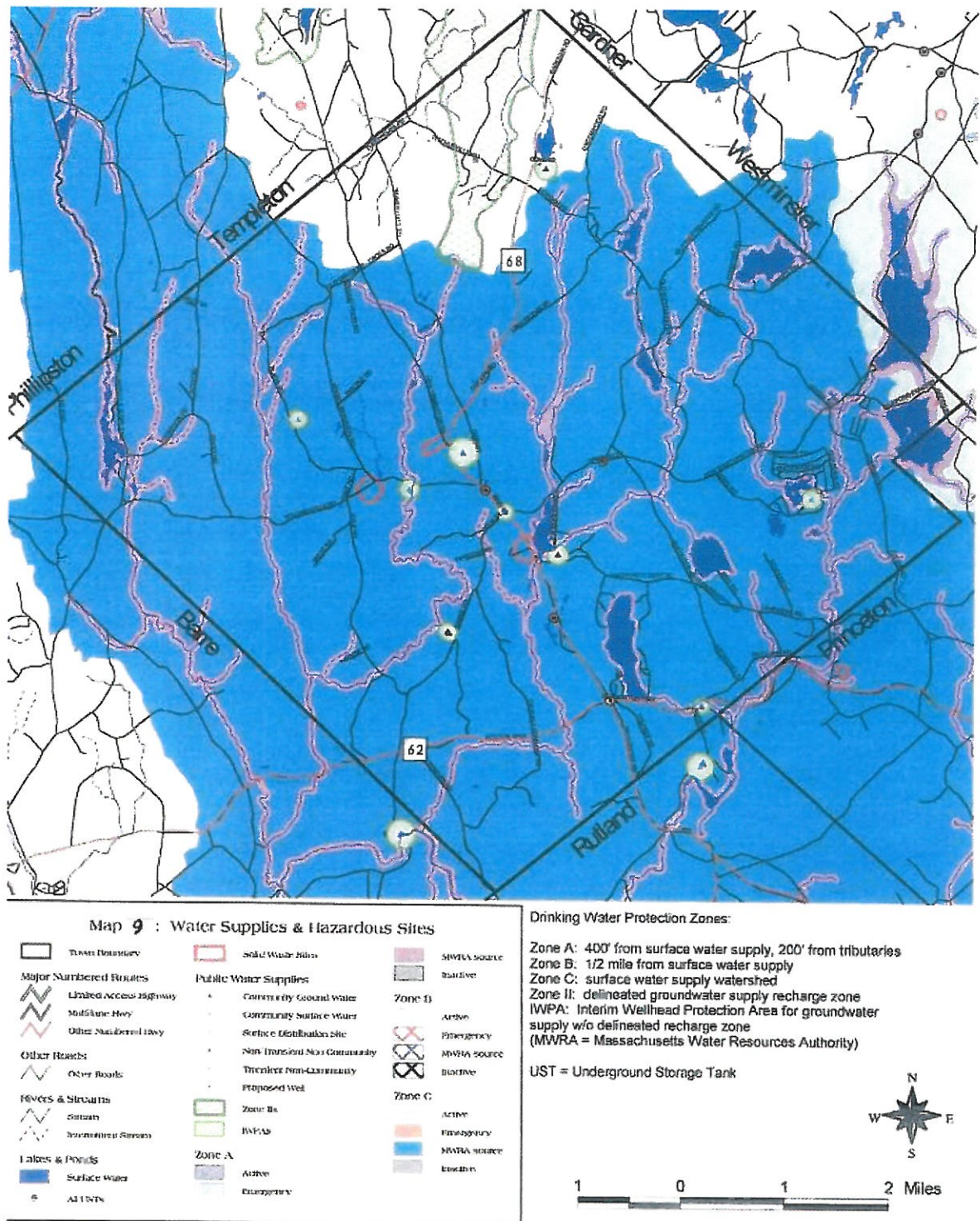
Hubbardston Assessors 2013 Data						
OWNER	ADDRESS	MAP	LOT	Code	UNIT	ACRES
TOWN OF HUBBARDSTON	0 MT JEFFERSON RD	2	53	972		202.03
TOWN OF HUBBARDSTON	0 OFF HALE RD	7	35	972		46.50
TOWN OF HUBBARDSTON	0 OFF WORCESTER RD	8 C	37	972		45.10
TOWN OF HUBBARDSTON	0 MT JEFFERSON RD	2	57	972		43.45
TOWN OF HUBBARDSTON	0 OFF NEW TEMPLETON RD	5	11	972		37.00
TOWN OF HUBBARDSTON	0 OFF OLD PRINCETON RD	11	29	972		28.80
TOWN OF HUBBARDSTON	0 NEW TEMPLETON RD	2	31	972		19.88
TOWN OF HUBBARDSTON	0 WORCESTER RD	8 C	33	972		18.10
TOWN OF HUBBARDSTON	0 MILE RD	1	47	972		17.00
TOWN OF HUBBARDSTON	0 NEW TEMPLETON RD	2	34	972		16.18
TOWN OF HUBBARDSTON	0 PITCHERVILLE RD	3	76	972		14.40
TOWN OF HUBBARDSTON	0 PITCHERVILLE RD	3	57	972		13.60
TOWN OF HUBBARDSTON	0 OFF PITCHERVILLE RD	3	75	972		13.50
TOWN OF HUBBARDSTON	0 OFF PARSONS RD	7	8	972		11.50
TOWN OF HUBBARDSTON	0 GARDNER RD	3	27 A	972		10.00
TOWN OF HUBBARDSTON	0 MALONE RD	5	13	972		8.50
TOWN OF HUBBARDSTON	0 OFF OLD PRINCETON RD	11	2	972		8.10
TOWN OF HUBBARDSTON	0 PARSONS RD	7	65	972		7.50
TOWN OF HUBBARDSTON	21 MALONE RD	2	58	972		7.30
TOWN OF HUBBARDSTON	8 ELM ST	8 A	11	972		7.30
TOWN OF HUBBARDSTON	0 PITCHERVILLE RD	3	73	972		7.20
TOWN OF HUBBARDSTON	0 WORCESTER RD	8 C	3	972		7.10
TOWN OF HUBBARDSTON	64 WORCESTER RD	8 C	36	972		6.43
TOWN OF HUBBARDSTON	20 GARDNER RD	5 C	123	972		6.42
TOWN OF HUBBARDSTON	0 GEORDIE LN	13	181	972		6.20
TOWN OF HUBBARDSTON	0 MALONE RD	2	58 A	972		6.17
TOWN OF HUBBARDSTON	0 DOGWOOD RD NORTH	13	179	972		5.50
TOWN OF HUBBARDSTON	0 GARDNER RD	5 C	29	972		5.10
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	33	972		5.09
TOWN OF HUBBARDSTON	0 PARSONS RD	7	166	972		5.00
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	147	972		5.00
TOWN OF HUBBARDSTON	0 MT JEFFERSON RD	2	204	972		5.00
TOWN OF HUBBARDSTON	0 OFF FLAGG RD	1	104	972		4.90
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	15	972		4.80
TOWN OF HUBBARDSTON	0 OFF HEALDVILLE RD	8	63 A	972		4.00
TOWN OF HUBBARDSTON	0 MALONE RD	5	7	972		4.00
TOWN OF HUBBARDSTON	0 WORCESTER RD	8 C	35	972		3.75
TOWN OF HUBBARDSTON	0 MALONE RD	5	12	972		3.50
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	219	972		3.37
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	218	972		3.36
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	217	972		3.35
TOWN OF HUBBARDSTON	0 RAGGED HILL RD	2	220	972		3.29
TOWN OF HUBBARDSTON	0 OFF CROSS RD	2	94	972		3.15
TOWN OF HUBBARDSTON	2 MAIN ST	8 A	115	972		2.80
TOWN OF HUBBARDSTON	0 BARRE RD	7	20	972		2.57
TOWN OF HUBBARDSTON	0 CHICOPEE DR	12 W	498	972		2.03
TOWN OF HUBBARDSTON	2 MAIN ST	8 A	116	972		1.80
TOWN OF HUBBARDSTON	0 EVERGREEN RD	8	109	972		1.70
TOWN OF HUBBARDSTON	0 LAUREL ST	13	180	972		1.40
TOWN OF HUBBARDSTON	0 HALE RD	4	36	972		1.10
TOWN OF HUBBARDSTON	0 MARE MEADOW LN	12	122	972		1.09
TOWN OF HUBBARDSTON	0 MALONE RD	5	7 A	972		1.00
TOWN OF HUBBARDSTON	0 AMBER LN	11 C	108	972		0.84
HUBBARDSTON HISTORICAL SOCIETY INC	4 BURNSHIRT RD	1	57	972		0.50
TOWN OF HUBBARDSTON	0 GARDNER RD	5	84	972		0.50
TOWN OF HUBBARDSTON	0 GARDNER RD	3	198	972		0.46
TOWN OF HUBBARDSTON	38 MAIN ST	5 C	83	972		0.40
TOWN OF HUBBARDSTON	0 CHICOPEE DR	12 W	590	972		0.38
TOWN OF HUBBARDSTON	0 PENOBSCOT AVE	12 W	426	972		0.38
TOWN OF HUBBARDSTON	0 BARRE RD	8 A	98	972		0.30
TOWN OF HUBBARDSTON	0 CHIPPEWAST	12 W	483	972		0.26
TOWN OF HUBBARDSTON	0 CHIPPEWAST	12 W	520	972		0.26
TOWN OF HUBBARDSTON	0 CHIPPEWAST	12 W	521	972		0.26
TOWN OF HUBBARDSTON	0 BARRE RD	8 A	99	972		0.20
TOWN OF HUBBARDSTON	0 OLD BOSTON TPK	10	13	972		0.20
TOWN OF HUBBARDSTON	0 LOWELL RD	5 C	79	972		0.20
TOWN OF HUBBARDSTON	0 MAIN ST	5 C	87	972		0.20
TOWN OF HUBBARDSTON	0 MILE RD	1	9	972		0.14
TOWN OF HUBBARDSTON	40 MAIN ST	5 C	85	972		0.14
HUBBARDSTON ELDERLY HOUSING	3 OLD PRINCETON RD CUTOFF	8 C	17	934		4.04

Appendix VI—Land Area Minimum Calculation



[illegible]

Appendix VIII—Drinking Water Protection Zones



MAP 2: Developable Lands and Partial Constraints
TOWN OF HUBBARDSTON
 June 18, 2001

Scale: 1" = 1 Mile

Compass Rose

Map showing the Town of Hubbardston, Massachusetts, with surrounding towns: Gardner, Templeton, Westminister, Phillipston, Barre, Princeton, and Rutland. The map displays various land use zones, including residential, commercial, and agricultural, as well as environmental constraints like wetlands and floodplains. A legend is provided for the zoning districts and overlay districts.

Legend

Municipal Zoning Districts

Zoning	Total Acreage	Percentage
Residential: Agricultural	26409.40	98.41
Town Center	69.50	0.26
Commercial	122.71	1.20
Light Industrial	33.39	0.13

Overlay Districts

- 100' Certified Vernal Pool Buffer
- 100' 100-Year Floodplain Buffer
- 100' Wetlands Protection District Buffer
- 100' Waterbody/Waterway Buffer

Metropolitan District Commission

Ware River Watershed boundary

Roads

- Local
- Interstate
- Arterial
- Collector
- Railroads
- Streams
- Lakes/Ponds
- Town Boundaries

Map 2: Developable Lands and Partial Constraints

Legend:

- Developable Lands
- Partial Constraints
- Wetlands
- Floodplains
- Waterbodies
- Waterways
- Waterbody/Waterway Buffer
- Wetlands Protection District Buffer
- 100' 100-Year Floodplain Buffer
- 100' Certified Vernal Pool Buffer
- Light Industrial
- Commercial
- Town Center
- Residential: Agricultural

Map 2: Developable Lands and Partial Constraints

Legend:

- Developable Lands
- Partial Constraints
- Wetlands
- Floodplains
- Waterbodies
- Waterways
- Waterbody/Waterway Buffer
- Wetlands Protection District Buffer
- 100' 100-Year Floodplain Buffer
- 100' Certified Vernal Pool Buffer
- Light Industrial
- Commercial
- Town Center
- Residential: Agricultural

Map 2: Developable Lands and Partial Constraints

Legend:

- Developable Lands
- Partial Constraints
- Wetlands
- Floodplains
- Waterbodies
- Waterways
- Waterbody/Waterway Buffer
- Wetlands Protection District Buffer
- 100' 100-Year Floodplain Buffer
- 100' Certified Vernal Pool Buffer
- Light Industrial
- Commercial
- Town Center
- Residential: Agricultural

[illegible]

Appendix XI—Comments by DHCD

From: DeMartino, Phillip (OCD) <phillip.demartino@state.ma.us>

Sent: Thursday, January 26, 2017 2:05 PM

To: Hubbardston Town Admin

Cc: Vin Ritchie

Subject: RE: Status of Hubbardston HPP

Hello all,

I have completed the review of the Housing Production Plan (HPP). Everything looks to be in order. The one thing I would add is a statement about the 1.5% on page 9-10. If you could add a statement that says something like "approval of this HPP does not mean that DHCD is in agreement with the calculations/ analysis of the general land area minimum" --- that would be appreciated.

The land area is a complicated calculation/ formula and the regs have a system for invoking it as a safe harbor so I am hesitant to keep it in the HPP without a disclaimer. We are also in the midst of developing new 1.5% Guidelines. You are welcome to keep it in the plan because it's part of Chapter 40B.

The Board of Selectman can move ahead with approval (it looks like The Planning board Approved it back in September 7, 2016).

Any questions, let me know.

Phil DeMartino, Technical Assistance Coordinator
Office of Sustainable Communities, DHCD
(617) 573-1357
Fax: (617) 573 1460
phillip.demartino@state.ma.us

Appendix XI—References and Acknowledgements

This report was assembled by Richard Heaton of H&H Associates from reports generated by:

- Central Massachusetts Regional Planning Commission (CMRPC) Hubbardston Social, Economic, and Housing Needs Assessment from 2014
- Karen Sunnarborg, Housing and Planning Consultant, Housing Production Plan of 2010
- Hubbardston Open Space and Recreation Plan for 2007 to 2012
- Ad Hoc Housing Committee:

Vincent Ritchie—Chairman

Andrew Baum

Tom Bratko

Peter Carmosino

Mark Dymek

MaryAnn Dipinto

Scott LeBlanc

Dennis O'Donnell

Catherine Ritchie

Tom Robinson

Janet Baczewski—Administrative Clerk

Anita Scheipers—Town Administrator, 2016

Raeanne Siegel—Town Administrator, 2017

HUBBARDSTON FY2020 CLASSIFICATIONS/GRADES

Non-Union	Call Fire	DPW	Fire	Police
A	A	A	A	A
MART Van Driver DPW Recycling Coordinator	No Positions Assigned	No Positions Assigned	No Positions Assigned	No Positions Assigned
B	B	B	B	B
Custodian Library Assistant	Firefighter	No Positions Assigned	No Positions Assigned	No Positions Assigned
C	C	C	C	C
Administrative Assistant - Board of Health Administrative Assistant - Building Administrative Assistant - Conservation Administrative Assistant - DPW Administrative Assistant - Planning Board Administrative Assistant - Police COA MART Supervisor	Fire Lieutenant	No Positions Assigned	No Positions Assigned	Reserve Patrol Officer
D	D	D	D	D
Administrative Assistant II - Assessing Administrative Assistant II - Finance Assistant Tax Collector Assistant Town Clerk	No Positions Assigned	Driver-Laborer	Firefighter EMT	No Positions Assigned
E	E	E	E	E
COA Director Executive Assistant	No Positions Assigned	Equipment Operator	Firefighter Paramedic	No Positions Assigned
F	F	F	F	F
No Positions Assigned	No Positions Assigned	Mechanic	No Positions Assigned	Police Detective Police Officer
G	G	G	G	G
No Positions Assigned	No Positions Assigned	No Positions Assigned	Fire Captain	No Positions Assigned
H	H	H	H	H
Building Inspector Library Director Town Clerk	No Positions Assigned	No Positions Assigned	No Positions Assigned	Police Sergeant
J	J	J	J	J
Town Accountant Treasurer/Collector	No Positions Assigned	No Positions Assigned	Deputy Fire Chief	No Positions Assigned
L	L	L	L	L
Director of Public Works	No Positions Assigned	No Positions Assigned	No Positions Assigned	No Positions Assigned
M	M	M	M	M
Fire Chief Police Chief	No Positions Assigned	No Positions Assigned	No Positions Assigned	No Positions Assigned
N	N	N	N	N
Town Administrator	No Positions Assigned	No Positions Assigned	No Positions Assigned	No Positions Assigned

\$13.50 Starting Hourly Wage
52.20 Work Weeks Per Year

40.0 Hours Per Week
2.0 Percent between Steps

HUBBARDSTON PROPOSED FY2020 PAY PLAN -NON UNION

% Between Grades	Grade	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12	Step 13	Step 14
9	A	13.50	13.77	14.05	14.33	14.62	14.91	15.21	15.51	15.82	16.14	16.46	16.79	17.13	17.47
		540.00	550.80	562.00	573.20	584.80	596.40	608.40	620.40	632.80	645.60	658.40	671.60	685.20	698.80
		28,188.00	28,751.76	29,336.40	29,921.04	30,526.56	31,132.08	31,758.48	32,384.88	33,032.16	33,700.32	34,368.48	35,057.52	35,767.44	36,477.36
12	B	14.72	15.01	15.31	15.62	15.93	16.25	16.58	16.91	17.25	17.60	17.95	18.31	18.68	19.05
		588.80	600.40	612.40	624.80	637.20	650.00	663.20	676.40	690.00	704.00	718.00	732.40	747.20	762.00
		30,735.36	31,340.88	31,967.28	32,614.56	33,261.84	33,930.00	34,619.04	35,308.08	36,018.00	36,748.80	37,479.60	38,231.28	39,003.84	39,776.40
9	C	16.49	16.82	17.16	17.50	17.85	18.21	18.57	18.94	19.32	19.71	20.10	20.50	20.91	21.33
		659.60	672.80	686.40	700.00	714.00	728.40	742.80	757.60	772.80	788.40	804.00	820.00	836.40	853.20
		34,431.12	35,120.16	35,830.08	36,540.00	37,270.80	38,022.48	38,774.16	39,546.72	40,340.16	41,154.48	41,968.80	42,804.00	43,660.08	44,537.04
9	D	17.97	18.33	18.70	19.07	19.45	19.84	20.24	20.64	21.05	21.47	21.90	22.34	22.79	23.25
		718.80	733.20	748.00	762.80	778.00	793.60	809.60	825.60	842.00	858.80	876.00	893.60	911.60	930.00
		37,521.36	38,273.04	39,045.60	39,818.16	40,611.60	41,425.92	42,261.12	43,096.32	43,952.40	44,829.36	45,727.20	46,645.92	47,585.52	48,546.00
9	E	19.59	19.98	20.38	20.79	21.21	21.63	22.06	22.50	22.95	23.41	23.88	24.36	24.85	25.35
		783.60	799.20	815.20	831.60	848.40	865.20	882.40	900.00	918.00	936.40	955.20	974.40	994.00	1,014.00
		40,903.92	41,718.24	42,553.44	43,409.52	44,286.48	45,163.44	46,061.28	46,980.00	47,919.60	48,880.08	49,861.44	50,863.68	51,886.80	52,930.80
9	F	21.35	21.78	22.22	22.66	23.11	23.57	24.04	24.52	25.01	25.51	26.02	26.54	27.07	27.61
		854.00	871.20	888.80	906.40	924.40	942.80	961.60	980.80	1,000.40	1,020.40	1,040.80	1,061.60	1,082.80	1,104.40
		44,578.80	45,476.64	46,395.36	47,314.08	48,253.68	49,214.16	50,195.52	51,197.76	52,220.88	53,264.88	54,329.76	55,415.52	56,522.16	57,649.68
9	G	23.27	23.74	24.21	24.69	25.18	25.68	26.19	26.71	27.24	27.78	28.34	28.91	29.49	30.08
		930.80	949.60	968.40	987.60	1,007.20	1,027.20	1,047.60	1,068.40	1,089.60	1,111.20	1,133.60	1,156.40	1,179.60	1,203.20
		48,587.76	49,569.12	50,550.48	51,552.72	52,575.84	53,619.84	54,684.72	55,770.48	56,877.12	58,004.64	59,173.92	60,364.08	61,575.12	62,807.04
9	H	25.36	25.87	26.39	26.92	27.46	28.01	28.57	29.14	29.72	30.31	30.92	31.54	32.17	32.81
		1,014.40	1,034.80	1,055.60	1,076.80	1,098.40	1,120.40	1,142.80	1,165.60	1,188.80	1,212.40	1,236.80	1,261.60	1,286.80	1,312.40
		52,951.68	54,016.56	55,102.32	56,208.96	57,336.48	58,484.88	59,654.16	60,844.32	62,055.36	63,287.28	64,560.96	65,855.52	67,170.96	68,507.28
9	I	27.64	28.19	28.75	29.33	29.92	30.52	31.13	31.75	32.39	33.04	33.70	34.37	35.06	35.76
		1,105.60	1,127.60	1,150.00	1,173.20	1,196.80	1,220.80	1,245.20	1,270.00	1,295.60	1,321.60	1,348.00	1,374.80	1,402.40	1,430.40
		57,712.32	58,860.72	60,030.00	61,241.04	62,472.96	63,725.76	64,999.44	66,294.00	67,630.32	68,987.52	70,365.60	71,764.56	73,205.28	74,666.88

HUBBARDSTON PROPOSED FY2020 PAY PLAN -NON UNION

% Between Grades	Grade	Step 1	Step 2	Step 3	Step 4	Step 5	Step 6	Step 7	Step 8	Step 9	Step 10	Step 11	Step 12	Step 13	Step 14
9	J	30.13	30.73	31.34	31.97	32.61	33.26	33.93	34.61	35.30	36.01	36.73	37.46	38.21	38.97
		1,205.20	1,229.20	1,253.60	1,278.80	1,304.40	1,330.40	1,357.20	1,384.40	1,412.00	1,440.40	1,469.20	1,498.40	1,528.40	1,558.80
9		62,911.44	64,164.24	65,437.92	66,753.36	68,089.68	69,446.88	70,845.84	72,265.68	73,706.40	75,188.88	76,692.24	78,216.48	79,782.48	81,369.36
	K	32.84	33.50	34.17	34.85	35.55	36.26	36.99	37.73	38.48	39.25	40.04	40.84	41.66	42.49
		1,313.60	1,340.00	1,366.80	1,394.00	1,422.00	1,450.40	1,479.60	1,509.20	1,539.20	1,570.00	1,601.60	1,633.60	1,666.40	1,699.60
9		68,569.92	69,948.00	71,346.96	72,766.80	74,228.40	75,710.88	77,235.12	78,780.24	80,346.24	81,954.00	83,603.52	85,273.92	86,986.08	88,719.12
	L	35.80	36.52	37.25	38.00	38.76	39.54	40.33	41.14	41.96	42.80	43.66	44.53	45.42	46.33
		1,432.00	1,460.80	1,490.00	1,520.00	1,550.40	1,581.60	1,613.20	1,645.60	1,678.40	1,712.00	1,746.40	1,781.20	1,816.80	1,853.20
9		74,750.40	76,253.76	77,778.00	79,344.00	80,930.88	82,559.52	84,209.04	85,900.32	87,612.48	89,366.40	91,162.08	92,978.64	94,836.96	96,737.04
	M	39.02	39.80	40.60	41.41	42.24	43.08	43.94	44.82	45.72	46.63	47.56	48.51	49.48	50.47
		1,560.80	1,592.00	1,624.00	1,656.40	1,689.60	1,723.20	1,757.60	1,792.80	1,828.80	1,865.20	1,902.40	1,940.40	1,979.20	2,018.80
15		81,473.76	83,102.40	84,772.80	86,464.08	88,197.12	89,951.04	91,746.72	93,584.16	95,463.36	97,363.44	99,305.28	101,288.88	103,314.24	105,381.36
	N	44.87	45.77	46.69	47.62	48.57	49.54	50.53	51.54	52.57	53.62	54.69	55.78	56.90	58.04
		1,794.80	1,830.80	1,867.60	1,904.80	1,942.80	1,981.60	2,021.20	2,061.60	2,102.80	2,144.80	2,187.60	2,231.20	2,276.00	2,321.60
		93,688.56	95,567.76	97,488.72	99,430.56	101,414.16	103,439.52	105,506.64	107,615.52	109,766.16	111,958.56	114,192.72	116,468.64	118,807.20	121,187.52

Town of Hubbardston



Town Administrator's Proposed FY20 Operating and Capital Budget

Ryan M. McLane
Town Administrator

February 19, 2019



Table of Contents

Introduction	3
Community Profile	5
Budget Planning Calendar	6
Budget Goals	7
Organizational Chart	8
TA Budget Message	9
Executive Summaries	13
Employee Totals by Department	16
Department Summaries	17
Capital Budget	20
Debt Service	22
Town Reserves	23
Updated Financial Forecast	24
What's Next	25
Budget Summary Chart	26
Line-Item Budget	27



Introduction

A Resident's Guide to the Budget

Welcome! If you are reading this, it means you are interested in better understanding one of the most important documents produced by your community. The Town Administrator's Recommended FY20 Budget & Capital Plan is much more than just a collection of numbers; it's a reflection of Hubbardston values, priorities, and goals. The budget document serves as a policy document, a financial guide, and a communications device to its residents. To this end, it is designed to be as user friendly as possible. This section of the Town Administrator's Recommended FY20 Budget & Capital Plan was created to help orient readers by providing a brief overview of the budget process, as well as an explanation of the organization of the budget document itself. We hope you find the introductory guide a useful tool as you better acquaint yourself with the latest financial and planning information for the Town of Hubbardston.

The Budget Process

The Town of Hubbardston is governed by the Town Charter by which a popularly elected, five-member Board of Selectmen appoints a professional administrator to manage the daily operation of the Town. The Town's legislative body is an Open Town Meeting in which any registered voter may partake and vote.

In accordance with the Town Charter and bylaws, the Town Administrator must annually submit a budget to the Board of Selectmen 90 days prior to the Annual Town Meeting. The Board of Selectmen and Finance Committee review the annual budget February through April and submit their recommendations. Town Meeting then votes to adopt both the operating and capital budgets.

It is important to note that the financial and budgetary information presented in the annual budget are projections and are subject to change prior to Town Meeting.

For prior year budgets and plans, plus additional financial documents please visit <https://www.hubbardstonma.us/town-administrator/pages/budget-and-finance>.

For more detailed information on the budget calendar, please refer to the budget calendar, goals and executive summary sections of this document.

How to Read This Budget

The introductory sections of this budget document orient the reader by describing the community, outlining the Hubbardston budget process, stating the FY20 budget goals and reviewing the town's organizational structure. The introductory sections conclude with a budget message from the Town Administrator summarizing key points of emphasis for the overall budget proposal.

Next this document describes the budget at the executive level, breaking expenditures into town, school, indirect and debt costs. In order to better describe the budget's impact on town functions, employee total changes are detailed, followed by a specific look at department-level recommendations. Although the budget is shown entirely in the final pages of this document at the "line-item level," these summaries allow leaders to see detailed explanations of proposed changes.

Individual aspects of the proposed budget follow the department-level analysis. The Capital Budget describes proposed vehicle and infrastructure improvements. The "Debt Service" section details current borrowing levels contained in the proposed budget. And the "Town Reserves" section outlines the current state of Hubbardston's rainy-day funds and compares them to policy.

The final budget sections describe the future. Today's decisions have impacts on later budgets. The town maintains a financial forecast in order to help predicate these potential changes. The updated financial forecast puts the proposed FY20 budget in future context. The "What's Next" section briefly discusses the remainder of the FY20 budget process. While this budget document serves as the foundation for the FY20 budget, many decisions remain to include recommendations by the Board of Selectmen and the Finance Committee. This "What's Next" section offers suggestions on how to address the coming changes to present a balanced budget to Town Meeting voters.



Community Profile

The Town of Hubbardston is located geographically approximately 17 miles to the northwest of Worcester, in Worcester County. Hubbardston is bounded on the northwest by Phillipston and Templeton; on the northeast by Gardner and Westminster; on the southeast by Princeton and Rutland; and on the southwest by Barre.

The town is home to more than 4,400 residents living in rural community of 42 square miles, 2.19% of which is water. The Town was incorporated in 1767.

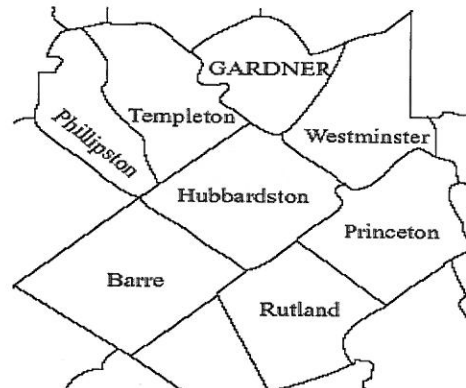
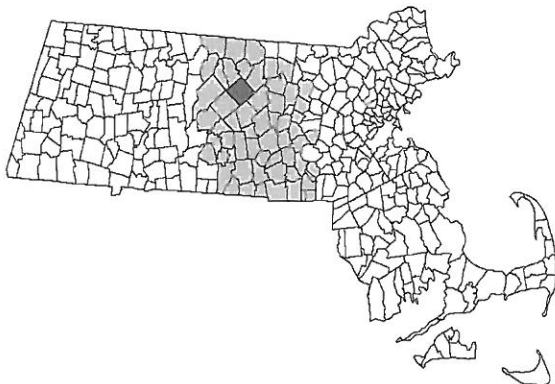
Hubbardston's quality of life is enhanced by its open space, recreational opportunities, special events and commitment to volunteerism. Although its history is very important to the town, so too is its commitment to responsible growth.

Hubbardston provides a broad range of general government services including police and fire protection; public works; parks and recreation; a senior center; and a library. Hubbardston is a part of the Quabbin Regional School District comprised of Hubbardston, Barre, Hardwick, New Braintree and Oakham.

For more information on Hubbardston, visit the [official town Web site](#).

Incorporated:	1767
Land Area:	42 square miles
Elevation:	993 feet
Public Roads:	85.96
Population:	4464
County:	Worcester
Government:	Open Town Meeting
FY19 Tax Rate:	15.22
Median Home Value:	\$257,471
Average Tax Bill:	\$,3919

Town Charter and Bylaws





FY20 Budget Planning Calendar

<u>Date</u>	<u>Required Action Item</u>
September 1	Departments/Boards submit all capital items
October 1	Budget Planning Calendar Finalized
October 15	Select Board/Finance Committee establish FY20 Goals
November 13	Town Administrator estimates FY20 revenue
November 26	Budget requests sent to Departments/Committees
December 10	Presentation of 5-Year Financial Forecast
December 20	Departments submit FY20 budget requests
January 21	5-Year Capital Plan presented to Select Board
February 04	Selectmen Open the Warrant/ Set Article Deadline
February 19	Budget forwarded to the Finance Committee
February 19	Town Administrator Presents Recommended Budget
-----Finance Committee Departments Meetings-----	
April 1	Warrant Closed (Article Deadline)
April 16	Public Budget Hearing
April 29	Budget/Warrant Vote
May 13	Warrant Finalized / Selectmen Sign Warrant
June 4	Town Meeting
June 11	Town Election



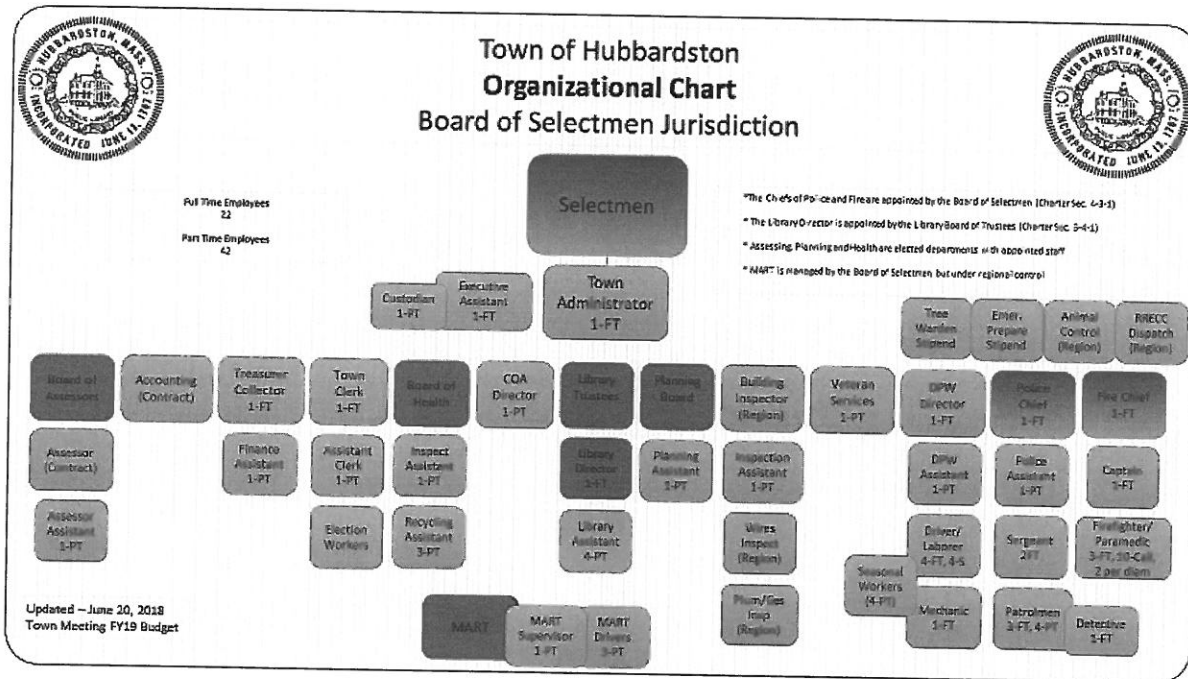
Budget Goals

The Board of Selectmen and Finance Committee agreed on several goals in the fall of 2018 to shape the FY20 budget process. Those stated goals were as follows:

- 1.) Address the structural deficit in the operating budget as shown in the town's five-year financial forecast by controlling costs and looking for efficiencies in regionalization and contractual relationships. Any line item not level-funded must include an explanation from the department or the Town Administrator.
- 2.) Implement adherence to published financial management policies over the next five years. These policies include:
 - a. Stabilization maintain 5% of operating budget
 - b. Capital Stabilization maintain 1% of operating budget
 - c. Free Cash generate 5% of operating budget annually
 - d. Revenue projections 90% of actual
 - e. Capital Expenditure 6% of operating budget annually
 - f. Operating Debt 3% of operating budget annually
 - g. Annual Town Reserves 10% of operating budget



Organizational Chart





Town Administrator

7 MAIN STREET, Unit #3
HUBBARDSTON, MASSACHUSETTS 01452
(978) 928-1400 x 201 FAX (978) 928-3392

To: The Hubbardston Board of Selectmen and Finance Committee

From: Ryan M. McLane
Town Administrator

Date: February 19, 2019

Subject: FY20 Town Administrator's Budget Message

I hereby submit the FY20 Town Administrator's Proposed Operating and Capital Budget. These recommendations are balanced, starting a five-year campaign to align our budgetary values with best-practice financial policies approved in FY19. Although this budget attacks the operating budget's structural deficit by controlling growth, it also makes sound investments to improve resident services. I am proposing a budget that:

- Meets the Board of Selectmen and Finance Committee's goals of only proposing necessary or impactful budget increases
- Increases the ability of our public safety and public works departments to provide high-quality services to the residents of Hubbardston
- Meets several financial policy goals to include reducing the reliance on one-time revenues, meeting financial indicators for budget stability and continuing to invest more than 6% in capital assets

Despite these successes, the operating budget's structural deficit necessitates difficult conversations. This proposed budget does not have the type of resilience that can overcome large unexpected increases in fixed-cost services like health insurance, educational spending and large debt purchases. We will continue to fight year-to-year to improve the town's financial resilience; however, there are scenarios and emergencies that would require either additional revenues or massive service cuts.

Overall, this budget includes a 2.7% operating budget increase with \$263,000 spent to fund important capital expenditures. This proposal uses less free cash for operating expenses than the FY19 budget and represents a full percentage point reduction in expenditures. It also relies heavily

on financial policies established in FY19. These policies will allow town officials to better plan and fund large initiatives and projects that ready Hubbardston for the next decade.

Revenue Discussion

This proposed budget relies on five sources of revenue. Each revenue source is explained below:

Tax Levy – The primary driver of this proposed budget is property taxes. This budget recommends taxing to the capacity allowed by proposition 2½. The capital outlay passed in the FY19 budget for the library roof will not be included in the FY20 levy meaning a small tax break for residents when comparing the years.

New Growth – The new growth number in this budget is a direct recommendation from our assessing team. It includes 40,000 in property tax growth and half of the tax agreement signed between the town and Borrego Solar for the new solar field on Williamsville Road. The other half of the tax agreement growth may come on line by the time the FY20 tax rate is certified.

Local Receipts – Policies adopted in FY19 recommend projecting local receipts at 90 percent of the prior year's actual. This policy goal enables budget flexibility and protects against shortfalls. The FY19 budget projected local receipts at 100 percent of prior-year actuals. This budget recommends projecting revenues at 97% of FY18 actuals, moving our revenue projection closer to policy. The goal is to estimate local receipts at 90% in 5 years.

State Aid – This projection comes from the Governor's budget. Hubbardston typically gets a small increase in state aid in the adopted budget, but this cannot be guaranteed. This year's state aid increase is comparable to last year's at slightly more than 4.5%.

Free Cash – This budget includes free cash usage for two purposes. First, free cash helps fund the operating budget. Although this is against best practice and town policy, recent reliance on free cash means we must slowly wean usage in order to not strangle the operating budget. In FY19, the budget included \$133k in free cash for the operating budget. This recommendation includes \$100k with the goal of not using free cash for operating expenses within two years. The second purpose for free cash in this budget is to fund capital expenses.

Any revenue discussion must conclude with a recommendation for additional revenues realized before Annual Town Meeting. If revenue projections increase or expenditures decrease before Annual Town Meeting, it is my recommendation that we first reduce free cash for operating expenses, then continue to move our local receipt projections closer to policy.

Expenditure Discussions

The following are important expenditure highlights:

- Obligations to our students are a top priority in this budget. This recommendation includes a researched estimate for Monty Tech and a more than 4% increase in the QRSD assessment. We will not know the QRSD assessment until April. If the projections come in higher than 4%, large changes will be needed to accommodate the increase.
- Significant savings were realized in our retirement, dispatch, veteran services and health insurance line items. While these reductions allow us to focus assets elsewhere and control long-term-budget growth, they should not be expected year after year.
- Careful attention was paid in this budget to fund the town's most important operating budget expense – its employees. Every union contract is settled through the start of FY22 and this budget continues to encourage wage parity for non-union staff.
- This budget addresses important issues for our public safety departments. First, increases for the police department attack a structural deficit in the budget that causes continued overruns of the appropriated wages line item. Second, the budget recommends enough appropriation to make fire service increases permanent. And finally, this budget increases the public works budget in order to improve road maintenance capacity.
- This budget continues to engage a regional economic development coordinator. A state grant received by the town of Hardwick funded the first year of this position and enough of the grant remains to fund most of a second year. For a small investment of \$3,000, Hubbardston can continue this position for more robust economic development planning.

Capital Improvement Plan

This proposed budget funds the first year of the new FY20-24 Capital Plan. The first year of the plan will be the most expensive, addressing needs neglected in past years due to necessary, but expensive investments in infrastructure. By fully funding the FY20 Capital Plan, the town can clear room in the coming years to continue to work on road and infrastructure improvements demanded by residents and vital to economic development.

Here are the items funded in the FY20 proposal:

- 1.) DPW Plow Truck
- 2.) Town computer replacements
- 3.) Library annex sky light and roof repairs
- 4.) Pavement roller and trailer
- 5.) New police cruiser
- 6.) New handguns for police personnel
- 7.) School capital to include new cafeteria equipment and a water pump replacement

I look forward to working with the newly revamped Capital Improvement Planning Committee (CIPC) to start address long-term capital planning that will allow for an automatic renewal of town assets using the minimum amount of resources.

Conclusions

This budget proposal is both balanced and impactful. It takes full advantage of continued revenue increases from the state, cost-reduction measures from town staff and regionalization efforts to control growth and invest in services. However, it must be noted that the budget still contains a structural deficit that should temper optimism.

It is important to recognize that creating a budget proposal is a team process. I would like to thank the staff for their dedicated service, helping to implement best practices and increase the information available to town leaders and residents. Our robust finance team worked diligently to improve efficiency and transparency. A special thanks is warranted to Sandy, Diane, Joyce, Laurie and Laurie. Similarly, Hubbardston management would not be possible without the help of residents volunteering their time. I would like to thank the Board of Selectmen and the Finance Committee for their direction and careful attention.

Please do not hesitate to contact me if you have any questions. I look forward to helping provide a final recommendation to Town Meeting and working on the many initiatives that will make FY20 a great year for the Town of Hubbardston.

A handwritten signature in black ink, appearing to read "Rm. McLane". The signature is stylized with a large "R" and a long, sweeping underline.

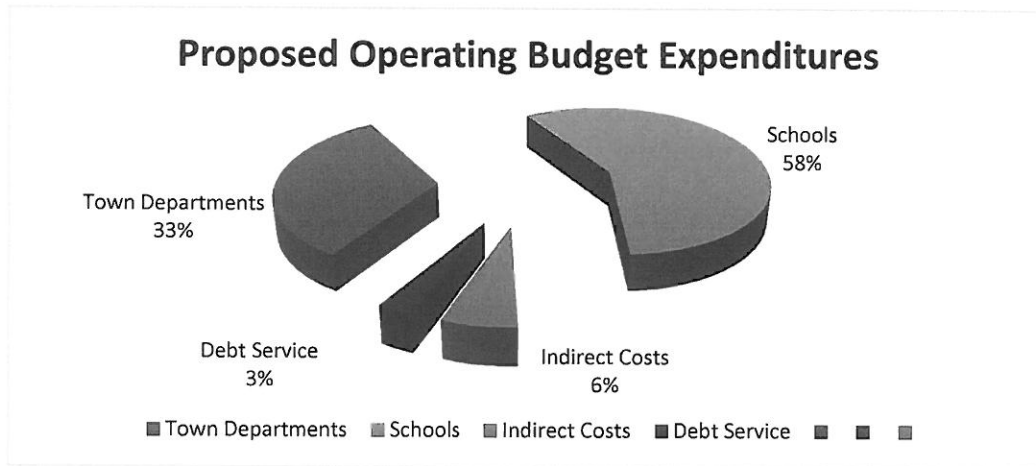
Ryan M. McLane
Town Administrator



Executive Budget Summary

Overall Budget

The FY20 Town Administrator's Recommended Budget totals \$9,268,922. This budget is balanced and meets the stated goals of the Board of Selectmen and Finance Committee. It represents a 2.71% increase over the \$9,023,955 appropriated in FY19. An additional sum of \$263,000 is recommended in this budget for capital and \$20,000 for warrant article appropriations. Overall, the budget is a growth-controlling proposal that meets town policy guidelines and increases services to residents.



Town Departments

The FY20 Town Administrator's Proposed Budget for town departments totals \$3,037,357. This is an 1.97 % increase over FY19. This total includes addressing the structural deficit in the police department budget, fully funding the additional paramedic/firefighter and funding the FY20-22 Fire Union contract. The proposal also recommends additional road maintenance funds and annual increases for all employees to include moving most non-union employees to the FY20 Wage Plan.

School Departments

The FY20 Town Administrator's Proposed Budget totals \$5,363,178 for Hubbardston schools. This includes QRSD debt. This is a 3.33 percent increase over the FY19 approved budget. While confidence is high for the Montachusett Regional Vocational Technical High School request, the Quabbin Regional School District is yet to approve their budget. The placeholder in this budget represents a more than 4% increase over the FY19 appropriation.

Insurance and Indirect Costs

The sum of \$589,316 is recommended for insurance and indirect costs in FY20. This recommendation is a .04% increase over the FY19 approved budget. Indirect costs, mainly retirement, health insurance and town insurance remained relatively level-funded, affording the opportunity to decrease overall budget growth.

Debt Service

The sum of \$279,071 is recommended for debt service in FY20. This is 2.86% increase over last year's spending and represents 3.01% of the total operating budget. This meets the financial policy of 2-5% annual debt service expenditure. The total debt service for the town represents 3.35% of the operating budget when school debt is included.

Capital Improvement Program

Capital expenditures recommended in FY20 total \$573,181. This includes \$310,181 in existing school and town debt and \$263,000 in pay-as-you-go expenditures. This year's recommendation aligns with the newly completed FY20-24 Capital Improvement Plan and is a consensus of department requests by priority. A summary of proposed capital expenditures can be found in the capital budget section of this document.

Warrant Articles

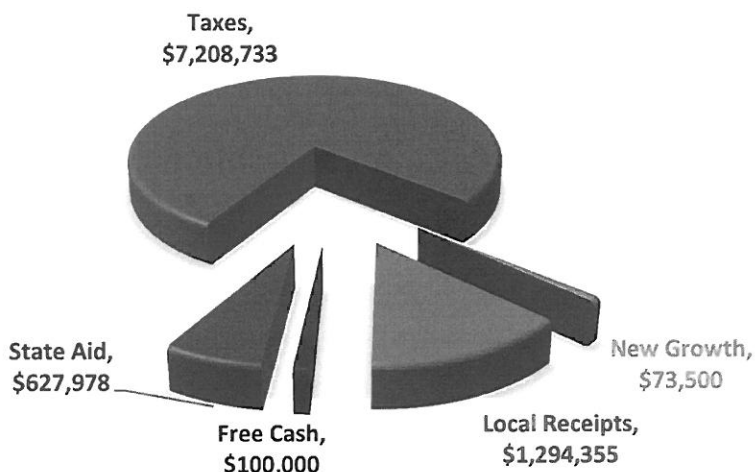
At the time of this budget's publishing, only two known warrant articles exist excluding the FY20 Capital Plan. These articles include an annual request of \$15,000 for the Senior Tax Work-Off Program and \$6,000 for cemetery maintenance equipment. The total expected appropriation for FY20 warrant articles is \$21,000.

Revenues

This proposed budget projects \$9,269,566 in available FY20 revenue. This figure does not include potential Community Preservation Act monies or other revenues besides property taxes, new growth, state aid, local receipts and free cash. The projection includes \$7,208,733 in property taxes, \$73,500 in new growth, \$1,294,355 in local receipts and \$627,978 in state aid. The recommended budget also includes a total of \$100,000 in free cash to supplement the operating budget.

Taxes	\$ 7,208,733
New Growth	\$ 73,500
Local Receipts	\$ 1,294,355
Free Cash	\$ 100,000
State Aid	\$ 627,978

FY20 PROJECTED REVENUE



Property Taxes – There is an increase of 2.5% proposed for the property tax levy. This proposal recommends limiting excess levy capacity, but does not recommend exceeding the allowed 2.5% increase in property taxes.

State Aid – The Governor’s FY20 budget includes \$627,978 in state aid for Hubbardston. This is a 4.79% increase from FY19. Traditionally, the house and senate make small increases in state aid before the final state budget is passed; however, this budget does not include a recommendation to exceed the Governor’s projected total.

Local Revenues – Local revenues are projected at \$1,294,355 for FY20. This is a 3% decrease from FY18 actuals and a 2.79% decrease from FY19 projections. While local revenues met expectation in FY18, the town’s financial policies recommended projecting revenue at 90 percent of the prior year’s actuals. This budget recommends projecting local revenues at 97% to move closer to the recommended policy while still allowing for minimal services growth. The overall goal is to continue to reduce local receipt projections in order to create a stable and conservative annual budget.

Free Cash – The Department of Revenue certified Hubbardston’s Free Cash at \$401,503 at the close of 2019. This budget recommends using \$100,000 in free cash to fund operating expenses. Although best practice and town policy recommend not using free cash for operating expenses, this recommendation is a decrease of 25% of free cash reliance, moving the budget closer to financial policy while maintaining minimal services growth. The overall goal is to remove the town’s reliance on free cash for the operating budget by FY22.

State Aid Total	Revenue Lookback			Local Receipts	
	% Increase				
\$ 627,988	4.79%	FY20	\$ 1,294,354	-2.11%	
\$ 599,275	4.27%	FY19	\$ 1,322,200	-0.91%	
\$ 574,717	10.15%	FY18	\$ 1,334,386	-4.93%	
\$ 521,751	3.59%	FY17	\$ 1,403,590	2.09%	
\$ 503,667	5.92%	FY16	\$ 1,374,900	0.56%	
\$ 475,497	6.31%	FY15	\$ 1,367,204	4.40%	
\$ 447,284		FY14	\$ 1,309,592		



Employees by Department

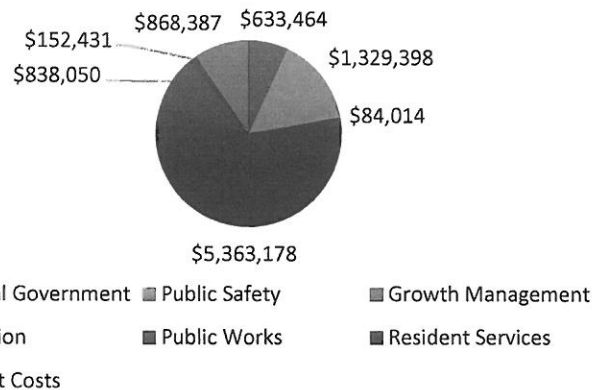
An important consideration in any budget is employee count totals. Understanding how a proposed budget impacts employees levels is important considering government is a “people business.” The following chart represents full-time employee equivalents (FTE) by department and recommended changes to those totals. It is important to include this information in the budget in order to inform decision makers and residents about the budget’s largest driver of long-term cost growth.

Department	FY19 FTEs	Employees	FY20 Change	Explanation
Executive	2.49	3	-0.06	Reduction in custodial hours (2)
Assessors	0.46	1	-0.06	Reduction in public hours (2)
Accounting	0.00	0	0.00	Contract
Treasurer	1.54	2	0.00	
Town Clerk	0.94	2	0.00	
Health/ConCom	0.46	1	-0.03	Reduction in hours (1)
COA	0.51	1	-0.11	Reduction in hours (4)
Library	1.03	5	0.00	
Planning	0.43	1	-0.03	Reduction in hours (1)
Building	0.54	1	-0.03	Reduction in hours (1)
Veterans	0.11	1	0.00	
DPW	7.40	7	-0.03	Reduction in admin hours (1)
Police	8.54	8	-0.03	Reduction in admin hours (1)
Fire	5.71	5	0.00	
	30.17	38	-0.37	
				** This chart assumes a 35 hour work week. The Town Administrator, police, fire and DPW employees all work 40 hours.
Stipend, Seasonal, Reserve and On-Call				
Police		Reserve (4)		
Fire		On Call (10)		
Fire		Per Diem (2)		
Senior workoff		10		
Seasonal DPW		4		
Election worker		11		3-4 called in for Presidential Elections
Tree Warden		1		
Emergency Management		1		
MART		4		Supervisor, three drivers
Assessor		Contract		
Animal Control		Contract		
Inspectors		Contract		
Accounting		Contract		
Dispatch		Regional		
Recycling		3		Supervisor, two employees



Department Summaries

FY20 Budget Expenditures



General Government

This budget recommends a 0.91% increase in general government expenses. Budget highlights include seven pay-plan changes for administrative staff, increased information technology expenses for necessary software upgrades and a net reduction in contractual expenses due to savings with accounting, copying and telephone contracts. Controls on the town legal budget also resulted in the first level-funding of the legal services line item in several years.

General Government	FY17	FY18	FY19	FY20	% Increase
Executive	\$ 116,036	\$ 117,677	\$ 131,425	\$ 138,096	5.08%
Town Clerk	\$ 54,306	\$ 49,994	\$ 59,480	\$ 55,212	-7.18%
Accounting	\$ 50,700	\$ 59,700	\$ 61,200	\$ 57,500	-6.05%
Assessors	\$ 85,248	\$ 87,444	\$ 83,740	\$ 84,283	0.65%
Treasurer/Collector	\$ 91,490	\$ 83,367	\$ 96,770	\$ 101,571	4.96%
Legal Services	\$ 35,000	\$ 40,000	\$ 40,000	\$ 40,000	0.00%
Conservation	\$ 1,172	\$ 1,172	\$ 1,172	\$ 1,172	0.00%
Operational Support	\$ 106,500	\$ 111,500	\$ 117,000	\$ 118,655	1.41%
Other	\$ 36,975	\$ 36,975	\$ 36,975	\$ 36,975	0.00%
Total	\$ 577,427	\$ 587,829	\$ 627,762	\$ 633,464	0.91%

Public Safety

This budget recommends a 4.28% increase in public safety expenses. Budget highlights include attacking the structural deficit in the police department budget, fully funding the additional firefighter/paramedic (partially appropriated in FY19) and fully funding the first year of a new three year collective bargaining agreement with the firefighter union. Finally, this budget is assisted by a

reduction in assessment from the Rutland Regional Dispatch Control Center resulting from the regional expansion to include Warren.

Public Safety	FY17	FY18	FY19	FY20	% Increase
Police	\$ 531,351	\$ 583,395	\$ 609,140	\$ 647,121	6.24%
Fire	NA	NA	\$ 514,700	\$ 537,078	4.35%
Other	\$ 146,683	\$ 150,287	\$ 150,990	\$ 145,198	-3.84%
Total	NA	NA	\$ 1,274,830	\$ 1,329,398	4.28%

Growth Management

This budget recommends a 0.52% increase in growth management expenses. Budget highlights includes fully funding the regional building inspection agreement with Gardner, moving three non-union employees onto the FY20 pay plan and adding a stipend to continue funding the regional economic development coordinator position.

Growth Management	FY17	FY18	FY19	FY20	% Increase
Building	\$ 32,650	\$ 33,205	\$ 29,958	\$ 25,135	-16.10%
Planning	\$ 2,424	\$ 2,520	\$ 15,500	\$ 19,038	22.83%
Inspectional Services	\$ 23,327	\$ 23,794	\$ 26,575	\$ 28,298	6.48%
Health	\$ 11,543	\$ 11,543	\$ 11,543	\$ 11,543	0.00%
Total	\$ 69,944	\$ 71,062	\$ 83,576	\$ 84,014	0.52%

Education

This budget recommends a 3.44% increase in education expenses. Budget highlights include funding the Quabbin Regional School District with a 4% assessment increase based off a four-year projection and level-funding the Monty Tech assessment based on current enrollement. This budget, representing more than 59% of the total operating budget, will not become final until April and contains some risk of being underfunded.

Education	FY17	FY18	FY19	FY20	% Increase
QRSD	\$ 4,276,871	\$ 4,323,137	\$ 4,493,506	\$ 4,673,246	4.00%
Monty Tech	\$ 610,127	\$ 665,844	\$ 658,822	\$ 658,822	0.00%
Debt	\$ 35,783	\$ 31,896	\$ 32,515	\$ 31,110	-4.32%
Total	\$ 4,944,759	\$ 5,020,877	\$ 5,184,843	\$ 5,363,178	3.44%

Public Works and Cemeteries

This budget recommends a 3.11% increase in department expenses. Budget highlights include funding additional culvert and road maintenance line items to help the DPW make smaller repairs before Chapter 90, state or federal monies become available. Additionally, the budget includes moving one employee onto the town pay plan and COLA adjustments for other DPW employees.

Public Works	FY17	FY18	FY19	FY20	% Increase
Wages	\$ 313,469	\$ 311,651	\$ 331,735	\$ 341,818	3.04%
Expenses	\$ 443,106	\$ 447,467	\$ 472,900	\$ 488,050	3.20%
Cemetery	\$ 2,300	\$ 2,300	\$ 2,300	\$ 2,300	0.00%
Tree Warden	\$ 4,806	\$ 5,806	\$ 5,845	\$ 5,882	0.63%
Total	\$ 763,681	\$ 767,224	\$ 812,780	\$ 838,050	3.11%

Resident Services

This budget recommends a 15.21% decrease in residential services expenses. Budget highlights includes moving five employees onto the town's pay plan in addition to a COLA raise for the Library Director. The recommendation also includes a 46% reduction in the veteran services line item due to a multi-year analysis that indicates less financial need. Our regional shared services agreement for veteran services includes a focus on outreach. This, in addition to the Massachusetts State Law that requires all veterans in need will be granted Chapter 115 assistance assures residents, despite this increase, that Hubbardston will continue to meet the needs of its veterans regardless of this reduction. This budget also includes a modest increase for the Memorial Day Parade Committee to help with the honoring of our veterans.

Resident Services	FY17	FY18	FY19	FY20	% Increase
Council on Aging	\$ 10,609	\$ 10,769	\$ 18,765	\$ 19,262	2.65%
Veterans	\$ 47,293	\$ 67,293	\$ 73,950	\$ 44,050	-40.43%
Library	\$ 72,650	\$ 76,104	\$ 81,208	\$ 82,769	1.92%
Commissions	\$ 1,650	\$ 1,650	\$ 1,750	\$ 1,750	0.00%
Celebrations	\$ 1,000	\$ 1,000	\$ 1,000	\$ 1,500	50.00%
Parks	\$ 3,100	\$ 3,100	\$ 3,100	\$ 3,100	0.00%
Total	\$ 136,302	\$ 159,916	\$ 179,773	\$ 152,431	-15.21%

Indirect Costs

This budget recommends a 2.86% increase in debt service and a 0.04% increase in indirect costs for a total increase of .93% in this budget category. This debt level represents 3.01% of the total operating budget (and 3.35% when you include school debt), well within the town's financial policies. The debt service includes fully funding the new fire truck and dump truck appropriated in 2017. Although there is a small increase in insurance (and indirect costs), large percent increases were avoided with a reduction in the Worcester Regional Retirement System assessment and a level funding of the town health insurance line item.

Unclassified	FY17	FY18	FY19	FY20	% Increase
Debt Service	\$ 228,950	\$ 227,650	\$ 271,305	\$ 279,071	2.86%
Indirect Costs	\$ 523,782	\$ 602,241	\$ 589,087	\$ 589,316	0.04%
Total	\$ 752,732	\$ 829,891	\$ 860,392	\$ 868,387	0.93%



Capital Budget

This year Hubbardston invested in a revamped capital plan, culminating in a complete five year capital projection. This is a fluid document and subject to change, but serves as a foundation for the newly initiated Capital Improvement Planning Committee.

Town policy recommends a 6% investment in capital annually. This number includes existing capital (debt), school capital (new project and previous debt) and recommended purchases for the coming fiscal year. This proposed budget recommends an aggressive 6.18% expenditure in FY20, a total of \$573,181 to include \$263,000 in new purchases.

To fund the proposed FY20 Capital Projects, this budget is recommending using \$58,190 from the capital stabilization fund and \$204,810 from unappropriated free cash. This maintains the town policy of 1% remaining in capital stabilization fund and allows for a remaining balance in free cash for use in FY21.

Proj #	Project Title	FY2020	FY2021	FY2022	FY2023	FY2024
DPW10	Mini Excavator					\$ 45,000
DPW12	Asphalt Hotbox		\$ 45,000			
DPW13	Pavement Roller with Trailer	\$ 35,000				
DPW16	Dump Truck with Plow	\$ 95,000				
DPW17	Dump Truck with Plow		\$ 100,000			
DPW21	Dump Truck with Plow					\$ 200,000
DPW27	DPW septic system replacement					\$ 40,000
DPW28	Additional Road Repair			\$ 100,000	\$ 100,000	\$ 100,000
DPW3	Exhaust Mitigation System (DPW)			\$ 26,000		
DPW4	DPW Garage Roof				\$ 100,000	
DPW9	Ford F450 with Plow (Director Vehicle)					\$ 60,000
FD1	Firefighter Turnout Gear			\$ 17,000		
FD2	FD Portable Radios		\$ 10,000			
FD3	FD Radio Pagers		\$ 8,000			
FD5	Utility Pick Up Truck			\$ 27,000		
FD6	Emergency Response Truck (Fire Chief)		\$ 42,000			
FD8	Fire Station One Roof					\$ 28,000
LIB3	Windows and Boiler Replacement			\$ 18,000		\$ 47,000
LIB4	Basement Flooring Replacement				\$ 20,000	
LIB5	Repair library skylight/roof (annex)	\$ 11,000				
PD1	Vehicle camera and storage server		\$ 10,000	\$ 5,000		
PD4	Handguns	\$ 3,000				
PD5	Police Cruiser (cycle)	\$ 46,000		\$ 50,000		\$ 55,000
SCH2	Center School Cafeteria Equipment	\$ 25,000				
SCH4	Center School Roof					\$1,500,000
SCH7	School Water Pump Booster System	\$ 18,000				
TA1	Town Office IT Hardware and Software	\$ 30,000	\$ 30,000			
	TOTAL	\$ 263,000	\$ 245,000	\$ 243,000	\$ 220,000	\$2,075,000
	% Operating Budget		6.18%			

While the previous chart identifies expenditures included in the FY20 Proposed Budget, the town continues to aggressively seek outside funding for major capital improvement projects to include, roads, bridges and other important infrastructure. The following outlines the remainder of the five-year capital plan not impacting the FY20 budget.

DPW	Culvert Replacement	\$ 100,000					DER and MVP Grants
DPW25	Chapter 90 Road Repair	\$ 356,673	\$ 356,673	\$ 356,673	\$ 356,673	\$ 356,673	Chp 90
DPW29	Route 68 North Reconstruction Project	\$4,044,376					STIP
DPW30	Reconstruct Flagg Road (MassWorks)		\$1,000,000				MassWorks STRAP
DPW31	Williamsville Road Repair					\$1,000,000	MassWorks STRAP
DPW32	Route 62 Bridge Repair (Ware River)		\$2,263,642				STIP
DPW33	Evergreen Road Bridge (Mason Brook)	\$2,281,402					STIP
DPW34	Williamsville Road Bridge (Burnshirt)				\$ 884,240		STIP
LIB2	Assess and repair Library foundation	\$ 10,000					CPA
FD7	Engine 3 Deck Gun	\$ 7,000					FD vehicle replacement account
PD2	Replace four AEDs	\$ 8,000					Holden Hospital Account
TA2	Upgrade department software	\$ 28,000					Community Compact IT Grant
TA3	Enact document management system	\$ 40,000					CPA funds, Community Compact Grant
TCC1	Extension of Williamsville Sidewalk					\$ 150,000	Complete Streets
TCC2	Brigham Street Sidewalk				\$ 250,000		Complete Streets
TCC3	High Street Sidewalk	\$ 175,000		\$ 400,000			Complete Streets
TCC4	Pedestrian Lighting on Main Street		\$ 50,000	\$ 50,000	\$ 25,000		Complete Streets
TCC5	Rainbow's End Playground			\$ 100,000			CPA funds, Private Fundraising
		\$7,446,452	\$3,955,315	\$1,204,673	\$1,755,913	\$5,136,673	



Debt Service

Town policy requires responsibly addressing capital needs and providing flexibility in current and future operating budgets by maintaining debt. This budget recommends a total debt service of \$310,181 or 3.35% of the total operating budget. This falls within the town's debt management policy (2-5% annually). This recommended figure includes municipal and school capital and includes the continued funding of the new fire truck and plow truck appropriated in FY18.

Town of Hubbardston						
Outstanding Debt						
<u>MUNICIPAL</u>	FY2020	FY2021	FY 2022	FY 2023	FY 2024	
Short Term Debt	\$ 2,000.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	\$ 2,500.00	
Long Term Debt						
Road Project (3/25/15)	\$ 165,000.00	\$ 165,000.00	\$ 165,000.00	\$ 165,000.00		
\$1.3 million	\$ 19,800.00	\$ 14,850.00	\$ 9,000.00	\$ 4,950.00		
Dump Truck (3/25/15)	\$ 15,000.00	\$ 15,000.00				
\$135K	\$ 1,800.00	\$ 1,350.00				
Dump Truck (6/18)/Fire Engine 6/17	\$ 55,000.00	\$ 55,000.00	\$ 55,000.00	\$ 55,000.00	\$ 55,000.00	
\$600k	\$ 15,321.43	\$ 28,167.86	\$ 22,000.00	\$ 19,250.00	\$ 16,500.00	
Police Cruiser (3/25/15)	\$ 5,000.00	\$ -				
\$25K	\$ 150.00	\$ -				
Municipal Total	\$ 279,071.43	\$ 281,867.86	\$ 253,500.00	\$ 246,700.00	\$ 74,000.00	
<u>SCHOOLS</u>						
Green Repair	\$ 31,110.00	\$ 29,363.00	\$ 28,623.00	\$ 28,130.00	\$ 27,636.00	
Total	\$ 31,110.00	\$ 29,363.00	\$ 28,623.00	\$ 28,130.00	\$ 27,636.00	
Grand Total	\$ 310,181.43	\$ 311,230.86	\$ 282,123.00	\$ 274,830.00	\$ 101,636.00	
Operating Budget	\$ 9,268,922.16	\$ 9,546,989.82	\$ 9,833,399.52	\$ 10,128,401.50	\$ 10,432,253.55	
Debt as %	3.35%	3.26%	2.87%	2.71%	0.97%	



Town Reserves

Town Financial Management Policies published in 2018 identified an emphasis on financial reserves to help the Town stabilize finances and maintain operations during difficult economic periods. Additionally, strong reserve policies allow town leaders to plan for long-term sustainability by directing resources with a 5-10-year projection. The following is a snap shot of the town's financial reserves based on the recommendations made in this budget.

	FY16	FY17	FY18	FY19	Proposed FY20
Operating Budget	\$ 7,923,103	\$ 8,459,842	\$ 8,712,866	\$ 9,023,955	\$ 9,268,922
Stabilization Fund (5%)	\$ 220,506	\$ 233,103	\$ 431,685	\$ 390,950	\$ 390,950
%	2.78%	2.76%	4.95%	4.33%	4.22%
Municipal Capital Stabilization Fund (1%)	\$ 346,745	\$ 351,122	\$ 135,229	\$ 158,190	\$ 100,000
%	4.38%	4.15%	1.55%	1.75%	1.08%
Free Cash (5%)	\$ 236,143	\$ 427,853	\$ 638,442	\$ 495,561	\$ 401,513
%	2.98%	5.06%	7.33%	5.49%	4.33%
Total	\$ 803,393.51	\$ 1,012,077.81	\$ 1,205,356.00	\$ 1,044,701.00	\$ 892,463.00
	10.14%	11.96%	13.83%	11.58%	9.63%

This proposed budget maintains all goals as outlined by town leaders and aligns with published financial policies. If additional revenues become available during this budget cycle, this budget recommends the following priorities:

- 1.) Further reduce free cash usage in the operating budget
- 2.) Contribute additional monies to the stabilization fund in order to reach the 5% goal ahead of the five-year projected schedule.
- 3.) Maintain a balance of \$100,000 in free cash after Town Meeting appropriation in order to ensure flexibility for the FY21 operating and capital budgets.
- 4.) Contribute additional monies to the capital stabilization fund in order to provide greater flexibility for the aggressive FY20-24 Capital Improvement Plan.



Updated Financial Forecast

Using one-time revenues and receiving higher than expected revenues from the state and new growth allowed this proposed budget to come in balanced despite predictions in the FY20-24 Financial Forecast. This also depends on an accurate estimation of the QRSD budget to be determined in April.

However, the town continues to see a structural deficit moving forward. Even with a limited expense growth of 2.79%, town residents can expect deficits ranging from \$266k to \$782k over the next five years. Revenues must continue to beat projections and assessments must continue to come in lower than five year averages to maintain balanced budgets in the next five years.

In short, Hubbardston will continue to survive year-to-year all things remaining equal, but long term budget stability and growth will only be solved by substantial revenue increases.

Property Tax	FY2020	FY2021	FY2022	FY2023	FY2024
Prior Year Levy Limit	7,032,910	7,282,233	7,514,289	7,752,146	7,995,949
2 1/2% Increase	175,823	182,056	187,857	193,804	199,899
New Growth	73,500	50,000	50,000	50,000	50,000
Capital Exclusion	-	-	-	-	-
Debt Exclusions/Overlay	(35,000)	(40,000)	(40,000)	(40,000)	(40,000)
Total	7,247,233	7,474,289	7,712,146	7,955,949	8,205,848

Revenue	FY2020	FY2021	FY2022	FY2022	FY2023
	<i>Forecast</i>	<i>Forecast</i>	<i>Forecast</i>	<i>Forecast</i>	<i>Forecast</i>
Taxes	\$ 7,247,233	\$ 7,474,289	\$ 7,712,146	\$ 7,955,949	\$ 8,205,848
State Aid	\$ 627,967	\$ 644,271	\$ 657,156	\$ 670,299	\$ 683,705
Local Receipts	\$ 1,294,355	\$ 1,307,301	\$ 1,320,374	\$ 1,333,577	\$ 1,346,913
Free Cash/Other Available funds	\$ 100,000				
Total:	\$ 9,269,555	\$ 9,425,860	\$ 9,689,676	\$ 9,959,826	\$ 10,236,467

	FY2020	FY2021	FY2022	FY2022	FY2023
Revenue	\$ 9,269,555	\$ 9,425,860	\$ 9,689,676	\$ 9,959,826	\$ 10,236,467
Expense	\$ 9,268,921	\$ 9,692,705	\$ 10,099,283	\$ 10,533,172	\$ 11,019,463
	\$ 634	\$ (266,845)	\$ (409,608)	\$ (573,346)	\$ (782,997)



What's Next?

This proposed budget is balanced and maintains moderate resilience. It is also derived from solid estimates and known costs, meaning there is not much expectation for change. The primary concern with this proposed budget is the unknown assessment figure for the QRSD, the last piece of the FY20 puzzle. Once known, all identified expenditures will be finalized and ready for Finance Committee and Board of Selectmen recommendation.

If the QRSD exceeds the assessment expectation found in this budget, the following recommendations will be made to town officials in priority order:

- 1.) Adjust revenue projections (would no longer align with goals)
- 2.) Reduce department increases
- 3.) Reduce capital plan and consider additional free cash usage
- 4.) Consider an operational override

Additionally, it should be noted that in previous years, new growth and local aid numbers saw marginal increases as we approached Town Meeting. While not guaranteed, that knowledge does give this budget more resilience. There are no recommendations for further expenditure even with potential revenue increases. This is due to shortfalls identified in the financial forecast. Any potential revenue increases should be allocated in the following order.

- 1.) Reduce free cash for operating budget
- 2.) Reduce local receipts estimates closer to 90% of FY18 actuals
- 3.) Fund town reserves

Town of Hubbardston, Massachusetts
FY 2020 Operating and Capital Budget Summary

Revenue Source	Accounting	Administrator	Comments
Property Taxes	\$ 7,032,910	\$ 7,032,910	FY19 Tax Levy
Prop 2 1/2 Increase	\$ 175,823	\$ 175,823	Allowed by MGL
Add New Growth	\$ 63,500	\$ 73,500	Verified by Assessors 1/30/19
Less Snow & Ice Deficit	\$ -	\$ -	
Less Reserve for Abatement	\$ (35,000)	\$ (35,000)	
Net Property Tax Revenue	\$ 7,237,233	\$ 7,247,233	
Capital Offset (Free Cash)	\$ 100,000	\$ 100,000	
Total Receipts	\$ 612,022	\$ 637,989	House 1 (Jan 23, 2019)
Less offsets/Assessments	\$ (12,747)	\$ (10,011)	House 1 (Jan 23, 2019)
Projected Local Aid	\$ 599,275	\$ 627,978	
Projected Local Receipts	\$ 1,267,180	\$ 1,294,355	By Policy
Total Operating Revenues	\$ 9,203,688	\$ 9,269,566	
FY 2019 Budget	\$ 9,294,608	\$ 9,268,922	
Operating Surplus/(Shortfall)	\$ (90,921)	\$ 644	
Capital Budget Sources			
Unappropriated Free Cash	\$ 401,513	\$ 401,513	DOR Verified
Cash from Municipal Stabilization		\$ 58,190	
		\$ 459,703	
Free Cash Uses			
2020 Capital Budget	\$ -	\$ 263,000	Capital Plan
Free Cash for FY20 Budget		\$ 100,000	FY20 Budget Revenue
Senior Work Off		\$ 15,000	Warrant Article
Cemetery Machinery		\$ 6,000	Warrant Article
		\$ -	
Sub Total Capital and Warrants	\$ -	\$ 384,000	
Net Available Free Cash	\$ 401,513	\$ 75,703	

Account Number	Account Name	FY 2017 Approved	FY 2018 Approved	FY 2019 Approved	FY 2020 Requested	FY 2020 Administrator	Percent Increase	FY20 COMMENTS
GENERAL GOVERNMENT								
Executive								
001-122-5110-0001	Executive Assistant	\$24,977	\$25,477	\$32,825	\$32,825	\$34,636	5.52%	PP - E1
001-122-5700-0000	Select Board Expense	\$8,000	\$8,000	\$8,000	\$8,000	\$8,000	0.00%	
001-122-5700-0001	Binding of Records	\$0	\$0	\$1,000	\$100	\$100	-90.00%	Up to date on old bindings
001-122-5940-0000	Warrant Mailings			\$1,000	\$2,000	\$2,000	100.00%	Actual Cost
001-129-5110-0000	Town Administrator Salary	\$81,500	\$81,500	\$85,000	\$88,000	\$89,760	2.00%	6mo Increase, with COLA
001-129-5700-0000	Town Administrator Expense	\$1,559	\$2,700	\$3,600	\$3,600	\$3,600	0.00%	
	Total Executive	\$116,036	\$117,677	\$131,425	\$134,525	\$138,096	5.08%	
Town Clerk								
001-161-5110-0000	Town Clerk Salary	\$36,264	\$36,989	\$41,325	\$41,325	\$40,357	-2.34%	PP - H2
001-161-5190-0000	Town Clerk Certification	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	0.00%	
001-161-5700-0000	Town Clerk Expenses	\$3,520	\$3,819	\$3,814	\$3,836	\$3,836	0.58%	Postage and Supplies
001-161-5110-0001	Asst. Town Clerk Wages	\$2,750	\$2,805	\$2,635	\$2,635	\$2,573	-2.35%	PP - C1, 3 Hours
001-162-5700-0000	Elections & Registrations	\$10,355	\$4,935	\$10,260	\$7,000	\$7,000	-31.77%	2 elections (3 in FY19)
001-163-5110-0000	Board of Registrars Wages	\$437	\$446	\$446	\$446	\$446	0.00%	
	Total Town Clerk	\$54,306	\$49,994	\$59,480	\$56,242	\$55,212	-7.18%	
Accounting								
001-135-5300-0004	Town Accountant Services	\$35,000	\$35,000	\$42,000	\$48,000	\$37,800	-10.00%	New contract proposal
001-135-5420-0000	Town Accountant Expense	\$200	\$200	\$200	\$200	\$200	0.00%	
001-135-5300-0000	Annual Audit	\$15,500	\$18,500	\$19,000	\$19,000	\$19,500	2.63%	Requested by Department
	Total Accounting	\$50,700	\$59,700	\$61,200	\$67,200	\$57,500	-6%	
Assessors								
001-141-5110-0002	Assessing Assistant	\$19,434	\$19,830	\$14,040	\$14,040	\$13,083	-6.82%	PP - D1, 14 hours
001-141-5420-0000	Assessors' Expenses	\$5,814	\$5,814	\$6,000	\$10,000	\$6,000	0.00%	Requested by Assessors, removed by TA
NEW	Assessor's Stipends	\$0	\$0	\$0	\$3,835	\$0		Requested by assessors, removed by TA
001-141-5300-0000	Assessors' Contracted Services	\$60,000	\$61,800	\$63,700	\$63,700	\$65,200	2.35%	New contract proposal
	Total Assessors	\$85,248	\$87,444	\$83,740	\$91,575	\$84,283	0.65%	
Treasurer/Collector								
001-149-5110-0000	Treasurer/Collector Salary	\$53,423	\$59,367	\$60,850	\$60,850	\$62,991	3.52%	PP - J8
001-149-5190-0000	Treasurer/Collector Certification	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	0.00%	
001-149-5110-0002	Finance Assistant	\$0	\$5,000	\$16,670	\$16,670	\$17,755	6.51%	PP - D1, 19 hours
001-149-5700-0000	Treasurer/Collector Expense	\$9,800	\$10,000	\$10,250	\$11,825	\$11,825	15.37%	
001-149-5300-0000	Treasurer/Collector Payroll Services	\$2,500	\$3,000	\$3,000	\$3,000	\$3,000	0.00%	
001-149-5700-0001	Treasurer/Collector Tax Title Expense	\$4,000	\$5,000	\$5,000	\$5,000	\$5,000	0.00%	
	Total Treasurer/Collector	\$91,490	\$83,367	\$96,770	\$98,345	\$101,571	4.96%	
Legal Services								
001-151-5300-0000	Legal Services	\$35,000	\$40,000	\$40,000	\$40,000	\$40,000	0.00%	
	Total Legal Services	\$35,000	\$40,000	\$40,000	\$40,000	\$40,000	0.00%	
Conservation Commission								
001-171-5700-0000	Conservation Comm. Expenses	\$1,172	\$1,172	\$1,172	\$1,172	\$1,172	0.00%	
	Total Conservation Commission	\$1,172	\$1,172	\$1,172	\$1,172	\$1,172	0.00%	
Operations Support								
001-122-5210-0000	Town Office Utilities & Maintenance	\$30,000	\$30,000	\$31,000	\$31,000	\$31,000	0.00%	
001-122-5110-0003	Town Custodian			\$7,500	\$7,500	\$7,655	2.07%	PP - B1, 10 hours
001-122-5230-0000	Town Office Phone	\$7,000	\$7,500	\$7,500	\$6,500	\$6,500	-13.33%	New agreement
001-122-5240-0000	IT (Computer) Maintenance	\$61,000	\$65,000	\$60,000	\$60,000	\$65,000	8.33%	Additional software
001-122-5300-0003	Town Website	\$0	\$6,000	\$6,000	\$5,500	\$5,500	-8.33%	Website plus DocuSign
001-122-5400-0000	Copier Expense	\$4,500	\$5,000	\$5,000	\$3,000	\$3,000	-40.00%	New contract
	Total Operations Support	\$106,500	\$111,500	\$117,000	\$113,500	\$116,655	1.41%	
Other General Government								
001-176-5110-0000	Board of Appeals Assistant Wages	\$500	\$500	\$500	\$500	\$500	0.00%	
001-176-5700-0000	Board of Appeals Expense	\$675	\$675	\$675	\$675	\$675	0.00%	
001-195-5700-0000	Town Report	\$500	\$500	\$500	\$500	\$500	0.00%	
001-114-5110-0000	Moderator Salary	\$100	\$100	\$100	\$100	\$100	0.00%	
001-131-5420-0000	Finance Committee Expenses	\$200	\$200	\$200	\$200	\$200	0.00%	
001-132-5700-0000	Finance Committee Reserve Fund	\$35,000	\$35,000	\$35,000	\$35,000	\$35,000	0.00%	
	Total Other General Government	\$36,975	\$36,975	\$36,975	\$36,975	\$36,975	0.00%	
	TOTAL GENERAL GOVERNMENT	\$577,427	\$587,829	\$627,762	\$639,534	\$633,464	0.91%	
PUBLIC SAFETY								
Police Department								
001-210-5110-0000	Police Chief Salary	\$92,716	\$94,570	\$96,900	\$98,325	\$101,766	3.50%	Contractual increase

001-210-5110-0002	Police Wages	\$380,327	\$423,866	\$447,944	\$476,324	\$476,324	6.34%	Structural deficit and COLA
001-210-5110-0003	Police Training Wages	\$12,055	\$15,076	\$14,782	\$17,782	\$17,782	20.29%	COLA
001-210-5110-0001	Police Assistant	\$13,338	\$15,318	\$14,425	\$15,435	\$15,435	7.00%	PP C-1, 18 Hours
001-210-5700-0000	Police Dept. Maintenance	\$11,900	\$12,490	\$12,490	\$12,490	\$12,490	0.00%	
001-210-5240-0000	Police Dept. Vehicle Maintenance	\$7,290	\$7,750	\$7,750	\$7,750	\$7,750	0.00%	
001-210-5850-0000	Police Dept. Equipment & Outlay	\$13,725	\$14,325	\$14,849	\$15,574	\$15,574	4.88%	
	Total Police Department	\$537,351	\$563,395	\$609,140	\$642,670	\$647,121	6.24%	
Fire Department								
001-220-5110-0000	Fire Chief Salary (Inc Hol)	\$38,974	\$39,754	\$81,100	\$81,100	\$82,722	2.00%	COLA
001-220-5110-0001	Fire Department - Wages	\$95,308	\$100,331	\$257,165	\$264,000	\$264,000	8.15%	Union Increase, stipends, fund additional FTE
001-220-5190-0000	Fire Department - Call Wages	\$44,363	\$44,479	\$65,000	\$65,000	\$65,000	0.00%	
001-220-5430-0000	Fire Department Maintenance	\$13,600	\$13,600	\$13,600	\$13,600	\$13,600	0.00%	
001-220-5240-0000	Fire Department Vehicle Maint.	\$19,700	\$19,700	\$20,000	\$20,000	\$20,000	0.00%	
001-220-5600-0000	Fire Department Equipment & Outlay	\$13,875	\$14,875	\$17,000	\$17,000	\$17,000	0.00%	
001-231-5290-0000	Lease of Space	\$18,600	\$18,972	\$21,500	\$22,356	\$22,356	3.98%	
001-231-5300-0000	Prof. Expenses/Services	\$17,900	\$19,400	\$29,400	\$29,400	\$29,400	0.00%	
001-231-5500-0000	Medical Supplies	\$12,500	\$12,500	\$23,000	\$23,000	\$23,000	0.00%	
	Total Fire	\$295,370	\$304,161	\$514,700	\$528,621	\$537,078	4.35%	
Other Emergency Services								
001-299-5110-0000	Rutland Regional Dispatch Assessment	\$128,000	\$126,584	\$129,786	\$129,786	\$125,552	-3.26%	Assessment
001-299-5700-0000	Dispatch Maintenance & Equip	\$0	\$5,000	\$2,000	\$0	\$0	-100.00%	No longer used
001-291-5110-0000	Emergency Planning Director	\$1,000	\$1,020	\$1,045	\$1,045	\$1,066	2.01%	COLA
001-291-5700-0000	Emergency Planning Expenses	\$1,333	\$1,333	\$1,333	\$1,333	\$1,333	0.00%	
001-292-5110-0000	Regional Animal Control Officer Services	\$16,350	\$16,350	\$16,826	\$17,247	\$17,247	2.50%	Contractual
	Other Emergency Services	\$146,683	\$150,287	\$149,411	\$149,411	\$145,198	-3.84%	
	TOTAL PUBLIC SAFETY	\$973,404	\$1,037,843	\$1,274,830	\$1,320,702	\$1,329,398	4.28%	
GROWTH MANAGEMENT								
Building Inspection								
001-192-5110-0000	Regional Building Inspection Services	\$27,734	\$28,289	\$24,185	\$24,000	\$24,000	-0.76%	New regional agreement
001-192-5700-0000	Building Department Expense	\$2,753	\$2,753	\$3,610	\$1,135	\$1,135	-68.56%	
001-519-5110-0000	Animal Inspector Salary	\$1,500	\$1,500	\$1,500	\$0	\$0	-100.00%	Part of ACO regional agreement
001-519-5705-0000	Animal Inspector Expense	\$663	\$663	\$663	\$0	\$0	-100.00%	Part of ACO regional agreement
	Total Building Inspection	\$32,650	\$33,205	\$29,958	\$25,135	\$25,135	-16.10%	
Planning Board								
001-175-5700-0000	Planning Board Expenses	\$1,000	\$1,000	\$1,000	\$6,840	\$1,000	0.00%	Emails added to IT, Digital Project to CPA Grant
NEW	Economic Development Coordinator	\$0	\$0	\$0	\$3,000	\$3,000	0.00%	Shared Service with Grant (1 year)
001-175-5700-0001	Montachusett Reg. Plan, District Assessment	\$1,424	\$1,520	\$1,500	\$1,500	\$1,533	2.20%	Assessment received 1/7/19
001-175-5300-0000	Master Plan Expenses	\$0	\$0	\$1,500	\$1,500	\$1,500	0.00%	
001-175-5110-0000	Planning Board Assistant	\$0	\$0	\$11,500	\$11,500	\$12,005	4.39%	PP C-1
	Total Planning Board	\$2,424	\$2,520	\$15,500	\$24,340	\$19,038	22.83%	
Inspectional Services								
001-510-5110-0000	Board of Health and ConCom Assistant	\$11,484	\$11,714	\$12,150	\$12,636	\$12,863	5.87%	PP C-1
001-192-5110-0001	Building Assistant	\$11,843	\$12,080	\$14,425	\$14,425	\$15,435	7.00%	PP C-1
	Total Inspectional Services Support	\$23,327	\$23,794	\$26,575	\$27,061	\$28,298	6.48%	
Health Services								
001-510-5300-0000	Landfill monitoring	\$9,180	\$9,180	\$9,180	\$9,180	\$9,180	0.00%	
001-510-5700-0000	Board of Health Expenses	\$2,363	\$2,363	\$2,363	\$2,363	\$2,363	0.00%	
	Total Health Services	\$11,543	\$11,543	\$11,543	\$11,543	\$11,543	0.00%	
TOTAL GROWTH MANAGEMENT								
		\$69,944	\$71,062	\$83,576	\$88,079	\$84,014	0.52%	
EDUCATION								
001-300-5700-0000	Quabbin Regional School Assessment	\$4,276,871	\$4,323,137	\$4,493,506	\$4,673,246	\$4,673,246	4.00%	
001-350-5700-0000	Montachusett Reg. Voc. Tech. Assessment	\$50,127	\$65,844	\$658,822	\$658,822	\$658,822	0.00%	
001-300-5700-0005	QRSD Green Repair	\$35,783	\$31,896	\$32,575	\$31,110	\$31,110	-4.32%	
	TOTAL EDUCATION	\$4,944,759	\$5,020,877	\$5,184,843	\$5,363,178	\$5,363,178	3.44%	
PUBLIC WORKS AND CEMETERIES								
Public Works Wages								
001-421-5110-0000	DPW Director	\$76,557	\$70,000	\$73,635	\$73,635	\$75,108	2.00%	COLA
001-422-5110-0001	DPW Wages	\$236,912	\$241,651	\$245,900	\$253,847	\$253,847	3.23%	Union Contract
001-422-5110-0002	DPW Assistant			\$12,200	\$12,863	\$12,863	5.43%	PP C-1, 15 Hours
	Total Public Works Wages	\$313,469	\$311,651	\$331,735	\$339,682	\$341,818	3.04%	
Public Works Expenses								
001-424-5700-0000	Municipal Lights	\$5,060	\$5,060	\$5,500	\$5,500	\$5,500	0.00%	
001-422-5240-0000	Total DPW Road Maintenance	\$82,551	\$86,239	\$91,000	\$105,200	\$105,200	15.60%	Culvert repair and materials
001-422-5700-0000	Total General Highway	\$27,995	\$28,668	\$31,500	\$34,261	\$34,261	8.77%	Building repairs
001-422-5240-0001	Total Equip. and Machinery Repairs	\$107,500	\$107,500	\$108,500	\$108,500	\$108,500	0.00%	

001-423-5110-0000	Employee Overtime (Highway Winter Wages)	\$63,000	\$63,000	\$68,000	\$65,239	\$65,239	-4.06%
001-423-5120-0000	Highway Winter Outside Wages	\$3,750	\$3,750	\$4,600	\$4,600	\$4,600	0.00%
001-423-5700-0000	Equip. Supplies & Materials	\$149,750	\$149,750	\$160,000	\$160,000	\$160,000	0.00%
001-423-5290-0000	Plowing of Private Ways	\$3,500	\$3,500	\$3,800	\$3,800	\$4,750	25.00%
	Total DPW Expense	\$443,106	\$447,467	\$472,900	\$487,100	\$488,050	3.20%
	Total DPW	\$756,575	\$759,118	\$804,635	\$826,782	\$829,868	3.14%
	Cemetery						
001-491-5290-0000	Cemetery Maintenance & Improvement	\$500	\$500	\$500	\$500	\$500	0.00%
001-491-5850-0000	Cemetery Equipment & Outlay	\$1,300	\$1,300	\$1,300	\$1,300	\$1,300	0.00%
001-491-5700-0001	Veterans' Graves	\$500	\$500	\$500	\$500	\$500	0.00%
	Total Cemeteries	\$2,300	\$2,300	\$2,300	\$2,300	\$2,300	0.00%
	Tree Warden						
001-249-5110-0000	Tree Warden Wages	\$1,806	\$1,806	\$1,845	\$1,845	\$1,882	2.01%
001-249-5700-0000	Tree Warden Outside Services	\$3,000	\$4,000	\$4,000	\$4,000	\$4,000	0.00%
	Total Tree Warden	\$4,806	\$5,806	\$5,845	\$5,845	\$5,882	0.63%
	TOTAL PUBLIC WORKS & CEMETERIES	\$763,681	\$767,224	\$812,780	\$834,927	\$838,050	3.11%
	RESIDENT SERVICES						
	Council On Aging						
001-541-5240-0000	MART Van Expenses	\$100	\$100	\$100	\$100	\$0	-100.00%
001-541-5110-0000	Council on Aging Director	\$6,009	\$6,129	\$13,665	\$13,665	\$14,262	4.37%
001-541-5700-0000	Council on Aging Expense	\$2,000	\$2,040	\$5,000	\$5,000	\$5,000	0.00%
	Total Council on Aging	\$10,609	\$10,769	\$18,765	\$18,765	\$19,262	2.65%
	Veteran Services						
001-543-5110-0000	Veteran Services Officer Regional Assessment	\$1,506	\$1,506	\$8,000	\$8,000	\$8,000	0.00%
001-543-5700-0000	Veteran Services Expenses	\$137	\$137	\$200	\$200	\$200	0.00%
001-543-5700-0001	Veteran Training Expenses	\$350	\$350	\$350	\$350	\$350	0.00%
001-543-5770-0000	Veteran Benefits	\$45,000	\$65,000	\$65,000	\$65,000	\$35,000	-46.15%
001-543-5770-0001	Veteran Flags	\$300	\$300	\$400	\$500	\$500	25.00%
	Total Veteran Services	\$47,293	\$67,293	\$73,950	\$74,050	\$44,050	-40.43%
	Library						
001-610-5110-0000	Library Director			\$30,405	\$30,405	\$31,014	2.00%
001-610-5110-0001	Library Assistant Wages	\$37,065	\$37,807	\$11,560	\$11,560	\$12,512	8.24%
001-610-5700-0001	Library Utilities & Maintenance	\$18,243	\$20,608	\$21,200	\$21,200	\$21,200	0.00%
001-610-5400-0000	Library Books & Materials	\$17,342	\$17,689	\$18,043	\$18,043	\$18,043	0.00%
	Total Library	\$72,650	\$76,104	\$81,208	\$81,208	\$82,769	1.92%
	Commissions						
001-549-5700-0001	Agricultural Commission Expense	\$200	\$200	\$300	\$300	\$300	0.00%
001-691-5700-0000	Historical Commission Expenses	\$200	\$200	\$200	\$200	\$200	0.00%
001-950-5700-0000	Town Clock Maintenance	\$1,250	\$1,250	\$1,250	\$1,250	\$1,250	0.00%
	Total Commission Expenses	\$1,650	\$1,650	\$1,750	\$1,750	\$1,750	0.00%
	Celebrations						
001-692-5700-0000	Memorial Day	\$1,000	\$1,000	\$1,000	\$1,500	\$1,500	50.00%
	Total Celebrations	\$1,000	\$1,000	\$1,000	\$1,500	\$1,500	50.00%
	Park Services & Expense						
001-699-5700-0000	Parks Services & Expense	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	0.00%
	Total Parks	\$3,100	\$3,100	\$3,100	\$3,100	\$3,100	0.00%
	TOTAL RESIDENT SERVICES	\$136,302.00	\$159,916.18	\$179,773.00	\$180,373.00	\$162,431.00	-15.21%
	UNCLASSIFIED						
	Debt Service						
001-752-5925-0000	Interest on Short Term Debt	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	0.00%
001-710-5910-2013	2013 Roads Project (P)	\$165,000	\$165,000	\$165,000	\$165,000	\$165,000	0.00%
001-751-5925-2013	2013 Roads Project (I)	\$33,000	\$29,700	\$24,750	\$19,800	\$19,800	-20.00%
001-710-5910-2014	DPW 6 wheel dump w plow (voled 2014) (P)	\$20,000	\$20,000	\$20,000	\$15,000	\$15,000	-25.00%
001-751-5925-2014	DPW 6 wheel dump w plow (voled 2014) (I)	\$3,400	\$3,400	\$2,400	\$1,800	\$1,800	-25.00%
001-710-5910-2018	Fire Truck/Dump Truck	\$0	\$1,250	\$50,000	\$50,000	\$55,000	0.00%
001-751-5925-2018	Fire Truck/Dump Truck Interest	\$0	\$0	\$1,855	\$14,850	\$15,321	0.00%
001-710-5910-0014	SGT SUV - bought in 2014 (P)	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000	0.00%
001-751-5925-0014	SGT SUV - bought in 2014 (I)	\$550	\$450	\$300	\$150	\$150	-50.00%
	Total Debt Service	\$228,950	\$227,650	\$271,305	\$273,600	\$279,071	2.86%
	Insurance						
001-911-5890-0000	Worcester Regional Retirement	\$200,440	\$238,741	\$260,487	\$255,716	\$255,716	-1.83%
001-914-5150-0000	Ch. 32B (Health Insurance)	\$160,342	\$175,000	\$180,000	\$180,000	\$180,000	0.00%
001-916-5150-0000	FICA Assessment (other employee benefits)	\$27,500	\$28,000	\$28,600	\$28,600	\$28,600	0.00%
001-913-5780-0000	Unemployment Compensation Expense	\$7,500	\$20,500	\$10,000	\$10,000	\$10,000	0.00%
001-945-5740-0000	General Insurance	\$128,000	\$140,000	\$110,000	\$119,900	\$115,000	-4.55%

	Total Insurance	\$523,782	\$602,241	\$589,087	\$594,216	\$589,316	0.04%
	TOTAL UNCLASSIFIED	\$752,732	\$829,891	\$860,392	\$867,816	\$868,387	0.93%
TOTAL OPERATING BUDGET		\$8,218,249	\$8,474,642	\$9,023,955	\$9,294,608	\$9,268,922	2.71%
TOTAL OPERATING REVENUE				\$9,013,984	\$9,269,566	\$9,269,566	2.84%
NET				-\$9,971	-\$25,042	\$644	

**TOWN OF HUBBARDSTON MASSACHUSETTS
AGREEMENT**

THIS AGREEMENT, made this 5th day of February, 2019, by and between the party of the first part, the Town of Hubbardston, hereinafter called "OWNER," acting herein through its Town Administrator, and the party of the second part, Titan Roofing, Inc., doing business as a corporation located in the City of Springfield, County of Hampden, and State of Massachusetts, hereinafter called "CONTRACTOR."

WITNESSETH: That for and in consideration of the payments and agreements hereinafter mentioned, to be made and performed by the OWNER, the CONTRACTOR hereby agrees with the OWNER to commence and complete the project described as follows: reroofing the Hubbardston Public Library, hereinafter called the Project, for the sum of Two Hundred and Seventy Nine Thousand Dollars (\$279,000) and all extra work in connection therewith, under the terms as stated in the Contract Documents; and at his (its or their) own proper cost and expense to furnish all the materials, supplies, machinery equipment, tools, superintendence, labor, insurance, and other accessories and services necessary to complete the said project in accordance with the conditions and prices stated in Section 00.03.00 FORM OF GENERAL BID, Section 00.07.00 GENERAL CONDITIONS, and Section 00.08.00 SUPPLEMENTAL GENERAL CONDITIONS, the plans, which include all maps, plates, blue prints, and the specifications and Contract Documents as prepared by the Owner.

The CONTRACTOR hereby agrees to commence work under this Contract on or before a date to be specified in written "Notice to Proceed" of the OWNER.

The CONTRACTOR further agrees to substantially complete the work no later than August 25, 2019, and to complete at least \$100,000 of work properly invoiced in accordance with the contract documents no later than June 30, 2019.

The CONTRACTOR further agrees to pay as liquidated damages the sum of \$0.00 for each consecutive calendar day thereafter as provided in the Liquidated Damages Paragraph of Article 8 of Section 00.07.00 GENERAL CONDITIONS.

The CONTRACTOR agrees not to discriminate against or exclude any person from participation herein on grounds of race, religion, color, sex, age or national origin; and that it shall take affirmative actions to ensure that applicants are employed, and that employees are treated during their employment, without regard to race, religion, color, sex, age, handicapped status, or national origin.

The CONTRACTOR agrees not to participate in or cooperate with an international boycott, as defined in Section 999 (b)(3) and (4) of the Internal Revenue Code of 1986, as amended, or engage in conduct declared to be unlawful by Section 2 of Chapter 151E of the Massachusetts General Laws.

The OWNER agrees to pay the CONTRACTOR in current funds for the performance of the contract, subject to additions and deductions, as provided in Section 00.07.00 GENERAL CONDITIONS, and to make payments on account thereof as provided in Article 9 of Section 00.07.00 GENERAL CONDITIONS.

IN WITNESS WHEREOF, the parties to these presents have executed this contract in two (2) counterparts, each of which shall be deemed an original, in the year and day first above mentioned.

AGREED:

TOWN OF HUBBARDSTON, MASSACHUSETTS
(Owner – For the Board of Selectmen)

By _____

Ryan M. McLane
Town Administrator

CONTRACTOR:

DocuSigned by:

Shawna Pazmino-Brook

DB463B5A9A554D6...

By _____ Shawna Pazmino-Brook

Shawna Pazmino-Brook

(Name)

Treasurer

(Title)

200 Tapley Street

(Address)

Springfield, MA 01104

(City and State)

Approved as to Form:

For K.P. Law, Town Counsel _____

In accordance with M.G.L. C.44, Section 31C, this is to certify that an appropriation in the amount of this contract is available therefor and that the \$279,000 has been authorized to execute the contract and approve all requisitions and change orders.

By _____

Laurie Bartkus

561D06B12DC0494...

(Owner's Accountant)

Laurie Bartkus

(Name)



Town Administrator

7 MAIN STREET, Unit #3
HUBBARDSTON, MASSACHUSETTS 01452
(978) 928-1400 x 201 FAX (978) 928-3392

To: Board of Selectmen
From: Ryan M. McLane, Town Administrator
Date: February 19, 2019
Subject: Town Administrator's Report

The following is the Town Administrator's report for the period ending February 15, 2019.

1. **FY20 Budget Update** – After the FY20 Town Administrator Proposed Budget presentation, budget documents will be forwarded to the Finance Committee for their first budget meeting on February 27. They plan to hold 2-3 meetings with departments heads to complete their recommendations in time for the Public Hearing on April 16. Your final vote on the budget is scheduled for April 29, 2019.
2. **Annual Town Meeting Warrant Update** – The warrant is now open for submissions. Please let me know if there is anything the Board would like to submit aside from the normal housekeeping articles. The current plan is to review a solid draft of the warrant on April 1. Every article submitted will be invited to speak with the board to ensure all information is available to you prior to final recommendations.
3. **Hubbardston Library Roof Repair Procurement** – Project construction will begin in earnest late this spring pending approval of the final contract. The project is expected to be substantially complete by the end of August.
4. **Fire Union Negotiation Update** – We have a tentative agreement with the fire union that fits within the recommendations made for the FY20 TA budget. We are waiting for final approval from the union before bringing a new CBA for your signature.
5. **Information Reports** – We continue to see strong readership with our Department and Board reports. These newsletters help inform town leaders and residents about the activities of Hubbardston government. We truly appreciate the efforts of our staff and our volunteer officials in helping to compile these useful documents.

- a. All Department (Jan) <https://www.smores.com/0snch>
 - b. All Board (Dec and Jan) <https://www.smores.com/scbdz>
6. **Country Hen Scholarship** – As requested at your last meeting, we began advertising this scholarship opportunity last week. The deadline to apply is April 30th. The Country Hen Scholarship Fund was established to provide scholarships to one or more Hubbardston students graduating from high school with plans to attend accredited colleges or universities. Current college students may also apply. Applicants must have resided in the Town of Hubbardston for at least three years and demonstrated significant community involvement. Each scholarship is \$1000.
7. **Employment and Volunteer Vacancies** – We are currently advertising a full-time position in the Public Works department. Interested applicants should [follow this link to learn more about applying](#). With the finance committee now full, we continue to seek volunteers for our town positions to include vacancies on the Board of Health and the Capital Improvement Planning Committee. These are great opportunities for residents looking to give back to their community.
8. **Employee Recognition** – This week I would like to thank Bobbie Thibault for answering the call and assisting our assessing department with Genny Daniels officially out on leave (she had a beautiful girl by the way, Congrats Genny)! Bobbie is learning this new role while still managing her finance office post. She continually demonstrates her professional versatility and her commitment to Hubbardston.
9. **Upcoming Topics**
- a. Community Benchmarking
 - b. Updated Road Maintenance Plan (Hearing and Presentation)
 - c. Human Resource Policy Updates

Please do not hesitate to contact me if you have any questions.



Ryan M. McLane
Town Administrator