

Town Administrator Report  
July 24, 2018

The following is a summary of the major activities of the Office of the Town Administrator for the previous week.

- 1. Financial Update-**The preliminary numbers are just in for June, allowing me to share with the Board the attached financial report which covers the complete fiscal year. Attached please find the summary revenue and expenditure reports, as well as a detailed analysis of the Local Estimated Receipts (LER) for not only fiscal year 2018, but the preceding five-year period as well. Please note that the expenditure report has not been adjusted to reflect transfers in to cover certain expenditures, or the fact that approximately half of the final payroll for the year is to be split with fiscal year 2019. The unadjusted report shows total expenditures at \$1,877,270 over budget. With the adjustments, total expenditures are estimated to be \$136,000 over budget, representing almost one-half of one percent of budget. This underscores the tight financial year we experienced in FY 2018 and foreshadows increasing pressure in our operating budgets. On the positive side, revenue collections have remained strong, with total general fund collections of \$30,808,865, which is nearly 15% over budget estimates for the year. This helps offset the slight expenditure deficit and maintains our positive cash flow for the year. LER showed a strong close to the year, with June collections up significantly to close the year at \$4,370,457, which is up 6.5% from the previous year.
- 2. Government Finance Officers Distinguished Budget Presentation** –I am pleased to present to you the Town’s first budget document prepared in accordance with the criteria established by the GFOA for a “distinguished budget presentation”. This organization has scoured budgets from cities and towns across the nation in painstakingly developing a detailed set of criteria which make a local government budget qualify to be considered distinguished. The certification of this agency represents the highest level of quality in the presentation of a Town budget, and it incorporates a wealth of financial management information including financial planning, financial policies, organizational structure, vision, goals and objectives and detailed descriptive data. At its simplest a distinguished budget presentation represents a compendium of critical information about the community and its management that can help guide both residents and visitors to find the important information they need on the management and finances of the Town. On a higher level the document helps to communicate to residents, bond rating agencies and all outside groups a high level of attention and accomplishment in financial management. This can build greater trust within the community that management’s fiduciary responsibilities are given strong attention and can also help to increase the confidence of outside rating agencies in the management of the Town. The creation of this document represents just the start of developing ways to present this information to residents and to continue to hone the objectives and policies to improve each year as we use the budget as a management tool.

- 3. Mass Housing Production Program Application-** On Tuesday, July 17 the Town conducted a conference call with officials from Mass Housing regarding the Town's award of technical assistance under the Housing Production Program. Present on the call for the Town were Planning Board Chairman, Ewell Hopkins, Affordable Housing Committee members Jim Bishop and Peter Bradford and me. Mass Housing explained that they conducted a procurement and selected the firm "RKG" to be paired with the Town to conduct a feasibility analysis of the Town-owned 7.76 parcel of property located off Edgartown-Vineyard Haven Road for the potential creation of affordable housing. RKG has brought on board the firm of Weston and Sampson to conduct engineering analysis for potential septic alternatives. On our call we discussed the current lack of sewer treatment capacity as a somewhat limiting factor, and also discussed the wastewater and community planning efforts that are ongoing in our community. We also discussed the issues associated with the pending transfer of the adjacent 34-acre parcel to the Town in a land swap with the Land Bank and the need to provide unimpeded access to this area for future needs of the Town. The next steps are for the State to finalize their contract with RKG, then to attend a meeting of the Board of Selectmen and the Planning Board to receive the input of these Boards regarding the proposed study.
  
- 4. Executive Office of Energy and Environmental Affairs Municipal Technical Assistance Grant**—Working with the Cape and Vineyard Electric Cooperative we have filed a grant application for \$12,500 in technical assistance funds to prepare a feasibility analysis for the installation of a PV system to be located at the site of the capped landfill and to create a microgrid system to power the adjacent Highway Department, transfer station and wastewater treatment facility, including creating backup battery storage to operate the facilities in an uninterrupted fashion during power grid outages. This grant would enable the Town to hire the technical resources needed to pursue the most advanced, state of the art use of solar power generation to achieve the maximum potential benefits for the community. Such a project would appear to have significant financial benefits for the community given the high energy usage at the wastewater plant, especially given the opportunity to directly offset electrical usage at these sites rather than simply selling power back to the grid.
  
- 5. Moped Legislation Update**—Following the Annual Town Meeting vote to petition the legislature for an Act to authorize the Town to limit the rental of mopeds and motor scooters in our Town, I have forwarded a certified copy of the vote to our local legislative delegation. Representative Dylan Fernandes and Senator Julian Cyr have been kind enough to file the attached legislation for this purpose on behalf of the Town. House Bill No. 4727 seeks to enact the petition approved by Town Meeting which would enable the Town to prohibit the rental or leasing of mopeds and motor scooters to the public within the Town. I will make every attempt to closely follow the legislative process for this Bill, and I will alert the Board as to any public hearings or opportunities to testify on behalf of the Bill. Thanks to our legislative delegation with following through on this important issue for the Town.

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TOWN OF OAK BLUFFS  
FY18 EXP TO JUNE 30

P 1  
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FOR 2018 12

JOURNAL DETAIL 2018 12 TO 2018 12

ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	MTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
01 GENERAL FUND						
122 BOARD OF SELECTMEN 460,887.07	469,010.81	598,605.45	116,209.36	0.00	-129,594.64	127.6%
131 FINANCE COMMITTEE 6,155.00	6,155.00	5,238.70	517.50	0.00	916.30	85.1%
132 FIN COMM RESERVE FD. 56,500.00	35,710.00	0.00	0.00	0.00	35,710.00	.0%
135 TOWN ACCOUNTANT 130,392.00	87,720.00	81,913.25	18,936.37	0.00	5,806.75	93.4%
141 ASSESSORS 122,553.04	156,566.47	150,883.28	10,380.22	0.00	5,683.19	96.4%
144 TREASURER (FIXED P/R COST) 4,014,799.00	4,014,799.00	4,042,962.21	152,463.40	0.00	-28,163.21	100.7%
145 TOWN TREASURER 145,516.14	149,144.28	144,934.73	11,101.01	0.00	4,209.55	97.2%
146 TAX COLLECTOR 137,102.00	141,357.60	139,835.29	16,544.75	0.00	1,522.31	98.9%
155 INFORMATION TECHNOLOGY 340,237.00	346,842.78	359,566.79	26,908.43	0.00	-12,724.01	103.7%
161 TOWN CLERK 131,744.00	137,442.87	133,071.92	15,401.93	0.00	4,370.95	96.8%
163 BOARD OF REGISTRARS 29,656.00	29,656.00	19,245.42	2,449.92	0.00	10,410.58	64.9%
171 CONSERVATION COMMISSION 102,808.00	106,896.08	106,075.94	17,780.92	0.00	820.14	99.2%
175 PLANNING BOARD 43,275.00	43,275.00	28,525.65	4,343.22	0.00	14,749.35	65.9%
199 UNCLASSIFIED (SELECTMEN) 1,279,845.00	1,182,845.00	1,183,938.67	-145,567.29	0.00	-1,093.67	100.1%
210 POLICE DEPARTMENT 2,301,161.70	2,453,252.36	2,588,077.44	310,531.18	0.00	-134,825.08	105.5%
220 FIRE DEPARTMENT 287,900.00	294,158.87	289,555.99	103,428.45	0.00	4,602.88	98.4%
231 AMBULANCE SERVICE 337,424.75	337,424.75	339,264.10	43,196.71	0.00	-1,839.35	100.5%
241 BUILDING INSPECTOR 242,330.00	278,166.72	282,875.37	29,791.84	0.00	-4,708.65	101.7%
249 SHELLFISH 193,652.00	195,622.24	191,732.24	18,981.13	0.00	3,890.00	98.0%
291 EMERGENCY MANAGEMENT 21,700.00	21,700.00	18,969.45	1,336.69	0.00	2,730.55	87.4%

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TOWN OF OAK BLUFFS  
FY18 EXP TO JUNE 30

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FOR 2018 12

JOURNAL DETAIL 2018 12 TO 2018 12

ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	MTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED
296 MARINA MANAGER 257,048.80	257,048.80	238,485.56	44,060.34	0.00	18,563.24	92.8%
300 OAK BLUFFS SCHOOL 7,772,626.00	7,799,965.92	7,800,854.60	1,902,295.38	0.00	-888.68	100.0%
301 MARTHA'S VINEYARD REG HS 4,646,813.00	4,646,813.31	4,646,813.31	0.00	0.00	0.00	100.0%
421 HIGHWAY-ADMINISTRATION 1,598,154.00	1,609,992.99	1,582,922.85	189,497.90	0.00	27,070.14	98.3%
519 BOARD OF HEALTH 192,953.24	192,453.24	171,874.61	29,268.56	0.00	20,578.63	89.3%
541 COUNCIL ON AGING 215,456.91	222,711.58	220,574.70	12,455.92	0.00	2,136.88	99.0%
543 VETERANS' SERVICES 61,000.00	69,477.44	69,369.81	6,503.33	0.00	107.63	99.8%
610 LIBRARY 501,424.36	512,250.82	508,823.44	65,092.43	0.00	3,427.38	99.3%
612 ARTS COUNCIL 1,500.00	1,500.00	1,500.00	0.00	0.00	0.00	100.0%
630 PARKS AND RECREATION 166,253.40	166,253.40	153,848.30	14,124.57	0.00	12,405.10	92.5%
710 MATURING DEBT-PRINCIPAL 2,259,719.67	2,259,719.67	2,260,715.62	360,000.00	0.00	-995.95	100.0%
720 MATURING BAN-PRINCIPAL 0.00	0.00	120,000.00	0.00	0.00	-120,000.00	100.0%
750 MATURING DEBT-INTEREST 537,009.87	545,226.19	545,225.91	51,806.25	0.00	0.28	100.0%
760 MATURING BAN-INTEREST 0.00	0.00	1,268.00	0.00	0.00	-1,268.00	100.0%
840 STATE/COUNTY ASSESSMENTS 0.00	0.00	1,120,881.20	123,793.00	0.00	-1,120,881.20	100.0%
900 INTERFUND OPERATING TRANS 0.00	0.00	500,000.00	500,000.00	0.00	-500,000.00	100.0%
TOTAL GENERAL FUND 28,595,596.95	28,771,159.19	30,648,429.80	4,053,633.42	0.00	-1,877,270.61	106.5%
GRAND TOTAL 28,595,596.95	28,771,159.19	30,648,429.80	4,053,633.42	0.00	-1,877,270.61	106.5%

\*\* END OF REPORT - Generated by Deborah Potter \*\*

FOR 2018 12

JOURNAL DETAIL 2018 12 TO 2018 12

ORIGINAL APPROP	REVISED BUDGET	YTD ACTUAL	MTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	% USED
01 GENERAL FUND						
01 MOTOR VEH EXCISE						
-573,000.00	-573,000.00	-907,647.94	-53,001.99	0.00	334,647.94	158.4%
02 OTHER EXCISE						
-536,900.00	-536,900.00	-978,646.93	-115,766.87	0.00	441,746.93	182.3%
03 PENALTIES & INTEREST						
-157,000.00	-157,000.00	-341,850.83	-45,224.91	0.00	184,850.83	217.7%
04 PILOT						
-10,400.00	-10,400.00	-14,338.99	0.00	0.00	3,938.99	137.9%
08 CHGS TRASH DISP						
-160,000.00	-160,000.00	-196,330.38	-29,975.00	0.00	36,330.38	122.7%
10 FEES						
-88,000.00	-88,000.00	-109,533.74	-7,490.00	0.00	21,533.74	124.5%
11 RENTALS						
-85,000.00	-85,000.00	-76,002.00	-21,367.00	0.00	-8,998.00	89.4%
13 DEPT LIBRARY						
-8,000.00	-8,000.00	-9,658.37	-885.10	0.00	1,658.37	120.7%
16 OTHER DEPTL						
-155,000.00	-155,000.00	-239,368.82	-61,346.59	0.00	84,368.82	154.4%
17 LIC & PERMITS						
-260,000.00	-260,000.00	-429,439.37	-33,997.04	0.00	169,439.37	165.2%
19 FINES & FORFEIT						
-15,000.00	-15,000.00	-24,018.25	-3,454.75	0.00	9,018.25	160.1%
20 INVMT INCOME						
-13,000.00	-13,000.00	-15,479.30	0.00	0.00	2,479.30	119.1%
21 MISC RECURRING						
-720,000.00	-720,000.00	-1,082,327.12	-194,327.95	0.00	362,327.12	150.3%
30 CHERRY SHEET						
-1,242,045.00	-1,242,045.00	-1,297,939.00	-114,747.00	0.00	55,894.00	104.5%
33 OTHER INTERGOV						
0.00	0.00	-3,677.00	-3,677.00	0.00	3,677.00	100.0%
41 PERSONAL PROPERTY						
-515,618.63	-515,618.63	-442,985.42	-4,929.84	0.00	-72,633.21	85.9%
42 REAL ESTATE						
-21,152,964.27	-21,152,964.27	-23,084,050.56	-390,541.57	0.00	1,931,086.29	109.1%
44 LIENS & OTHER TAXES						
0.00	0.00	-313,176.74	-80,670.78	0.00	313,176.74	100.0%
49 TRANSFERS IN/OFS						
-1,154,840.48	-1,154,840.48	-1,242,395.00	-1,242,395.00	0.00	87,554.52	107.6%
TOTAL GENERAL FUND						
-26,846,768.38	-26,846,768.38	-30,808,865.76	-2,403,798.39	0.00	3,962,097.38	114.8%
TOTAL REVENUES						
-26,846,768.38	-26,846,768.38	-30,808,865.76	-2,403,798.39	0.00	3,962,097.38	

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TOWN OF OAK BLUFFS  
FY18 REV TO JUNE 30

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FOR 2018 12

JOURNAL DETAIL 2018 12 TO 2018 12

ORIGINAL APPROP	REVISED BUDGET	YTD ACTUAL	MTD ACTUAL	ENCUMBRANCES	AVAILABLE BUDGET	% USED
-26,846,768.38	-26,846,768.38	-30,808,865.76	-2,403,798.39	0.00	3,962,097.38	114.8%
GRAND TOTAL						

\*\* END OF REPORT - Generated by Deborah Potter \*\*

Preliminary Fiscal Year 2018 Local Estimated Receipts By Monthly Collections

	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	YTD
MV Excise	\$ 22,719	\$ 52,243	\$ 11,129	\$ 28,678	\$ 12,623	\$ 21,667	\$ 10,548	\$ 356,077	\$ 189,012	\$ 90,479	\$ 59,473	\$ 53,002	907,648
Other Excise	\$ 2	\$ 145	\$ 406,590	\$ 3,183	\$ 2,797	\$ 389,730	\$ 496	\$ 817	\$ 59,090	\$ -	\$ 30	\$ 115,767	978,647
Penalties and Interest	\$ 21,673	\$ 21,690	\$ 41,663	\$ 21,575	\$ 21,878	\$ 18,705	\$ 27,666	\$ 44,319	\$ 38,443	\$ 13,220	\$ 25,787	\$ 45,225	341,844
Payments in Lieu of Taxes	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,339	\$ -	14,339
Charges for Services-Trash	\$ 32,535	\$ 28,710	\$ 16,905	\$ 9,610	\$ 14,595	\$ 10,170	\$ 7,955	\$ 9,525	\$ 8,315	\$ 8,685	\$ 19,350	\$ 29,975	196,330
Fees	\$ 5,058	\$ 9,034	\$ 7,012	\$ 6,365	\$ 9,748	\$ 9,190	\$ 10,642	\$ 12,106	\$ 5,269	\$ 18,585	\$ 8,386	\$ 7,490	108,884
Rentals	\$ 22,500	\$ 11,185	\$ 5,000	\$ 1,250	\$ 1,500	\$ 250	\$ 600	\$ 3,850	\$ 1,750	\$ 3,250	\$ 3,500	\$ 21,367	76,002
Dept. Revenue-School	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Dept. Revenue-Library	\$ 1,558	\$ 1,684	\$ 1,131	\$ 800	\$ 318	\$ 1,115	\$ 593	\$ 228	\$ 428	\$ 684	\$ 236	\$ 885	9,658
Other Dept. Revenue	\$ 12,313	\$ 9,382	\$ 26,489	\$ 50,863	\$ 7,211	\$ 13,256	\$ 14,855	\$ 9,725	\$ 5,145	\$ 13,332	\$ 15,507	\$ 61,347	239,423
Licenses and Permits	\$ 19,138	\$ 23,978	\$ 17,278	\$ 27,228	\$ 22,998	\$ 23,453	\$ 68,055	\$ 36,397	\$ 24,581	\$ 109,016	\$ 22,670	\$ 33,997	428,789
Fines and Forfeits	\$ 640	\$ 3,490	\$ 4,088	\$ 1,713	\$ 1,833	\$ 945	\$ 2,083	\$ 2,933	\$ 863	\$ 1,140	\$ 839	\$ 3,455	24,018
Investment Income	\$ 1,332	\$ 1,601	\$ 1,184	\$ 1,062	\$ 1,230	\$ 1,121	\$ 1,282	\$ 1,497	\$ 1,563	\$ 1,520	\$ 2,042	\$ -	15,436
Other Miscellaneous-Recurring	\$ 332,081	\$ 337,252	\$ 60,889	\$ 10,816	\$ 2,552	\$ 233	\$ -	\$ -	\$ 11,911	\$ 14,192	\$ 65,185	\$ 194,327	1,029,438
Miscellaneous-Non Recurring	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	-
Total	\$ 471,548	\$ 500,392	\$ 599,358	\$ 163,144	\$ 99,281	\$ 489,835	\$ 144,774	\$ 477,473	\$ 346,369	\$ 274,103	\$ 237,344	\$ 566,837	4,370,457
Cummulative Monthly Totals	\$ 471,548	\$ 971,940	\$ 1,571,298	\$ 1,734,441	\$ 1,833,723	\$ 2,323,558	\$ 2,468,332	\$ 2,945,805	\$ 3,292,174	\$ 3,566,276	\$ 3,803,620	\$ 4,370,457	

Preliminary Fiscal Year 2017 Local Estimated Receipts By Monthly Collections

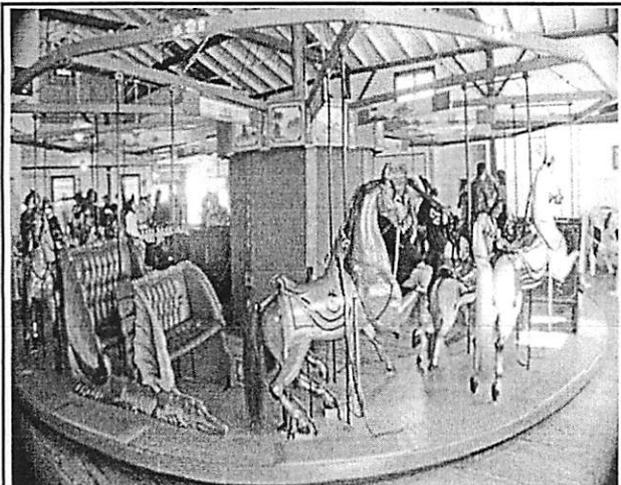
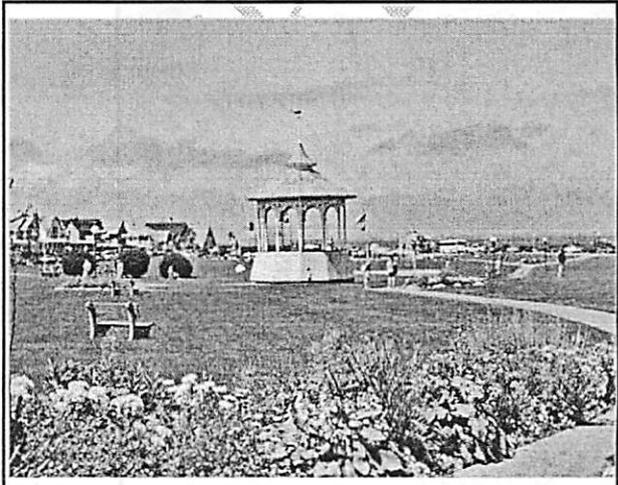
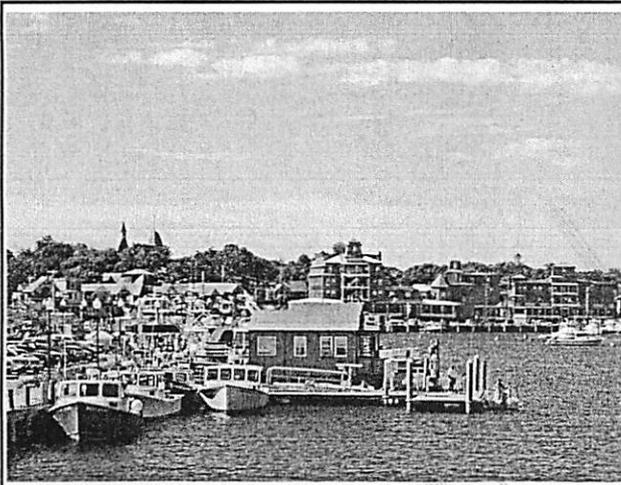
	JUL	AUG	SEP	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	YTD
MV Excise	\$ 36,487	\$ 39,946	\$ 20,286	\$ 19,848	\$ 7,720	\$ 17,235	\$ 21,684	\$ 442,964	\$ 101,462	\$ 76,803	\$ 20,899	\$ 84,689	\$ 890,023
Other Excise	\$ 1,863	\$ 387	\$ 406,361	\$ 496	\$ 2,791	\$ 352,652	\$ 1,479	\$ 1,050	\$ 48,018	\$ 195	\$ 644	\$ 62,471	\$ 878,408
Penalties and Interest	\$ 23,594	\$ 14,955	\$ 22,040	\$ 16,004	\$ 17,015	\$ 14,325	\$ 36,799	\$ 30,298	\$ 25,097	\$ 14,434	\$ 24,643	\$ 33,634	\$ 272,838
Payments in Lieu of Taxes	\$ 832	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,536	\$ 832	\$ 16,201
Charges for Services-Trash	\$ 32,645	\$ 34,550	\$ 17,325	\$ 12,375	\$ 14,495	\$ 8,530	\$ 8,390	\$ 1,810	\$ 13,760	\$ 9,890	\$ 15,365	\$ 36,220	\$ 205,355
Fees	\$ 7,140	\$ 9,869	\$ 9,692	\$ 10,569	\$ 8,108	\$ 12,701	\$ 8,713	\$ 10,739	\$ 12,290	\$ 14,589	\$ 12,250	\$ 9,776	\$ 126,436
Rentals	\$ 9,175	\$ 12,475	\$ 3,500	\$ 2,500	\$ 256	\$ 2,750	\$ 1,750	\$ 250	\$ 5,500	\$ 1,500	\$ 5,750	\$ 9,151	\$ 54,557
Dept. Revenue-School	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Dept. Revenue-Library	\$ 1,467	\$ 1,652	\$ 1,379	\$ 422	\$ 1,327	\$ 762	\$ 449	\$ 665	\$ 614	\$ 778	\$ 347	\$ 1,362	\$ 11,223
Other Dept. Revenue	\$ 15,710	\$ 10,205	\$ 12,601	\$ 21,406	\$ 19,388	\$ 3,922	\$ 5,374	\$ 3,316	\$ 15,038	\$ 158,181	\$ 9,034	\$ (70,797)	\$ 203,377
Licenses and Permits	\$ 23,215	\$ 33,037	\$ 26,155	\$ 26,270	\$ 23,517	\$ 30,452	\$ 72,039	\$ 25,624	\$ 94,551	\$ 29,420	\$ 31,321	\$ 51,396	\$ 466,996
Fines and Forfeits	\$ -	\$ -	\$ 5,258	\$ 1,525	\$ 1,550	\$ 1,310	\$ 638	\$ 1,015	\$ 1,668	\$ 1,133	\$ 2,190	\$ 3,008	\$ 19,293
Investment Income	\$ 1,525	\$ 1,843	\$ 1,147	\$ 967	\$ 1,203	\$ 1,079	\$ 1,127	\$ 1,374	\$ 1,555	\$ 1,397	\$ 1,884	\$ 1,629	\$ 16,730
Other Miscellaneous-Recurring	\$ 307,449	\$ 219,668	\$ 118,738	\$ 5,369	\$ (1,348)	\$ (7,375)	\$ 2,355	\$ 51,432	\$ 20,510	\$ 7,937	\$ 101,917	\$ 115,453	\$ 942,106
Miscellaneous-Non Recurring	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ 461,102	\$ 378,587	\$ 644,482	\$ 117,751	\$ 96,022	\$ 438,343	\$ 160,796	\$ 570,536	\$ 340,064	\$ 316,256	\$ 240,780	\$ 338,823	\$ 4,103,542
Cummulative Monthly Totals	\$ 461,102	\$ 839,689	\$ 1,484,171	\$ 1,601,922	\$ 1,697,944	\$ 2,136,287	\$ 2,297,083	\$ 2,867,619	\$ 3,207,682	\$ 3,523,939	\$ 3,764,718	\$ 4,103,542	

IIIB ESTIMATED RECEIPTS LOCAL

	FY13	FY14	FY15	FY16	FY17	FY18	LAST 3 YR AVG	(TE FORMULA EACH YR)
MV Excise	\$626,779	\$ 684,485	\$ 723,005	\$ 867,825	\$ 890,023	\$ 907,648	\$ 888,498.47	
Other Excise	\$684,614	\$ 667,682	\$ 716,108	\$ 809,481	\$ 878,408	\$ 978,647	\$ 888,845.46	
Penalties and Interest	\$ 217,545	\$ 198,296	\$ 208,778	\$ 450,234	\$ 272,838	\$ 341,844	\$ 354,971.84	
Payments in Lieu of Taxes	\$ 11,405	\$ 10,143	\$ 13,839	\$ 13,438	\$ 16,201	\$ 14,339	\$ 14,659.37	
Charges for Services-Trash	\$227,230	\$ 222,605	\$ 213,500	\$ 214,935	\$ 205,355	\$ 196,330	\$ 205,540.13	
Fees	\$ 96,528	\$ 121,420	\$ 120,505	\$ 117,190	\$ 126,436	\$ 108,884	\$ 117,503.11	
Rentals	\$ 93,450	\$ 85,344	\$ 112,220	\$ 55,106	\$ 54,557	\$ 76,002	\$ 61,888.17	
Dept. Revenue-School	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
Dept. Revenue-Library	\$ 14,543	\$ 12,213	\$ 7,735	\$ 9,927	\$ 11,223	\$ 9,658	\$ 10,269.47	
Other Dept. Revenue	\$ 246,010	\$ 193,140	\$ 201,940	\$ 464,577	\$ 203,377	\$ 239,423	\$ 302,459.00	
Licenses and Permits	\$ 306,094	\$ 340,232	\$ 348,714	\$ 352,315	\$ 466,996	\$ 428,789	\$ 416,033.41	
Fines and Forfeits	\$ 29,629	\$ 28,530	\$ 21,633	\$ 16,468	\$ 19,293	\$ 24,018	\$ 19,926.25	
Investment Income	\$ 7,082	\$ 12,523	\$ 17,625	\$ 15,976	\$ 16,730	\$ 15,436	\$ 16,047.38	
Other Miscellaneous-Recurring	\$900,617	\$ 906,252	\$ 961,345	\$ 1,032,477	\$ 942,106	\$ 1,029,438	\$ 1,001,340.39	
Miscellaneous-Non Recurring	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
<b>Total</b>	<b>\$ 3,461,525</b>	<b>\$ 3,482,867</b>	<b>\$ 3,666,946</b>	<b>\$ 4,419,949</b>	<b>\$ 4,103,542</b>	<b>\$ 4,370,457</b>	<b>\$ 4,297,982.45</b>	

	<u>Total</u>	<u>FY 2016</u>	<u>FY 2017</u>	<u>FY 2017 Gen. Fund</u>	<u>FY 2017 WW Fund</u>	<u>FY 2017 CPA Fund</u>	<u>VAR.</u>
II. Amounts to be raised							
Ila. Appropriations	30,957,218.26	67,500.00	30,889,718.26	28,289,582.26	837,347.00	1,762,789.00	-
Iib Other amounts to be raised							
1. Amounts certified for tax title purposes							-
2. Debt and interest charges not included on page 4							-
3. Final court judgements							-
4. Total overlay deficits of prior years							-
5. Total cherry st	185,045.00		185,045.00	185,045.00			-
6. Revenue deficits							-
7. Offset receipt deficits							-
8. CPA other una	1.00		1.00			1.00	-
9. Snow and Ice deficit							-
10. Other							-
Total Iib	185,046.00	-	185,046.00	185,045.00	-	1.00	-
Iic. State and county cherry sheet	1,074,471.00		1,074,471.00	1,074,471.00			-
Iid. Allowance for abatements and	150,000.00		150,000.00	150,000.00			-

	lie. Total amount to be raised	32,366,735.26	67,500.00	32,299,235.26	29,699,098.26	837,347.00	1,762,790.00	-
III.	Estimated receipts and other revenue sources							-
	IIIa. Estimated receipts - state							-
	1. Cherry sheet e	1,405,140.00		1,405,140.00	1,405,140.00			-
	2. MSBA payments			-				-
	Total IIIa	1,405,140.00	-	1,405,140.00	1,405,140.00	-	-	-
	IIIb. Estimated receipts - local							-
	1. Local receipts	3,685,500.00		3,685,500.00	3,685,500.00			-
	2. Offset Receipts			-				-
	3. Enterprise fur	1,567,667.00		1,567,667.00		1,567,667.00		-
	4. CPA	1,762,790.00		1,762,790.00			1,762,790.00	-
	Total IIIb	7,015,957.00	-	7,015,957.00	3,685,500.00	1,567,667.00	1,762,790.00	-
	IIIc. Revenue sources appropriated for particular purpose							-
	1. Free cash	309,833.00	67,500.00	242,333.00	242,333.00			-
	2. Other Availabl	675,284.00		675,284.00	675,284.00			-
	Total IIIc	985,117.00	67,500.00	917,617.00	917,617.00	-	-	-
	IIId. Other revenue sources appropriated specifically to reduce the tax rate							-
	1a. Free Cash			-				-
	1b. Free Cash			-				-
	2. Municipal Light Source			-				-
	3. Other source: EF indirects costs transfer			-	730,320.00	(730,320.00)		-
	Total IIId	-	-	-	730,320.00	(730,320.00)	-	-
	IIIe. Total estimated receipts and c	9,406,214.00	67,500.00	9,338,714.00	6,738,577.00	837,347.00	1,762,790.00	-
IV.	Summary of total amount to be raised and total receipts from all sources							-
	a. Total amount	32,366,735.26	67,500.00	32,299,235.26	29,699,098.26	837,347.00	1,762,790.00	-
	b. Total estimate	9,406,214.00	67,500.00	9,338,714.00	6,738,577.00	837,347.00	1,762,790.00	-
	c. Total real and	22,960,521.26	-	22,960,521.26	22,960,521.26	-	-	-
	d. Total receipts	32,366,735.26	67,500.00	32,299,235.26	29,699,098.26	837,347.00	1,762,790.00	-
	Variance	-	-	-	-	-	-	-



**TOWN OF OAK BLUFFS,  
MASSACHUSETTS**

**ANNUAL BUDGET FOR FISCAL YEAR 2019**

**BEGINNING JULY 1, 2018  
ENDING JUNE 30, 2019**

TOWN OF OAK BLUFFS, MASSACHUSETTS  
FISCAL YEAR 2019 ANNUAL BUDGET

TABLE OF CONTENTS

A Readers Guide to the Annual Budget Document

SECTION

Page #s

**1. INTRODUCTION**

- 1) Community Profile, Form of Government & Demographics
- 2) Town Organizational Chart
- 3) Boards, Committees and Elected Officials
- 4) Guide to the Budget Process
- 5) Town Administrator Letter on Budget Recommendations

**2. BUDGET SUMMARIES**

- 1) Balanced Budget Summary
- 2) Revenue Budget Summaries
- 3) Expenditure Budget Summaries
- 4) Personnel Summary

**3. DEPARTMENTAL BUDGETS**

- 1) Town Administration
- 2) General Government
- 3) Community Services
- 4) Recreation & Natural Resources
- 5) Public Safety
- 6) Education
- 7) Public Works
- 8) Waste Water
- 9) Debt
- 10) Unallocated Expenses

**4. COMMUNITY PRESERVATION FUND**

**5. CAPITAL IMPROVEMENT PLAN – 2017-2022**

*Supplemental & Capital Budgets*  
1) Supplemental & Capital Budgets  
2)

**6. APPENDICES**

- 1) Summary of Fund Balances & Descriptions
  - i. Report on activity of Town Special Revenue Funds
  - ii. Changes in General Fund Balances, excerpted from Town Audited Financial Statements
- 2) Glossary of Financial & Budget Terms

3) FY19 Annual Town Meeting Warrant.

**COMMUNITY PROFILE, FORM OF GOVERNMENT &  
DEMOGRAPHICS**



# TOWN OF OAK BLUFFS, MASSACHUSETTS

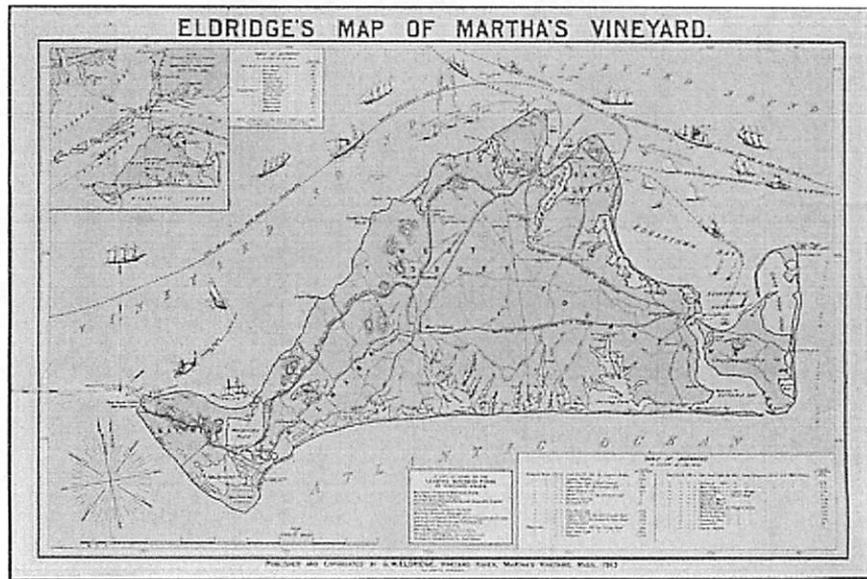
## COMMUNITY PROFILE, FORM OF GOVERNMENT & DEMOGRAPHICS

### COMMUNITY PROFILE

The Town of Oak Bluffs is a residential, resort community located on the northeast shore of the island of Martha's Vineyard. Originally incorporated in 1880 as Cottage City, in 1907 the town's name was changed because of the growth in the year round population and the changing face of the resort required an acknowledgment the Town was not just "Cottage City" any more.

Martha's Vineyard is a 100 square mile island located three miles off the coast of Cape Cod. Formed by the southern most advance, or terminal moraine, of the North American ice sheet during the last ice age over 10,000 years ago. Today, year-round residents, seasonal residents and hundreds of thousands of short-term visitors live on or come to the island, attracted by the unique natural, ecological, historical, cultural and scientific values that define the beauty and character of Martha's Vineyard.

Approximately three quarters of the island's population is concentrated in the three "Down-Island" towns of Tisbury, Oak Bluff's and Edgartown, each with their own unique commercial town centers. Vineyard Haven in Tisbury serves as the islands main port and is supplemented by a port in Oak Bluffs in the summer time. The three "Up-Island" towns of West Tisbury, Chilmark, and Aquinnah are more rural in character.



Covering approximately 7.37 square miles, Oak Bluffs is located in the County of Dukes County. The Town is bordered by the Town of Edgartown on the south, the Town of Tisbury on the west and Nantucket Sound on the north and east. Today, Oak Bluffs is home to the largest marina on Martha's Vineyard, a bustling seasonal waterfront and downtown, and the historic gingerbread campgrounds. Oak Bluff's hosts several beautiful beaches and public parks; a teeming shore of wildlife, fish and shellfish; a golf course and a number of civic amenities that make the community a great place to live, work and play.

# **TOWN OF OAK BLUFFS, MASSACHUSETTS**

## **COMMUNITY PROFILE, FORM OF GOVERNMENT & DEMOGRAPHICS**

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### **FORM OF GOVERNMENT**

Oak Bluffs is governed by an Open Town Meeting form of government, which makes all local legislative decisions. Town Meeting consists of all registered voters of the Town. During the Annual Town Meeting, all registered voters may vote for or against articles presented on the Town warrant. The affairs of the Town are generally administered by a board of five selectmen, elected for staggered three-year terms on an at-large basis who appoint and are assisted by a Town Administrator. The voters of the Town elect, and the Board of Selectmen appoint, citizens to fill positions on various committees, or to represent the Town on other entities, that are vital to the operation of the town.

Responsibility for the educational needs of the children of Oak Bluffs rests with the elected School Committee. Day-to-day operational responsibilities are delegated to the Superintendent of Schools.

Oak Bluffs provides general governmental services, which include police and fire protection, public education in grades pre-kindergarten through eight, curbside residential refuse and recycling services, streets, parks and recreation, and cemetery maintenance and operation. Waste water facilities and sewerage is provided by the Town through a wastewater Enterprise Fund.

The Town participates with several regional governments or special districts to deliver services. The Oak Bluffs Water District, a separate municipal entity, provides water infrastructure and services. The Martha's Vineyard Regional Transit Authority provides year-round transportation services. The Woods Hole, Martha's Vineyard and Nantucket Steamship Authority provides passenger, commercial and freight ferry service between the island and Woods Hole and Hyannis. The Martha's Vineyard Regional High School provides public education for grades nine through twelve. The Martha's Vineyard Commission is the regional planning agency for the Island. The County of Dukes County provides for space for courts, a jail and house of correction, the registry of deeds, the operation of an airport, as well as several regional service programs. Information, including budgetary information on each of these entities is publicly available via the internet, or by contacting each directly.

**TOWN OF OAK BLUFFS, MASSACHUSETTS  
COMMUNITY PROFILE, FORM OF GOVERNMENT & DEMOGRAPHICS**

**DEMOGRAPHICS (Selected Data)**

The value of all property (Real and Personal) of the Town, resulting property tax rates and impacts on the average Single Family Home (SFH) in Oak Bluffs, are below. The rank listed is where Oak Bluffs average SFH tax bill falls compared to the other 351 communities in the Commonwealth of Massachusetts.

Year	Total Property Value	Tax Rate	Single Family Parcels	Avg. SFH Home Value	Avg. SFH Tax Bill	Rank
2018	3,038,298,360	7.83	3,357	678,268	5,311	144
2017	2,837,913,460	8.15	3,340	631,930	5,150	141
2016	2,671,835,130	8.11	3,331	596,786	4,840	149
2015	2,550,305,440	7.96	3,323	569,299	4,532	160
2014	2,522,434,290	7.81	3,310	566,947	4,428	154

Population, employment and income data is presented to indicate the demographics served, and to provide a measure of our citizens ability to pay for the taxes and fees indicated in our budget. To some extent, this data also provides indicators on factors that have may have a significant impact on Town budgets, i.e. school enrollment and collective bargaining obligations.

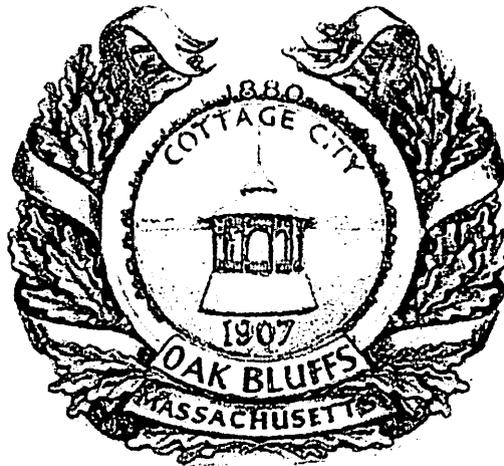
Year	Population	School Enrollment	Labor Force	Unemployment Rate
2018	4,655	645		
2017	4,655	648	2,358	5.5%
2016	4,655	652	2,539	5.0%
2015	4,655	618	2,545	6.3%
2014	4,655	597	2,534	7.7%
2010	4,527	Population census data – subsequent years are estimated.		
2000	3,713			
1990	2,804			

In addition to the Town of Oak Bluffs, the Town's largest employers include Martha's Vineyard Regional Hospital and YMCA Community Service employing approximately 200 and 110 employees, respectively. These employers are supplemented by approximately 249 establishments representing construction, professional, service, leisure, retail and other businesses. The average annual wage per the Massachusetts Executive Office of Labor & Workforce Development was \$88,051. Per U.S. Department of Commerce, median income was \$96,714 and per capita income was \$36,789. All data using 2016-5 year estimates.

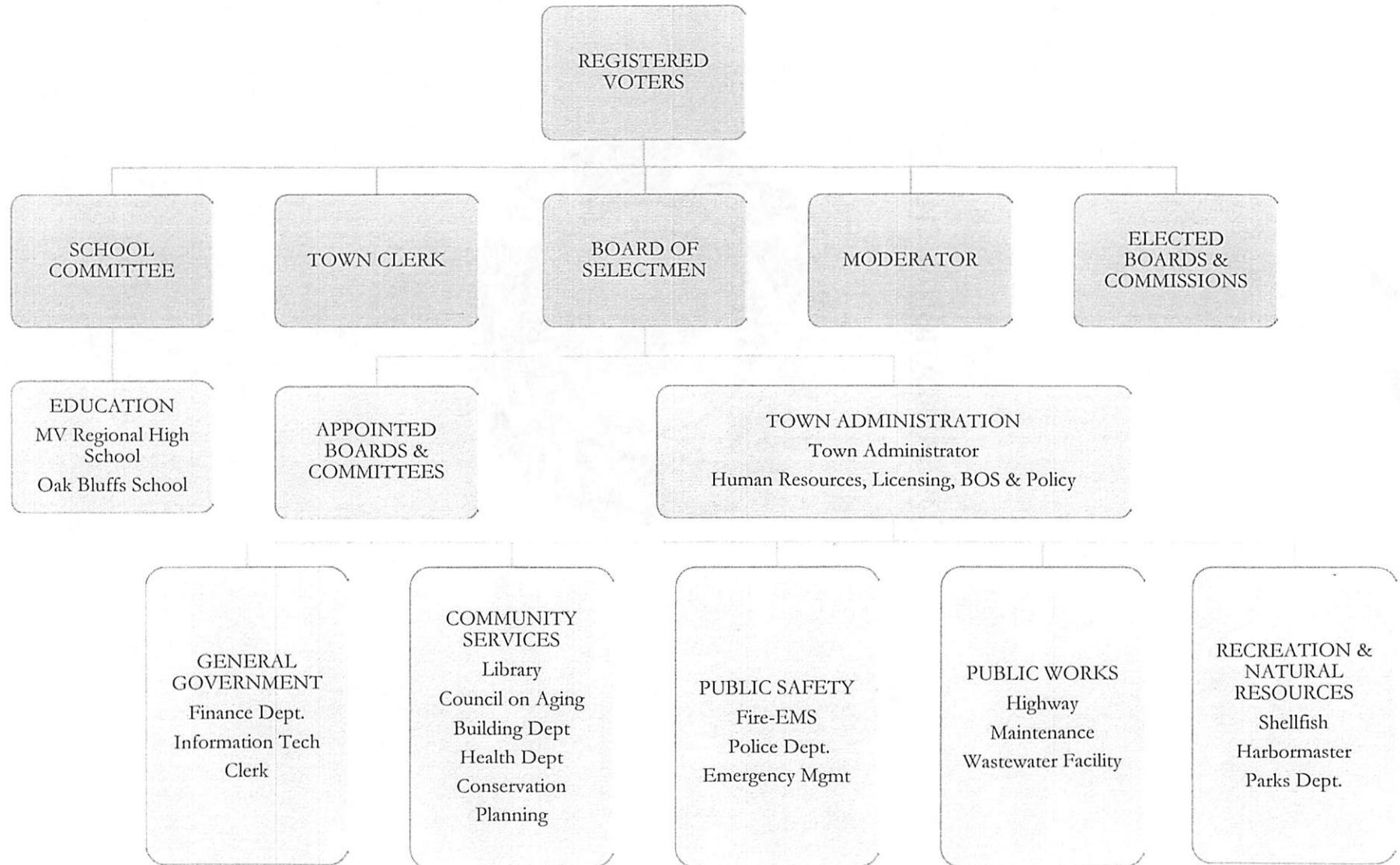
The Town has approximately 220 full-time, part-time, and seasonal employees, of which approximately 54% belong to collective bargaining groups, as follows:

Union	Department	Approximate Members	Contract Expiration
AFSCME	General Government	25	6/30/2018
MCOPS	Police	16	6/30/2018
MV Teachers & Educators Assoc.	Schools - Custodians & Secretaries	12	6/30/2018
MV Educators Assoc	Schools – Teachers & Aides	24	6/30/2018

ORGANIZATIONAL CHART



# Town of Oak Bluffs Organization Chart



**BOARDS, COMMITTEES, & ELECTED OFFICIALS**



## TOWN OF OAK BLUFFS, MASSACHUSETTS

### BOARDS, COMMITTEES, AND ELECTED OFFICIALS

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Through service on a government board, committee, or elected position, individuals have a great opportunity to learn about the working of local government and to have a positive impact on the Town of Oak Bluffs' present and future. Effective town government requires active and informed citizen participation and Oak Bluffs relies on its boards and committees for much of the Town's business and support in areas such as advisory, regulatory, investigative, and planning functions.

#### Elected Boards & Positions

- Board of Selectmen
- Town Moderator
- Town Clerk
- Board of Health
- Park Commissioners
- Cemetery Commissioners
- School Committee
- Finance and Advisory Committee
- Planning Board
- Wastewater Commission
- Martha's Vineyard Land Bank Commission
- Constables
- Tree Warden

#### Board of Selectmen

##### Department Appointments

- Town Administrator
- Building Commissioner
- Fire Chief
- Harbormaster
- Police Chief
- Shellfish Constable
- Treasurer/Collector
- Town Accountant
- Town Counsel
- Veteran's Agent

#### Board of Selectmen

##### Ad Hoc Committee Appointments

- Bikeway Study Committee
- Town Hall Building Committee

#### Board of Selectmen Appointed Boards & Positions

- Affordable Housing Committee
- Board of Assessors
- Board of Registrars
- Capital Program Committee
- Community Preservation Act Commission
- Conservation Commission
- Copeland Plan District Review Board
- Cottage City Historical District Commission
- Council on Aging
- Harbor Advisory Committee
- Herring Run Committee
- Historical Committee
- Library Board of Trustees
- Oak Bluffs Housing Trust
- Personnel Board
- Planning Board
- Roads and Byways Committee
- Shellfish Committee
- Sign Review Committee
- Cape and Vineyard Electric Co-op Representative
- County Advisory Board Representative
- Joint Transportation Committee Representative
- Martha's Vineyard Commission Representative
- Martha's Vineyard Cultural Council Representative
- Martha's Vineyard Land Bank Advisory Committee Representative
- Martha's Vineyard Regional Transit Authority Representative
- Martha's Vineyard Steamship Authority Port Council Representative
- Zoning Board of Appeals Cape Light Compact Representative
- Fire Inspectors
- Gas Inspectors
- Inspector of Wiring
- Plumbing Inspector

**GUIDE TO THE BUDGET PROCESS**



## TOWN OF OAK BLUFFS, MASSACHUSETTS

### GUIDE TO THE BUDGET PROCESS

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The Town of Oak Bluffs operates on a fiscal year period of July 1<sup>st</sup> to June 30<sup>th</sup> each year. The process of preparing the annual budget takes place over a period of 7 months each year. Below is a table of the major events that help shape the budget:

<b>November</b>	<ul style="list-style-type: none"> <li>• Operating &amp; capital department budgets requested</li> </ul>
<b>December &amp; January</b>	<ul style="list-style-type: none"> <li>• Department budgets reviewed by Town Administrator</li> <li>• Budget review meetings held by Town Administrator with departments; Finance Committee</li> <li>• Town Administrator and Finance Team evaluate project requests from the department for the capital budget</li> <li>• Debt schedules and financial forecasts are updated to provide context to capital budget and the five year capital improvement plan.</li> </ul>
<b>January - February</b>	<ul style="list-style-type: none"> <li>• Town Administrator and School Superintendent recommend budgets</li> <li>• Operating budgets are posted and distributed</li> <li>• Capital budget is finalized</li> </ul>
<b>February</b>	<ul style="list-style-type: none"> <li>• Selectmen, School Committee, and Finance Committee review budgets</li> <li>• Proposed capital budget is presented to the Board of Selectmen</li> </ul>
<b>March – April</b>	<ul style="list-style-type: none"> <li>• Town Meeting Warrant approved by the Selectmen</li> <li>• Budget, Warrant &amp; Annual Town Reports are prepared, posted and distributed</li> <li>• Budget completed and voted by the Finance Committee, School Committee and Board of Selectmen</li> </ul>
<b>April</b>	<ul style="list-style-type: none"> <li>• Annual and Special Town Meetings are held</li> <li>• Operating and capital budgets are presented to Town Meeting for discussion, review, modification and approval.</li> </ul>

**November** – Departments are provided with their previously submitted five year capital request for review, update and the addition of the next fifth year. While requests generally remain the same as in the initial request, there are occasionally changed circumstances which necessitate alterations to the requests. This information is returned to the Town Administrator.

**December/January** – Departmental operating budgets are submitted to the Town Administrator. Meetings are held between the Town Administrator, the Finance Team and Department Heads to discuss the details of the operating budget requests.

The Town Administrator and Finance Team receive the compiled information and begin scheduling meetings with the various Department Heads to evaluate the projects for the Capital Budget. The preliminary debt schedules are updated and various financial forecasts are completed in order to provide context to the Capital Budget as well as the five year capital improvement program.

**January/February** – The School Superintendent presents his recommended operating budget to the School Committee; The Town Administrator presents his recommended operating budget and financing plan for departmental budgets, including the Schools, to the Board of Selectmen. Weekly meetings of the Finance Committee commence to review each department's budget and continue until Town Meeting. These meetings are all open to the public.

## **TOWN OF OAK BLUFFS, MASSACHUSETTS GUIDE TO THE BUDGET PROCESS**

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**January/February** – The Capital Budget is finalized within the parameters of the established funding target. In making final decisions, the process includes a determination of actual needs and the prioritization of need based upon legal mandate, public safety, and the effect of deferral. Any projects not approved for funding are typically deferred into the next budget year. In February, the proposed capital budget is presented to the Board of Selectmen.

**February-March** – The Finance Committee meets with Department Heads to review their capital requests and conducts site visits to view buildings, land or equipment, as needed.

**March** – By the end of March, the Finance Committee and School are ready to vote on the operating budget they will recommend to Town Meeting.

**March/April** – The Board of Selectmen votes on the items they will recommend to Town Meeting for approval including a vote to approve the “warrant” or agenda of all items to be considered for approval by Town Meeting. This includes the annual operating budget, capital spending requests, Community Preservation Act (CPA) spending requests, and any general bylaw, zoning bylaw changes, or other matters to be considered.

**Annual Town Meeting** – Oak Bluff’s Annual Town Meeting is held on the second Tuesday in April of each year in accordance with Town By-laws. Town Meeting is an Open Town Meeting comprised of all registered voters and is the legislative body of the town. Town Meeting approves all expenditures, operating and capital budgets, and bylaw changes. Approval of most spending requires a simple majority vote in favor, but capital projects, if they involve borrowing, must be approved by a two-thirds majority. The Town Meeting is presided over by the Moderator, who is elected by the voters of Oak Bluff’s and is responsible for the conduct of Town Meeting, according to Town bylaws and Chapter 39, section 15 of the Massachusetts General Laws. Amendments to appropriations require Town Meeting approval at either a regular Annual Town Meeting, or a Special Town Meeting.

**Property Taxes and Levy Limits** – in Oak Bluff’s, the vast majority of expenditures are funded through local property taxes. The calculation and limitation of raising of property taxes is significantly governed by the passage of a law in 1980 known as “Proposition 2 ½.” These provisions provide a communities voters a greater say in approving property tax increases. With inflation and certain costs routinely pushing the cost of government beyond 2 ½ % property tax increases, this law provides voters the ability to consider and determine what kind of community they want and can afford. A general override to Proposition 2 ½ supports the operating budget and allows property taxes to increase greater than 2 ½ %, but requires a majority vote by ballot at the Town Election to pass. Town leaders are mindful of the property tax burden and do everything possible to avoid or limit general overrides while maintaining essential services.

## TOWN OF OAK BLUFFS, MASSACHUSETTS GUIDE TO THE BUDGET PROCESS

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There are two components to the Proposition 2 ½ law:

1. A levy ceiling, or the maximum levy limit, is 2.5% of the full and fair cash value of taxable real and personal property, as determined by the Town's Assessors. Property values, individually, and in total, change as property are added or removed from the tax roll and as market values change, but Oak Bluff's Annual Tax Levy cannot exceed the Levy Ceiling.
2. The levy limit for a particular year is calculated by increasing the previous year's limit by 2.5% and adding or providing for new growth in the tax base, and overrides. The new limit cannot exceed the levy ceiling.

**The Levy Limit = Prior Year Levy Limit + 2.5% + New Growth +  
Voter approved overrides**

**Annual Tax Levy = Levy Limit + Exclusions**

**These limits cannot exceed the Levy Ceiling**

New Growth includes the additional property tax from new construction and addition to properties, exempt real property returned to the tax rolls, and new personal property. Typically, estimates of New Growth for the upcoming year are valued conservatively.

After these calculations, the result becomes the base for calculating the levy limit for the next year. The Town's actual tax levy can be any amount up to the limit. If in one year, the levy is below the limit, the levy increase in the following year could not exceed 2.5%. The difference between the actual levy and the levy limit is called "excess levy capacity."

Levy Exclusions – Taxpayers may vote to fund debt for projects and choose to exclude these debt payments from the calculation of the levy limit, and therefore keep this taxing ability free for other uses. Unlike an override, these exclusions (either debt or capital exclusions) are temporary increases to the tax levy, allowing additional property taxes to be raised to pay for the debt service of the project – but only during the life of the debt, or the duration of the capital project. At conclusion of the debt service, or project, the ability to raise these additional property taxes disappears and reverts to the general calculation of levy limits. Exclusions require a majority vote of town taxpayers via a ballot vote at a town election. The Town has approved a number of debt exclusions which expire on various dates in the future.

Community Preservation Act (CPA) Surcharge – Votes approved the adoption of the State's Community Preservation Act (MGL Chapter 44B), which authorizes the Town to charge 3% (after \$100,000 assessment exemption) on top of the regular tax levy. This money is matched, in part, by the State for the purpose of enabling cities and towns to fund the acquisition and preservation of open space, the creation and support of affordable housing, and the acquisition and preservation of historic buildings and landscapes. The adoption of the CPA reflects the value our citizens place on these issues and has enabled the town to maintain the character, recreational uses and mix of housing that has defined the town. The Community Preservation Committee is charged with studying the needs, possibilities, and resources of the Town regarding community preservation and with making recommendations to Town Meeting regarding the appropriation of CPA funds.

**TOWN ADMINISTRATOR'S BUDGET RECOMMENDATIONS**





# TOWN OF OAK BLUFFS

Post Office Box 1327 • Oak Bluffs, MA 02557  
Telephone 508-693-3554 • Fax 508-696-7736

## Board of Selectmen

Kathleen A. Burton, *Chairman*  
Gail M. Barmakian  
Gregory A. Coogan  
Brian C. Packish  
Michael J. Santoro

January 4, 2018

TO: Kathy Burton, Chairman and Members  
of the Board of Selectmen

FROM: Robert L. Whritenour, Jr., Town Administrator

RE: Budget Recommendations for Fiscal Year 2019

Robert L. Whritenour, Jr.  
*Town Administrator*

### Executive Summary

I hereby submit for your review my budget recommendations for fiscal year 2019, along with a detailed analysis of available revenues, including a breakdown of revenue budget trends for the previous six-year period. For a better frame of reference in analyzing revenue trends, I have also included graphics using twelve years of historical data for each major revenue category. This is helpful in gaining better insight to the true historical trends. In submitting the budget, I want to thank all of our Town Department Heads for their continued hard work and patience as they complete the detailed analysis required in presenting and defending their budget requests. There are not sufficient funds to meet all Departmental needs, and it is difficult at times for Departments to manage around this. I also want to single out two emerging Town leaders, our Assistant Town Administrator, Wendy Brough, and Town Accountant, Deborah Potter, whose tremendous help proved invaluable in analyzing and presenting a budget strategy in this difficult year.

In previous fiscal years I have pointed to the Town's newly gained solid financial footing as predicated upon our ability to control costs and to limit spending to level within our ability to raise funds under the constraints of Proposition 2 ½. Through the adoption of conservative budgeting strategies and the hard work and cooperation from all of our Departments, the Town in most years has been successful in controlling the growth of the budget to keep it within our 2 ½ levy limit. Every several years the growth in costs of our overhead items as well as with our regional partners creates increases that the Town cannot absorb within Proposition 2 ½. This last occurred in Fiscal Year 2015, and is once again happening in Fiscal year 2019.

For fiscal year 2019, several critical areas of the budget are combining to create increases in spending which are in excess of funds available under Proposition 2 ½. These areas include contracted wage settlements, health insurance, the regional high school, Oak Bluffs School and the retirement system. The chart below details these cost increases:

<b>Fiscal Year 2019 Projected Budget Increases</b>	
Cost of Living - Town	\$147,112.72
Health Insurance-Town and School @12%	\$346,480.00
Regional High School	\$467,566.14
Oak Bluffs School	\$302,431.80
Retirement	\$52,093.00
<b>Total</b>	<b>\$1,315,683.66</b>

Our new revenues total just under \$800,000, which creates a substantial shortfall in available revenues to support the Fiscal Year 2019 budget in dealing with these few items alone. In reviewing and recommending the budget I have made every attempt to limit Departmental spending where possible to lower this shortfall to a manageable amount. It should be pointed out that Departmental budget requests came in with an increase that is double what is contained in the recommended budget, for a shortfall of approximately \$1,000,000. My budget recommendation builds on our conservative philosophy of limiting spending wherever possible so that we can afford what we truly need in the long run. As a result there are worthwhile requests in the budget that I have simply been forced to delay in order to keep spending down. The result is a budget that while increasing 4.5% contains only the required spending without decreasing the services levels that we have struggled to maintain. The budget will require a minimum Proposition 2 ½ override of \$500,000 to balance. My recommendation is for the adoption of a Proposition 2 ½ override of \$750,000 in order to balance the budget for fiscal year 2019 and to provide a small amount of additional revenue growth capacity to get us through Fiscal Year 2020 without an additional override.

The overall fiscal year 2019 annual budget is presented at the recommended spending level of \$30,659,266, which, as stated, is up 4.5% over the previous year's budget of \$29,338,060, as fueled by increases in a small number of large overhead line items. Factoring in health insurance costs, seventy-one percent of the growth in annual spending is devoted to educational spending for the Regional High School and the Oak Bluffs School. Spending on other Departments has been limited primarily to approved salary agreements and maintains our current staffing levels. Very little room has been left for new initiatives.

The very small initiatives contained in the budget include expanding the hours for early voting in the Registrar's budget, providing for an expansion of the Adult Day Care program funded through the Council on Aging budget for the Center for Living, and increasing the Building Maintenance Budget to include better cleaning and maintenance of Town buildings. The budget also includes the establishment of a Night Duty Officer

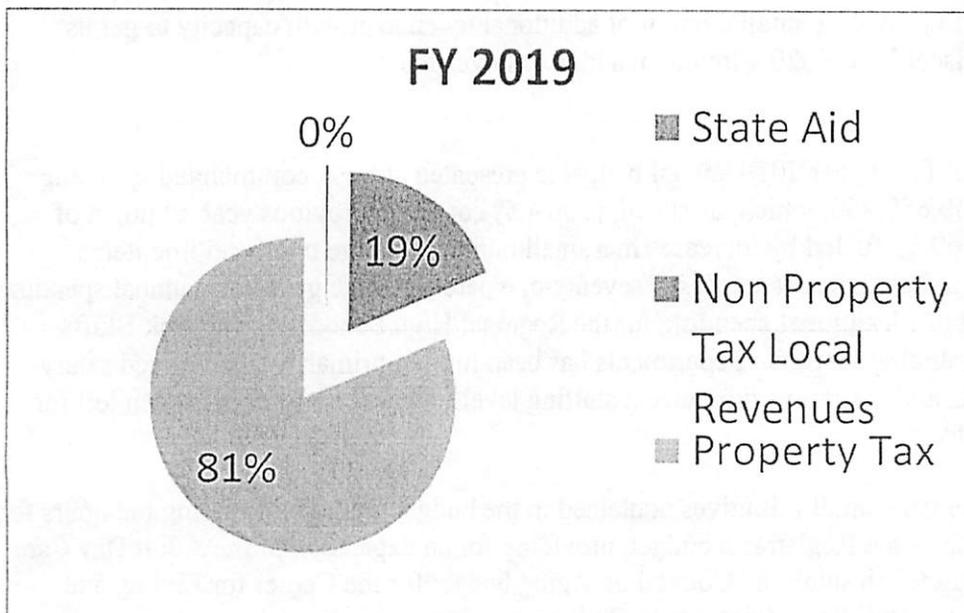
position in the Fire Department to offer some limited but very appropriate rotating compensation for volunteer Fire personnel who assume leadership responsibilities for nighttime shifts, as well as including a small increase for administrative staff support in the Department. Additionally \$20,000 has been set aside to assist in the implementation of the Town's updated wage and classification plan. Aside from these items, very little has changed in the Town budget.

### Budget Overview

#### Revenues

The Town's overall revenue base has become stable, and is quite predictable. As a small town, our revenue is slow-growing, with total growth in the coming year estimated at approximately 2.7% without an override, which should be no surprise given the large amount of property tax revenue that supports the Town. Property Taxes remain by far the largest contributor at 81 percent of the Town's total revenues, followed by our non-property tax revenues at 19 percent and State revenues of less than 1 percent of the total budget. This is the primary reason for limited revenue growth from year to year, as Proposition 2 ½ limits the growth of property taxes to 2 ½ percent each year plus any exclusions or taxes from new or improved structures. This is an important limiting factor which must be respected every year.

Included in the budget package is a multi-year analysis of revenues and expenditures that provides the basis for decisions on the overall budget. This six-year trending tool is very helpful not only in estimating revenues for the coming fiscal year, but also for tracking trends and conducting financial planning for the future.



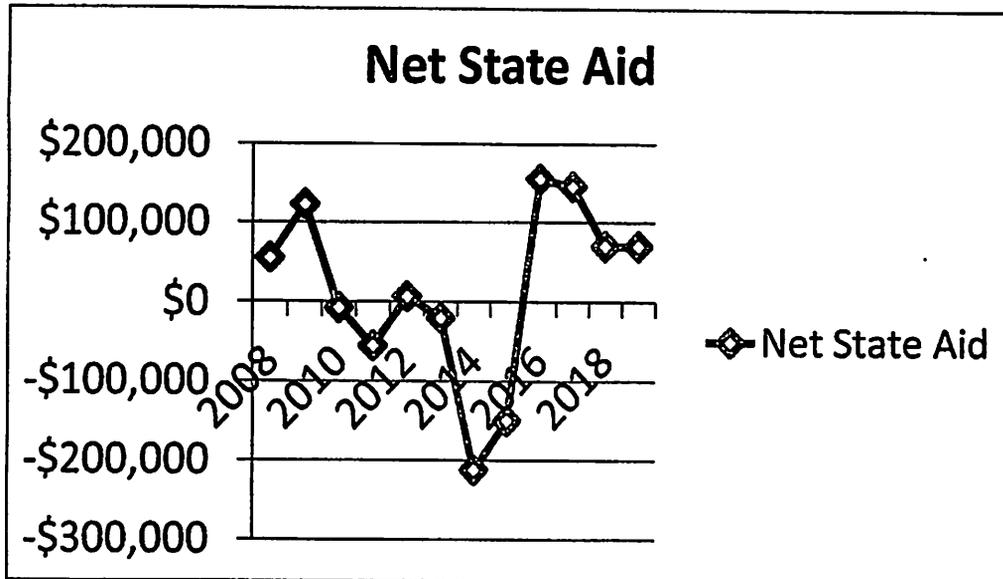
## State Aid

Net State Revenues declined again in Fiscal Year 2018 by nearly 50%, down to \$69,793 in State Aid available to support the budget at Town Meeting. My estimate is for little change to occur in the State's fiscal year 2019 budget, which will not be completed for another several months. This has historically been a major problem for our community, as we are mistakenly viewed by an inequitable and antiquated State formula as an affluent community based on property valuation alone. We are viewed by the State as an affluent community despite one of the lowest per capita incomes in our region. In fact we rank 315 in per capita income out of the 351 cities and towns in Massachusetts, so it is incredible that we are viewed so inaccurately. As a result of this flawed formula, our community has been largely overlooked for State Aid. A key factor in the calculation of available State Aid is the fact that State Aid is presented to the Town in the dual form of grants of aid and State charges. In order to calculate the State Aid available for the local budget, it is necessary to deduct the State charges from the grant of Aid to arrive at the State Aid available for appropriation. For the Town of Oak Bluffs, our current total granted State Aid is \$1,513,336. Of that Aid, \$230,755 is reserved for non-budgeted educational and library costs called "direct offsets", and our bill for State charges is \$1,212,788. This leaves a total of \$69,793 in Net State Aid which is available for appropriation at Town Meeting to support the annual operating budget.

At this point our Net State Aid is dangerously close to returning to the negative as it was in most years between FY 2010 and FY 2015. This would mean that the State charges are in excess of the State Aid we receive. This is highly unfair and the chief reason that I advocate for minimum levels of State Aid to each municipality to avoid such a scenario where State charges are in excess of State Aid.

It should be noted that similarly sized towns in other parts of the Commonwealth net roughly 25-35% of their total revenue base from State Aid. In this context it is clear that the basic inequity of the distribution formula for both our Chapter 70 Aid and the lottery distribution has historically hurt our community. This continues to be a major problem for our Town. These formulas are overly reliant on the property valuation of communities as a measure of wealth, and do not give enough attention to the income of local residents to support the properties they own. As a result, Oak Bluffs is considered affluent based on property values which are above average. This neglects the income level of our year-round population, and causes the Town to be overlooked in the distribution of State Aid. As in previous years, this remains a legislative issue which should be addressed for greater equity in the distribution of State Aid.

## State Revenues 2008-Present



### Non-Property Tax Local Receipts

The Non-Property Tax Local Receipts are largely fueled by the Local Estimated Receipts (LER), comprised of a laundry list of non-property tax local revenues which are tracked as a group. The LER are on a strong six-year trend of annual growth, in large part as a result of increases from the adoption of local option meals and hotel taxes as well as a rebounding local economy, which fuels other local receipts such as motor vehicle excise taxes and harbor fees. The growth in LER reached its highest point in FY 2016 when a backlog of tax title properties changed hands or were otherwise redeemed, which in addition to assisting in lowering tax title receivables, created a minor windfall for the Town in the collection of approximately \$450,000 in penalties and interest on the redeemed tax titles. Since that time the level of growth has slowed considerably, and it should be noted that the reduction of long-term outstanding taxes will in all likelihood continue to hold down the level of growth in LER over the next several years.

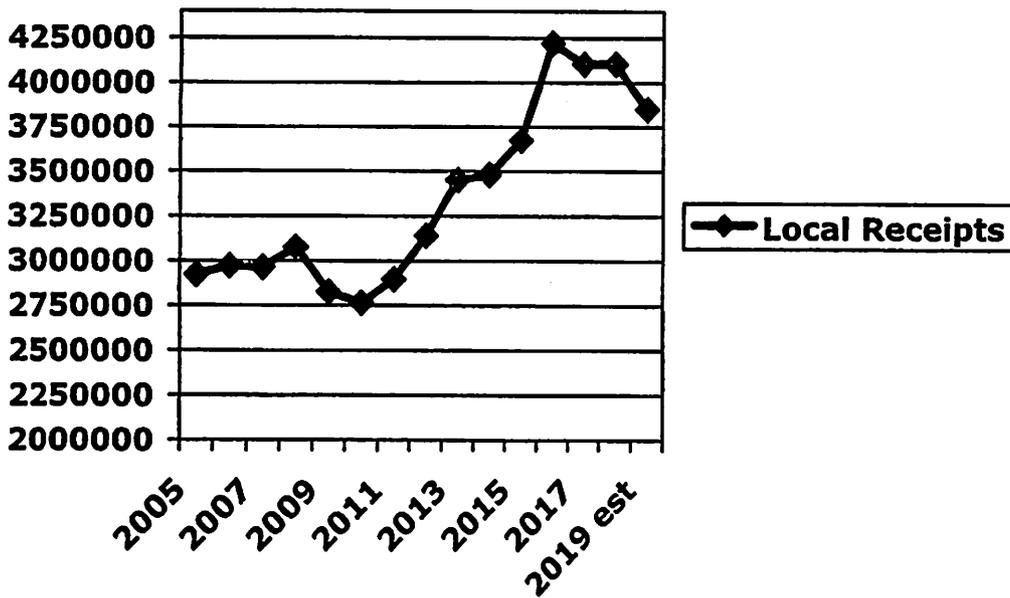
Our major challenge moving forward will be to recognize that the previous level of growth will not be there for the LER, so it is important to estimate this revenue based on the current low rate of growth. Moreover, estimates should be established at amounts the Town will comfortably collect. While there is no penalty for exceeding estimates,

failing to collect estimated receipts can have devastating impacts on the following year's operating budget by creating large deficits which must be met. As a result it is imperative to continue conservatively estimating local receipts in a way that limits current year estimates to approximately 90% of previous year collections. Amounts collected over estimates may be easily allocated in future years, but a deficit in collections carries a large penalty of budget disruption and poor financial performance.

Additional non-property tax local revenues include the "reserved receipts accounts" used for the budget. For fiscal year 2019 these include annual receipts of approximately \$198,000 in ferry embarkation fees of \$0.50 per passenger landing in Oak Bluffs. These fees are projected for appropriation to the Police Department Salary Account to help offset the additional public safety costs of the visiting ferry passengers. Also in the reserves receipt category are harbor fuel receipts of \$87,125 to pay for the debt service on the construction of the Harbor Fuel facility.

The Wastewater Enterprise fund is scheduled to contribute the sum of \$1,468,667 for Wastewater costs in the fiscal year 2018 budget including Wastewater departmental operations.

### ***Local Estimated Receipts 2005-2019***



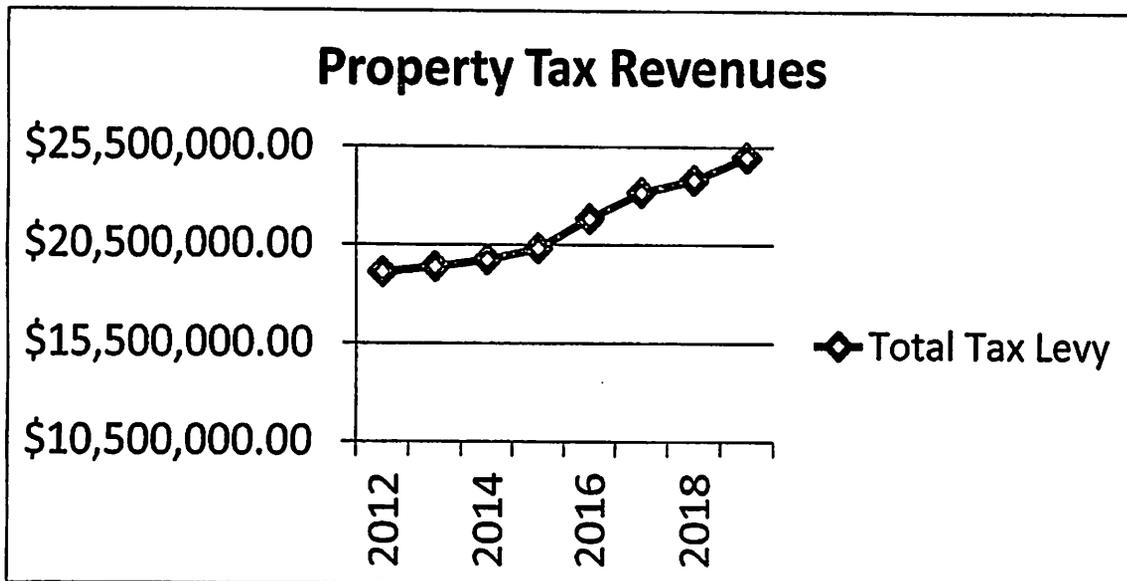
### Property Taxes

At 81 percent of all revenues, property taxes remain by far the largest source of Town revenues. With minimal State revenue sharing and non-tax revenues relatively

stable, it is guaranteed that property taxes will continue to fund this large share of Town's expenditures. For fiscal year 2019 property tax revenues are estimated to increase by the State-allowed 2 ½ percent of \$537,364 as well as the taxes on new or improved properties of \$218,326. In addition it is proposed that the Town raise an additional amount of \$500,000 from a \$750,000 Proposition 2 ½ override to offset the increases in the budget. During this year, total debt service which has been excluded from the provisions of Proposition 2 ½ will decline by \$134,620 from \$2,347,769 in fiscal year 2018 to \$2,213,149 in fiscal year 2019. This will help to reduce the impact on taxpayers of the override during Fiscal Year 2019 by 27% as the reduction in debt exclusions partially offsets the override.

The Town's tax base remains stable and strong heading into fiscal year 2019. Total property valuations are up from the previous year by nearly \$200 million, or 7%, to a total of just over \$3 billion. Following last year's 6.2% increase in value, that makes 13% growth in the overall value of the Town in just two years. 93.2% of taxable property is considered residential, and four of the five largest property taxpayers in the Town are residential in nature.

In 2003 the Town adopted quarterly tax billing, which has been successful in creating the seasonal cash flow needed to avoid borrowing in anticipation of revenue collection. With the exception of a \$5,000,000 temporary note on March 28, 2011, the Town has not been required to borrow in anticipation of revenues since the adoption of quarterly billing. The Town does not anticipate issuing any revenue notes for fiscal year 2019 or beyond.



## Expenditures

As stated in the Executive Summary, the Fiscal Year 2019 budget is dominated by growth in only five key categories of spending, which include the Oak Bluffs School, Regional High School, Cost of Living wage increases Health Insurance and Retirement. Aside from these increases, there are a very few small budget increases to address issues in other Departments.

### Educational Spending

#### Oak Bluffs School

We are in the third year of a major initiative at the Oak Bluffs School to increase classroom resources. Our local school system is growing, and the Town needs to make a concerted, long-term effort to provide the level of expenditures necessary to address our growing and changing student population. In fiscal year 2017, the Town granted the School Department a 4.27% increase which was primarily geared toward increasing the flexibility of the School system by reducing the amount of the direct offset State Aid “School Choice Funds” required to meet its core budget requirements. This provided the school with greater flexibility to use School Choice funds to meet emerging needs as the school year developed. In this way the School could react faster to changing needs and gained the ability to increase classroom resources as needed to address their most pressing concerns. For fiscal year 2018, the elementary school budget was granted an increase of 5.25% to help to fund increases in the Superintendent’s Shared Services budget, negotiated wage increases and additional positions necessitated by increasing enrollment. One new teaching position was added as a result of higher enrollment in the school, and a second teaching position was added as a result of the large number of new students who are English language learners.

For fiscal year 2019 I am recommending a 4% increase to fund negotiated salary increase as well as an additional new full-time teaching position to support enrollment growth at the middle school level. An additional full time special education assistant position is also added. This represents an increase in spending at the Oak Bluffs School of 13.5% over three years, This continued commitment to educational funding will greatly assist the School Department in dealing with the pressures of growth in enrollment, and it is anticipated that these growth pressures will continue for the foreseeable future.

#### Regional High School

For the past two years we have been able to fund additional resources for the Oak Bluffs School without overriding Proposition 2 ½ as a result of a favorable slowdown in Oak Bluffs enrollment at the high school level.

This renewed commitment to funding at the elementary school level has been made possible largely by the recent slowdown in the growth of enrollment at the High School level. Following the rapid growth in Oak Bluffs enrollment at the High School level from fiscal year 2015 through fiscal year 2016, which resulted in an approximately 25% increase in the Town's high school assessment over that two year period, our enrollment growth has declined. For fiscal year 2018, high school enrollment projections for Oak Bluffs were down by twelve students at the High School level. For fiscal year 2019, our projected enrollment is holding steady at 177 students, for no change from the previous year. However, the assessment is highly impacted not only by the Town's enrollment, but also by the enrollment trends of the five other communities. Next year, overall enrollment is estimated to decline by 14 students, pushing Oak Bluffs share of the Regional High School from 26.94% up to 27.53%.

To make matters worse, the Regional High School Budget has been voted to increase by 7.4 % this year, which seems excessive given the Proposition 2 ½ levy limit we live under. Add to that the increase in Oak Bluffs' share of the overall budget, and the total assessment to the Town of Oak Bluffs is increased by 10.1%, or \$467,566 from the previous fiscal year. This makes it virtually impossible to fund the Oak Bluffs budget for the coming year without an override.

This mathematical formulation as well as the inability of the Regional High School District to maintain budget increases to within the six Towns' Proposition 2 ½ levy limits will easily necessitate additional proposition 2 ½ overrides in the future as Oak Bluffs class sizes increase as compared to the other Towns.

### Cost of Living

Cost of living increases for fiscal year 2019 include a two percent (2%) COLA for year-round full and part-time positions with no steps, as is included in the union wage agreements approved last year. The Police Department wage settlement reflects a similar total increase with a one percent (1%) COLA and steps for several officers. The budget impact of the cost of living adjustments is \$147,112.72.

### Health Insurance

Health Insurance costs continue to rise and it is anticipated that rates will increase from existing rates by approximately 12% for the upcoming year. This funding is included in the Treasurer's fixed cost budget in the amount of an additional \$346,480 in funding from the previous year, for a total appropriation of \$3,056,480.16. These costs are divided between Town employees, School Employees and Retirees. Last year the Town adopted the new "high deductible" program which provides employees with a Town contribution each year to meet fifty percent of the higher deductible. This program lowers annual premium costs by approximately 15%. Although the employees who have opted for this program are finding the savings that were estimated, this program will take

several years to generate the number of optional sign-ups needed to have a major impact on the Town's total costs.

### Retirement

The Town is a member of the Dukes County Retirement system, which is governed by the Public Employee Contributory Retirement System of the Commonwealth of Massachusetts. This agency is mandated to establish member contributions based on a State actuarial analysis of member liability for the unfunded liability of the system which is on a schedule for full funding. The Town's retirement assessment is up approximately five percent for fiscal year 2019, to a total of \$1,093,943. This represents additional funding of \$52,093 from the current fiscal year

With these major highlighted increases, very little room is left in the budget for new initiatives. The small remaining increases are summarized below.

### Early Voting

Based on the success of last year's inaugural early voting program, the Commonwealth has extended the period for early voting by two weeks. This will require additional staffing hours at the polls by the Registrar's Department to accommodate the additional two weeks of voting. There is a minor cost increase associated with this that is included in the Registrar's budget.

### Center for Living Services: Adult Day Care

In recent years costs associated with this program have increased rapidly. As recently as fiscal year 2016, total Town costs for this program operated by the private Center for Living agency were approximately \$75,000. In fiscal year 2018 the Town's cost for this program was \$97,822. The Center for Living proposes an additional expansion of this program for fiscal year 2019, and the proposed annual cost for Oak Bluffs is \$122,831.43. This represents a 64% jump in the cost of this service over a three year period since fiscal year 2016. This amount is equivalent to the Town's entire Council on Aging budget for the year, and is devoted to very few Oak Bluffs residents. In addition to the cost of this program, there is an additional \$40,746.24 in the debt service budget to pay for the debt on the new building that was purchased by Dukes County for the Center for Living. This program should be followed closely to determine the appropriate level of Town contribution in the future.

### Building Maintenance

The Highway Department contains an additional \$25,000 in the Building Maintenance Budget to provide for the privatization of additional cleaning services for Town Buildings. The Town has historically struggled to maintain the cleanliness of its Town buildings due to staffing shortages. This budget provides funding to establish a

competitive procurement for cleaning services that will enable the Town to better clean our public buildings.

#### Fire Department Night Duty Officer

The fiscal year 2019 budget provides funding in the Fire Department for the establishment of a rotating Night Duty Officer Position. This funding will recognize and compensate those Fire Officers who are assigned as 'Officer in Charge' for the night watch in the event of a Fire call at night. This is the time of day when the Town is the most vulnerable, and it is imperative to have qualified officers assigned on-call night duty to guarantee a rapid response any time of day. It is necessary to assign these duties to the volunteer firefighter command staff on a rotating basis, and by having a modest stipend for this additional duty the Town is in a better position to ensure adequate coverage on a sustainable basis.

#### Wage and Classification Plan

During fiscal year 2018 the Town embarked on an update of its Wage and Classification Plan which was last updated ten years ago. The fiscal year 2019 budget contains an additional \$20,000 in seed money to assist in the implementation of the plan. Early results indicate the evolution of wages for certain positions that have not kept pace with duties and fall below similarly situated positions both within our organization and within our labor market area. It will most likely take years to implement changes to our classification plan that fully updates positions to more competitive levels in our market area. The Town has agreed with the AFSCME labor units to reopen wage agreements to address any inequities uncovered in the plan update, and this seed money will enable the Town to show good faith by addressing the highest of these priorities while we develop a multi-year plan for achieving better equity for any other affected positions.

#### Regional Agencies

The budget also provides funding for the other various regional agencies to which the Town belongs including:

Martha's Vineyard Health Care Access  
Martha's Vineyard Commission  
Dukes County Regional Housing Authority  
Martha's Vineyard Shellfish Group

In closing I thank the Board of Selectmen for your efforts in reviewing the proposed spending program for the upcoming fiscal year, and I stand ready to answer any questions or provide additional materials as you may need.

**BALANCED BUDGET SUMMARY**



## **TOWN OF OAK BLUFFS, MASSACHUSETTS**

### **BALANCED BUDGET SUMMARY**

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The Town provides a balanced budget each year such that all appropriations: including departmental budgets and articles for supplemental and capital purposes approved through Town Meeting action; Intergovernmental assessments; or amounts otherwise legally required to be raised, are fully funded through four categories of funding: Property taxes, other local revenues, state revenues, and other available funds.

Details of the four categories of funding sources are on the accompanying Revenue Summary Pages. Amounts appropriated are summarized on the accompanying Expenditure Summary Pages, and are detailed in a separate section by each department.

The Town reports this data to the Massachusetts Department of Revenue, Division of Local Services each year as part of setting the official tax rate. These Tax Rate Recapitulation forms are publicly available through the Department of Revenue. This process also ensures the Town does not exceed the maximum allowable levy permitted under Proposition 2 ½. The appropriations and funding sources, for each of the three funds requiring budget adoption, for each of the prior three years, and the projected amounts for FY 2019 are presented below.

**TOWN OF OAK BLUFFS, MASSACHUSETTS  
BALANCED BUDGET SUMMARY**

	<u>FY 2016 Budget</u>	<u>FY 2017 Budget</u>	<u>FY 2018 Budget</u>	<u>FY 2019 Proposed Budget</u>
<b>SOURCES</b>				
<b>General Fund Sources:</b>				
Property Taxes	\$ 21,124,556	\$ 23,128,995	\$ 23,789,876	
Local receipts	2,781,300	3,486,000	3,939,000	
State receipts	1,242,045	1,220,095	1,282,581	
Other available funds	499,424	941,755	1,689,844	
Total General Fund Sources	25,647,325	28,776,845	30,701,301	-
<b>Community Preservation Fund Sources:</b>				
Property Tax Surcharge	500,000	535,000	500,000	
State Revenues	206,813	139,980	127,700	
CPA Fund Balances and Reserves	1,065,972	1,087,810	693,815	
Total Community Preservation Fund Sources	1,772,785	1,762,790	1,321,515	-
<b>Sewer Enterprise Fund Sources:</b>				
Sewer Enterprise Revenues	1,427,667	1,467,667	1,468,667	
Sewer Enterprise Retained Earnings	40,000	100,000	295,000	
Total Sewer Enterprise Fund Sources	1,467,667	1,567,667	1,763,667	-
Total all sources	28,887,777	32,107,302	33,786,483	-
<b>USES</b>				
<b>General Fund Appropriations:</b>				
Departmental operating budgets	25,625,871	28,776,844	30,592,817	
Supplemental & Capital article appropriations				
Miscellaneous appropriations	21,454		108,484	
Total General Fund Uses	25,647,325	28,776,844	30,701,301	-
Community Preservation Fund Appropriations	1,772,785	1,762,791	1,321,515	
Sewer Enterprise Appropriations	1,467,667	1,567,667	1,763,667	
Total all uses	28,887,777	32,107,302	33,786,483	-
<b>NET BUDGET</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>

REVENUE BUDGET SUMMARY



**TOWN OF OAK BLUFFS, MASSACHUSETTS**  
**REVENUE BUDGET SUMMARY**

The Town has the requirement to implement legally adopted budgets for three of its operating funds. The General Fund, the Wastewater Enterprise Fund, and the Community Preservation Act Fund. The Town's General Fund is primarily funded through four major sources: Property Taxes, local receipts, state receipts, and other available funds. The Town's Enterprise activity (Wastewater) is funded through user fees, accumulated Retained Earnings, or may be subsidized by the taxpayers. The Community Preservation Act Fund budget is funded through a property tax surcharge, state matching revenue, or accumulated, reserved, or undesignated fund balances.

**GENERAL FUND SOURCES**

**Property Taxes**

Property Taxes are the largest revenue source of the Town comprising approximately 85% of the FY 2019 General Fund sources. Property taxes are levied on real (land and buildings) and personal (equipment and furnishings) property. Statutorily, the Town is required to update property values every five years and obtain certification from the Department of Revenue that such values represent full and fair cash value. The Town last completed this process in fiscal year 2017. On an annual basis between the five year revaluations, interim adjustments are performed as part of setting the annual tax rate. Finally, every nine years, the Town is required to complete a "measure and list" valuation which requires a physical inspection of each taxable property in town.

The amount of property taxes the Town can raise is governed by Proposition 2 ½. In total, the Town cannot raise more than 2 ½ % of the Town's taxable full and fair cash value, excluding debt and capital exclusions – this is known as the Levy Ceiling. In addition to the Levy Ceiling, there is a secondary limit known as the Levy Limit. This secondary limit provides that the current year's property tax levy may not exceed more than 2 ½ % of the previous year's Levy Limit, plus additional amounts from any "New Growth" in the property tax base. Taxpayers may also vote to authorize an operating override, or provide for a debt or capital exclusion, which would be added to the Levy Limit. The following shows the calculation of the Town's annual Levy Limit and Levy Ceilings:

	<u>2016 Actual</u>	<u>2017 Actual</u>	<u>2018 Actual</u>	<u>2019 Projected</u>
Prior year Levy Limit	19,408,891	20,064,474	20,757,301	
Add: 2.5%	485,222	501,612	518,933	
Add: New Growth	170,361	191,215	218,326	
Add: Operating Overrides				
Current Year Levy Limit	20,064,474	20,757,301	21,494,560	
Add: Debt & Capital Exclusions	1,689,452	2,377,314	2,318,828	
Maximum Allowable Levy	21,753,926	23,134,615	23,813,828	
Actual Property Tax Levy	21,668,583	23,128,995	23,789,876	
Excess Levy Capacity	85,343	5,620	23,952	
Levy Ceiling	67,795,878	70,947,837	75,957,459	
Remaining Property Tax Levy Capacity	46,127,295	47,818,842	52,167,583	
Resulting Property Tax Rate	8.11	8.15	7.83	

**TOWN OF OAK BLUFFS, MASSACHUSETTS**  
**REVENUE BUDGET SUMMARY**

The Town also raises an amount sufficient to provide for errors in assessments and tax reductions for statutorily provided exemptions. The allowance for abatements & exemptions is funded within the overall tax levy and results in a reduced net property tax that is available to fund the remainder of the operating budget. The calculation of the net property tax levy follows, and is the amount presented in the Balanced Budget Summaries as available to fund budget uses.

	<u>2016 Actual</u>	<u>2017 Actual</u>	<u>2018 Actual</u>	<u>2019 Projected</u>
Actual Property Tax Levy	21,668,583	23,128,995	23,789,876	
Allowance for Abatements & Exempt.	123,385	133,111	103,066	
Property Tax Levy, Net (Amount available to fund budget uses)	21,545,198	22,995,884	23,686,810	

**Local Receipts**

Local Receipts are the second largest funding source of the general fund budget, approximating 13% of total funding sources. Local receipts include revenues such as: motor vehicle, meals, room and boat excise; departmental fees; rental income; licenses and permit fees; fines and forfeitures; investment income; and other miscellaneous receipts. Each year, local receipts are estimated conservatively based upon a review of the prior three year actual collections, collection and revenue trends for the current fiscal year, and adjusting for any known changes in the environment which would affect these targets from being reasonable and attainable.

**Motor Vehicle Excise** is authorized by Massachusetts General Law (MGL). The excise rate is \$25 per thousand and is assessed on 90% of the vehicle's value in the first year, 60% in the second year, 40% in the third year, 25% in the fourth year, and 10% for all remaining years. Values are determined by the Massachusetts Registry of Motor Vehicles using a formula based on a manufacturer's list price and year of manufacture. The Town in which a vehicle is principally garaged at the time of registration is entitled to the motor vehicle excise tax. Tax Commitments are prepared by the Registry of Motor Vehicles and transmitted to the Town for printing and mailing. This revenue is dependable in its collection, but is susceptible to decline during times of economic decline due to reduced new auto sales.

**Meals and rooms excise** is a local option statute authorized by MGL. Town taxpayers have authorized a rooms excise rate of xx% for short-term rentals and a meals excise rate of xx%. These excise receipts are added to the room charges of motels, inns, bed & breakfasts, etc and to restaurant meal checks. These additional charges are collected by the vendor and remitted to the Massachusetts Department of Revenue, who administers, monitors and enforces the meals and rooms excise tax program. Amounts collected are remitted to the Town periodically during the fiscal year. These revenues are dependable and predictable in collection, but are susceptible to decline during economic downturns due to reduced vacation stays/room rentals and less/lower meal sales during these periods.

**Boat Excise** is authorized by MGL. The excise rate is \$10 per \$1,000 of valuation by the Commonwealth, which is based upon the vessel's age and length. Only 50% of this revenue is available to budget in the General Fund, as the Town credits 50% of boat excise collections to the Municipal Waterways Improvement and Maintenance Fund required under MGL. This revenue and a consistent collection rate are predictable.

**Penalties and Interest** result from charges and payments on overdue property taxes and excise bills. Interest rates for overdue real and property tax bills are 14%. If taxes remain unpaid and are liened, the rate increases to 16%. The rate for delinquent excise bills is 12%. These rates are established under

## TOWN OF OAK BLUFFS, MASSACHUSETTS

### REVENUE BUDGET SUMMARY

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MGL. Uncollected tax and excise bills are also assessed a fee to issue a demand for payment notice, as well as potential additional charges. Properties that are liened may also incur additional fees/costs such as legal fees, advertising costs and filing fees at the Registry of Deeds. This revenue is predictable based upon past collection history and may increase during economic downturns due to increase amount of tax bills paid after the due date. Overall revenues tend to decline during a recovery from an economic decline. Due to the ability to lien real property and to flag unpaid excise bills at the registry, these fees are also reliable.

**Solid Waste Fees** represent sales of resident stickers for solid waste disposal, and for charges for disposal at the transfer station. These fees are considered reliable and predictable and are established and reviewed periodically.

**Fees and Other Departmental Revenue** are revenues derived from departmental operations and represent a variety of charges such as copy charges, accident report fees, administrative fees charged on police and fire details, municipal lien certificates, planning board and conservation fees.

**Rentals** revenue is a result of charges paid to the Town for use of Town facilities.

**Licenses and Permits** revenue are derived from charges related to the Town's regulation of certain activities. Some of the larger license and permit fees include alcohol licenses; liquor licenses; common victualer licenses; entertainment licenses; building permits, which are based upon the estimated cost of a building project; electrical and plumbing permits. The Board of Selectmen is the primary licensing agency in the Town. Fees for licenses or permits are set in accordance with MGL, Town Meeting, or set periodically by the Board of Selectmen. Collection of these charges are predictable and reliable based upon set fee schedules and require payment in order to obtain the permit or license. These revenues are susceptible to fluctuation during economic declines and recovery, largely related to reduced construction activity.

**Fines and Forfeits** are derived, primarily, from three sources. District Court fines are assessed by the court for civil infractions and criminal offenses and remitted to the Town. Registry of Motor Vehicles surcharges are remitted to the Town by the Deputy Tax Collector for fees collected to remove flags from the RMV system so an individual may register a vehicle or renew a license after fully paying a delinquent motor vehicle excise bill. Moving violations fines (tickets) are collected by the District Court and remitted to the Town periodically.

**Investment Income** represents interest earned by the Town in various bank accounts utilized to maintain town operations. Available balances are maintained primarily for safety and liquidity. Return seeking are lower priority consideration for the Town's operating funds. Interest for other funds, such as the Stabilization Fund and Trust Funds, remain in those funds and are not included in the Town's operating budget.

**Marina Fees** represent charges for slip/mooring and service fees charged by the Oak Bluffs Marina. This revenue source is considered consistent and reliable due to the level of activity and demand for services by the marina facility.

**TOWN OF OAK BLUFFS, MASSACHUSETTS  
REVENUE BUDGET SUMMARY**

<b>LOCAL RECEIPTS SCHEDULE</b>	<b>FY 2016 Actual</b>	<b>FY 2017 Actual</b>	<b>FY 2018 Budget</b>	<b>FY 2019 Budget</b>
Motor Vehicle Excise	867,827	890,023	875,000	
Meals Excise	320,024	339,753	280,000	
Room Excise	484,808	525,640	500,000	
Boat Excise	4,650	13,015	10,000	
Penalties and Interest on Taxes and Excise	450,236	272,838	270,000	
Payments in Lieu of Taxes	13,439	16,201	15,000	
Solid Waste Fees	214,935	205,355	200,000	
Fees	132,093	125,988	125,000	
Rentals	55,106	54,557	54,000	
Departmental Revenues	263,462	214,600	200,000	
Licenses and Permits	352,315	466,995	450,000	
Fines and Forfeits	35,970	19,293	19,000	
Investment Income	15,976	16,682	16,000	
Marina fees	<u>1,008,560</u>	<u>942,107</u>	<u>925,000</u>	
<b>Total Local Receipts</b>	<b>4,219,401</b>	<b>4,103,047</b>	<b>3,939,000</b>	<b>-</b>

**State Receipts**

State Aid is the third largest revenue funding source of the General Fund budget, representing just under 4% of the overall sources. The Town receives various sources of state aid, described below, primarily reported on the "Cherry Sheet." Cherry Sheet revenues are exclusive of other aid, such as grants that are earmarked for funds other than the General Fund, and are available to supplement the General Fund Budget. The Cherry Sheet amounts are reduced by any amounts of "offsets," or aid that is restricted to a separate fund to be spent without appropriation for a specific use. This results in only the net amount being available to support the General Fund budget. State revenue is not considered as reliable to our local receipts as the level of support is subject to the economic fortunes of the Commonwealth as a whole, as well as a political and legislative budget process.

**School Aid (Chapter 70)** – Chapter 70 School Aid is based upon a state mandated funding formula that takes into account (1) statewide average cost per pupil; (2) local district pupil counts, with weighting factors to reflect varying costs among educational programs, and (3) the municipal "ability to pay," as measured by income and property wealth factors.

**Unrestricted General Government Aid** – These funds are unrestricted and can therefore be used by the municipality for any municipal purpose.

**Charter School Tuition Reimbursement** – is a reimbursement for the Town for the student tuition and the capital facilities tuition component paid to Commonwealth charter schools.

**Veterans' Benefits** – Municipalities receive a 75% reimbursement on the total expenditures paid for veterans' benefits. These reimbursements are provided for under MGL Chapter 115, Section 6.

**TOWN OF OAK BLUFFS, MASSACHUSETTS  
REVENUE BUDGET SUMMARY**

**Exemptions: Veterans, Blind Person, Surviving Spouse** – this aid payment is to reimburse municipalities for property tax exemptions granted to qualifying individuals.

**State Owned Land** – is a payment to municipalities to reimburse it for forgone tax revenue related to parcels of tax-exempt state owned land in the Town.

<b>STATE RECEIPTS SCHEDULE</b>	<b>FY 2016 Actual</b>	<b>FY 2017 Actual</b>	<b>FY 2018 Budget</b>	<b>FY 2019 Budget</b>
Education Aid	880,807	910,282	924,052	932,452
Unrestricted Gen. Govt. Aid	67,044	69,927	72,654	75,197
Charter School Tuition	147,492	94,644	138,315	43,280
Veterans' Benefits	41,660	46,411	42,589	58,864
Exemptions: VBS	17,546	17,317	23,535	25,820
State Owned Land	82,496	81,514	81,436	94,653
<b>Total State Receipts</b>	<b>1,237,045</b>	<b>1,220,095</b>	<b>1,282,581</b>	<b>1,230,266</b>

**Other Available Funds**

COMMUNITY PRESERVATION ACT FUND

WASTEWATER ENTERPRISE FUND

TOWN ADMINISTRATION



# Housing Production Program Application

<b>Applicant Information</b>			
Municipality	Oak Bluffs, Massachusetts		
Name of chief administrative official	Robert Whritenour, Town Manager		
Name, title, and email address of application contact	Robert Whritenour, Town Manager rwhritenour@oakbluffsma.gov 56 School Street P.O. Box 1327 Oak Bluffs, MA 02557		
Phone	508-693-3554 X115		
Web address	Oakbluffsma.gov		
Mailing address:	Physical address (if different):		
P.O. Box 1327 Oak Bluffs, MA 02557	56 School Street Oak Bluffs, MA 02557		
Does the municipality currently have a multifamily housing development moratorium?	No		
Type of housing production planning to be implemented (comprehensive master plan, Housing Production Plan, etc.)	Housing Production Plan		
Type of technical assistance sought	Rezoning____ Community Development Capacity- Building_X____ Public infrastructure design____ Data Transparency_____		
Grant amount requested (Local design services only, \$100,000 maximum)	\$100,000		
Latest DHCD Subsidized Housing Inventory percentage	6.83% (2/17)	Has the municipality adopted the Community Preservation Act?	YES
Does the municipality have a current DHCD-approved HPP?	NO	Has the HPP been certified by DHCD?	NO
Does the municipality have a DHCD-approved Chapter 40R district?	NO	Does the municipality have a zoning district that allows by-right multifamily housing?	NO
Does the municipality have a signed Community Compact?	YES	Is the municipality pursuing a housing best practice under the Community Compact?	No
Total new housing units to be created through this application	Estimated 40 – 60 units	New affordable housing units to be created through this application	Estimated 40-60 units

## **Application Narrative**

***Briefly describe the applicant municipality's current housing stock, the housing choices currently available to households of varied ages and incomes, and the local and regional need for additional housing growth.***

Oak Bluffs, Massachusetts is one of six towns on Martha's Vineyard and the home to the largest year round population on the island. It is projected that the population of the town will increase by 30% over 25 years and this will be pronounced in the 65 plus age bracket. Oak Bluffs' year round population may grow at a rate almost three times higher than any other Island town - adding close to 1400 year round residents between 2010 and 2035. At the same time, the number of available year round homes, particularly rental units, is shrinking as housing stock is converted to airbnb or seasonal rentals. About 66% of the housing stock has been taken out of commission for year round use. The Island's housing stock is 91% single family homes. The Island's year-round workforce is just over 8,800 with 3,000 to 5,000 additional seasonal workers in the summertime. The Island's year-round population is just under 18,000 and swells to an estimated seasonal population of 85,000 during July and August. The fluctuations place a tremendous amount of strain on the Island's infrastructure for water, wastewater, roads, and especially housing.

The median price of a house in Oak Bluffs, the least expensive town on Martha's Vineyard, has risen close to 70% since 2000 to \$644,500 in 2016. The income needed to afford the median sales price for a single family home is \$170,000, far above the Oak Bluffs median household income of \$80,225. A high percentage of year round residents are involved in the service industry, which is impacted by higher unemployment during off season months. Close to 40% of all year round households in Oak Bluffs have low/moderate income and more than half of these households spend more than 50% of their total gross income on housing. Between 2010 and 2014, the Island population grew by 514 at the same time that 1510 single family homes converted from year round to seasonal use. As a result, the supply of affordable housing as well as year round rental units for all income levels has been depleted.

The Dukes County Regional Housing Authority that manages affordable housing for low and moderate income residents had a waitlist of 230 as of 7/2017. Island Elderly Housing, the largest subsidized complex on the Vineyard had 124 on their waitlist at the same point in time. Between February 2016 and June 2017, 120 individuals and families self-identified as homeless or at imminent risk of becoming homeless and even with access to rental vouchers were unable to secure year round housing. It is estimated that the Island needs 635 affordable rental units to address the immediate demand of current residents. There is an additional need for housing for those citizens with incomes 30% or below AMI, especially for the expanding elder population.

***Please describe the applicant municipality's planning vision for meeting local and regional housing needs. What planning efforts inform this vision? How did the municipality engage community stakeholders in setting this planning vision?***

Oak Bluffs undertook a comprehensive community engagement process to ensure maximum input from local residents. The Selectmen, Planning Board, and Housing Committee held three community workshops, facilitated by a consultant team, to create housing visions, identify five-year goals, and prioritize implementation strategies. These workshops were held at the Oak Bluffs School on

September 21, November 16, and December 14, 2016. In addition, the All-Island Planning Board issued an online survey about housing needs and strategies that had over 600 respondents.

The purpose of the first of three community workshops in Oak Bluffs was to introduce participants to the Housing Production Plan (HPP) project scope and schedule, to discuss housing needs in the community and Island-wide, and to develop a preliminary housing vision for the community and the Island. The following themes emerged as residents considered the current housing environment in Oak Bluffs and ideas for the future of housing in their community: the town as the Island hub, cooperation and collaboration needed to balance needs and resources on the Island, and pride in diversity of the community. Workshop participants identify Oak Bluffs as the Island hub - home of the Island's hospital, regional high school, Island Elderly Housing Campus, MV Community Services, and the YMCA. Its services and infrastructure serve both seasonal and year round residents from across the Island. Through cooperation and collaboration, Oak Bluffs workshop participants want to reach out into the larger Island community to balance the needs and resources of all Island towns and residents more equitably. Participants are proud of the town's diversity and strong sense of community - two characteristics that can be strengthened and shared through thoughtful housing development and resource allocation. Participants envisioned a future for Oak Bluffs where there are multi/intergenerational apartment complexes, more year-round housing, affordable housing, mixed-use, and more innovative housing options.

The purpose of the second of three community workshops in Oak Bluffs was to solicit participants' feedback on the draft housing visions for Oak Bluffs and Island-wide, to introduce the concept of HPP goals and strategies, to discuss the draft goals for Oak Bluffs and Island-wide, and to begin to brainstorm strategy ideas to help achieve these goals. Information: An interactive presentation gave participants an understanding of the purpose of Housing Production Plan (HPP) goals and strategies, as well as an overview of the results-to-date of the All Island Planning Board Online Housing Survey. Public input: Through a series of open house exercises, participants were asked to provide their feedback on the draft housing visions for Oak Bluffs and Island-wide. Working in small groups, participants assessed the draft housing goals for both Oak Bluffs and Island-wide, and brainstormed strategy ideas for achieving these goals.

The third community wide meeting reviewed the findings of the first two sessions and focused on proposing strategies that would help Oak Bluffs move forward on increasing its affordable housing stock.

***What strategies will the municipality employ to deliver on its housing vision? What actions, if any, has the municipality taken to implement its housing vision?***

Oak Bluffs developed the housing vision and goals through a detailed analysis of housing needs, input from town officials and community members, guidance from the All Island Planning Board Housing Work Group, as well as the consultant team's review of relevant planning documents. The community is committed to creating more affordable housing as well as offering more housing choice while recognizing and supporting the town's ability to achieve other interrelated community goals, including the protection of historic and natural resources and strengthening the local economy.

Oak Bluffs' community members envision that in 2027 the community will continue to value its diversity, safe and historic neighborhoods, rich recreational assets, scenic and waterfront views,

vibrancy as a tourist destination, and highly-engaged year-round population. Recognized as the Island's hub, this walkable and bike-able community will make great strides in creating greater housing options that balance the needs of all year-round residents more equitably, including low/moderate-income households and middle-income households, and maintain the integrity of historic areas.

The Oak Bluffs' community wants all Island towns to work together to help create affordable workforce housing and support infrastructure expansion in Oak Bluffs, which is critical to supporting the regional resources, such as, but not limited to, the hospital, schools, and Community Services. Through thoughtful, sustainable housing development, resource allocation, and expanded infrastructure capacity, including public sewer, the town will carefully manage its growth as one of the highest population and most vibrant of the Island's towns. Community members envision that Oak Bluffs will increase the diversity of housing choice in the community with the creation of intergenerational apartment complexes in key areas of town; accessory apartments; year-round affordable rental units; townhouses; condominiums; and mixed use "top-of-the-shop" buildings in commercial areas.

Community members hope that the town will support and encourage affordable housing for low/moderate and middle-income households by creating new tax incentives, updating zoning, and working collaboratively to lobby for expanded funding resources for affordable housing such as a new Vineyard Housing Bank, modeled after the Martha's Vineyard Land Bank. Community members envision conversions of larger homes to multi-family units; the building of smaller homes, including tiny houses; development of cluster housing and co-housing on larger properties; and that older homes will be kept-up through a well-funded housing rehab program for low/moderate-income homeowners that provides funds for health and safety improvements and includes historic preservation standards. The purpose of these efforts to expand housing options will be to preserve and support the community's diversity and provide more affordable year-round housing options for community members including adult children who couldn't otherwise afford to live in the community where they were raised.

Specifically, the town will support the creation of sixty-eight or more low/moderate income (LMI) units over five years (an average of fourteen LMI housing units per year) that will count on the Subsidized Housing Inventory, particularly rental units affordable to households with less than 30 percent AMI and 30-50 percent AMI and ownership units affordable to households with income between 50-80 percent AMI. This rate of LMI housing production will support the town reaching 10 percent within five years (by 2022). In addition, Oak Bluffs will support the creation of at least ten ownership units over five years that are affordable to households between 80-100 percent of the area median income.

***Briefly describe the specific barriers that prevent the full realization of the municipality's vision for housing growth.***

Oak Bluffs faces several obstacles in moving toward full realization of their housing goals and these include environmental constraints, limits to infrastructure capacity, and regulatory barriers.

Specifically, the town needs to address the following challenges:

- The extremely porous nature of the soils throughout most of Oak Bluffs permits a high rate of recharge of groundwater by precipitation. However, this also allows rapid infiltration of contaminants such as those from individual septic systems, sewage disposal systems and run-off from roads and fertilizers.
- Water quality in Lagoon Pond is impacted by nitrogen from on-site septic systems and to a lesser extent by fertilizer, storm water and agricultural activities. The MA Estuaries Project has determined that a 50 percent reduction in septic load from two of the pond's sub watersheds would meet the Total Maximum Daily Load of nitrogen.
- The Sengekontacket Pond exceeds the acceptable level of nitrogen. There are several options for nitrogen removal including creating a larger culvert in Trapp's Pond and sewerage of the Major's Cove area.
- Oak Bluffs provides important habitat to a number of endangered plant and animal species including the Roseate tern. In addition, the 5,000+ acre Correllus State Forest which lies partially within Oak Bluffs is home to the highest concentration of rare species in the state.
- Currently, the town's sewer system is working at capacity with very little room for additional capacity, particularly during the summer months.

***MassHousing's Planning for Housing Production Program will build local capacity to implement housing planning, by providing municipalities with high-impact consultant services.***

***What are the technical assistance services requested by the municipality, as part of this grant program? What specific activities will the municipality and MassHousing's technical assistance consultants collaborate on? How will these planning implementation services assist the municipality in overcoming locally-identified housing production roadblocks?***

The Oak Bluffs Affordable Housing Committee has identified a parcel of 7.76 acre town owned land that they are proposing to develop into an affordable housing complex. While rental apartments have been determined to be the priority need in the community, the land might also contain opportunities for affordable home ownership. The property is located on the main thoroughfare on the Island, adjacent to a number of community institutions including Martha's Vineyard Community Services, the YMCA, the Ice Arena, and the High School. These entities are linked to town sewerage, however, there may be no sewer capacity left to service a new housing development. There are also plans being considered to rezone this area including the transportation corridor along Edgartown-Vineyard Haven Road in addition to extending other infrastructure and utility services.

Oak Bluffs is requesting technical assistance consultation, including the expertise of a site (civil) engineer, to assist the town in assessing the building challenges as well as the community benefits presented by this proposed development. Oak Bluffs has already determined that the town has clear title to the property. However, outside consultants are needed to help evaluate whether a housing development is physically and financially feasible on this lot as well as the impact of the new housing on traffic, school enrollment, utilities, public services, and water resources as well as assist in the

development of a viable plan for the housing units. This predevelopment assessment is critical to the eventual formulation of a Request for Proposals for developers.

Members of Oak Bluffs Affordable Housing Committee, its Building Department Planning Board, and Board of Selectmen will collaborate with any consultants contracted through this grant and help to ensure maximum ease in accessing relevant files, reports, regulations, history and resources necessary to complete the assessment of this property. The site assessment funded through this grant will include an evaluation of both development issues and financial feasibility. This information is critical to appreciating the scope of the proposed project and its potential impact on the inventory of affordable housing units in Oak Bluffs. One of the primary barriers to development in the town is the limitations of the current sewer system and the reality that it is functioning at near peak capacity. Any additional demand on the sewer system needs to be carefully assessed and if this is not an option, alternative systems that are safe, effective, and cost effective need to be identified. Technical assistance around this issue is vital to providing the town and its residents with the facts needed to make an informed decision about development of a high density housing project in this area and to ensure that it has no negative environmental effects.

***What is the deliverable work product, or set of deliverables, that will result from the technical assistance being sought?***

Oak Bluffs is requesting funding for technical assistance consultation to help inform the development of an RFP that will solicit applications from developers who will design and build an affordable housing complex in the community. This technical assistance will include wastewater engineering consultants who will determine the capacity of current options and propose a wastewater treatment plan for the project as well as professional consultants who can complete an overall site assessment and a projection around the financial feasibility of the project.

Specifically, the town is requesting technical assistance to deliver the following work products:

- A preliminary topographical, environmental and zoning evaluation of the site, highlighting strengths and challenges to housing development
- A review of local and state regulations that apply to the site and to the community that need to be complied with and considered in designing the project
- A preliminary engineering and conceptual site design that informs the size and scope of the project as well as roads and utilities
- A preliminary financial feasibility analysis that includes avenues for financing, whether the project will include market rate housing in addition to affordable housing and home ownership as well as rental opportunities.

***What is the anticipated duration of the consulting services engagement?***

It is anticipated that Oak Bluffs will contract with outside consultants for a 12 – 15 month period.

***Briefly describe the feasibility and marketability of the applicant municipality's housing planning vision.***

The project proposed has several significant advantages in moving forward as a housing development that will increase the number of affordable units in the town of Oak Bluffs.

First, the location of the project will be particularly attractive to families with children. This is a population that is heavily employed in the service industries on the Island, but who increasingly find the cost of an entry level house beyond their reach. They are dependent upon the rental market for housing. This housing complex will be located off a main thoroughfare, with easy access to public transportation (bus) and a few miles from the services and conveniences offered in three main town centers. It will also be adjacent to Martha's Vineyard Community Services, an early childhood center, the YMCA, the Ice Arena, a skate park, the Performing Arts Center, the teen center and the regional high school. In addition, there is an ongoing committee looking at enhancing the environment and range of programming available in this sector that will make this affordable housing project even more desirable.

Second, the location is attractive to employees of the main businesses on the Island, including the high school, MV Community Services, Martha's Vineyard Hospital, Stop and Shop, the airport and the Steamship Authority. Residents will have easy commutes by either car or bus to all of these employment opportunities.

Third, there are limited residential abutters to the property. The land is bordered by the ice arena to the left and a landlocked parcel to the rear. The property is wide enough to address concerns that may be raised by the half dozen abutters on the right of the development. The parcel fronts on a main thoroughfare with heavy traffic so that additional traffic will not change the complexion of the neighborhood.

Finally, during the HPP process, this parcel of land was prioritized by residents as an attractive location for high density development. It is viewed as a project that will have the most positive impact on the need for affordable housing units while having the least negative impact on the small town culture of the community.

***Briefly describe how the proposed grant activities are consistent with previous local planning efforts.***

The Oak Bluffs Affordable Housing Committee meets bimonthly to assess the current need for affordable housing in the community, review the vision and strategies proposed by the HPP of 2017, identify town owned building sites, prioritize affordable housing projects, collaborate with local and regional entities that can help develop, revitalize or manage affordable housing including Island Housing Trust, Habitat for Humanity, The Resource for Community and Economic Development, Inc (TRI), the Martha's Vineyard Commission and the Dukes County Regional Housing Authority. All meetings are open to the public and minutes are posted online. The Oak Bluffs Affordable Housing Committee has developed this grant proposal on behalf of the town of Oak Bluffs.

The Housing Production Plan process was also effective in engaging and educating the community around the housing crisis on the Island and as it impacts on Oak Bluffs. One of the HPP activities was to identify all potential building lots in the town and prioritize them for development. Many of the small lots have been set aside for an affordable home ownership initiative. The project proposed to be evaluated with this grant support represents the largest parcel of undeveloped land in the town. The town owned property is the most attractive for high density affordable rental housing while

possibly unlocking economic development opportunities for the Town.

***Briefly describe how the proposed grant activities are consistent with previous regional planning efforts, where applicable.***

Efforts to provide greater number of Affordable Housing units are priorities in each of the six island towns. Each town included similar zoning development and provision of affordable housing goals in their HPP. In addition, the Oak Bluff's Housing Production Plan is consistent the following regional planning documents :

- Martha's Vineyard Commission's (MVC) 2009 Island Plan,
- 2013 Martha's Vineyard Housing Needs Assessment,
- 2014 Martha Vineyard Zoning Analysis for Affordable and Community Housing.
- Massachusetts Estuaries Studies of Coastal Ponds for Lagoon, Sengekontacket, and Farm Ponds
- 2015 MVC's Regional Transportation Plan
- 2016 Healthy Aging Martha's Vineyard's Needs Assessment

The MVC has also has been very active in working to develop an island wide strategy with the All Islands Planning Board's Housing Work Group and Healthy Aging on Affordable Housing. Just recently the MVC was awarded a grant to develop a housing siting tool for island towns. In 2017, the MVC worked with the town to adopt a mixed use development by-law in the B-1 Business District. The MVC will continue to support zoning changes with a sharp focus on multi family housing.

***Briefly describe how the proposed grant activities are consistent with the Commonwealth's sustainable development and fair housing principles, including affirmative fair housing marketing requirements.***

The proposed grant application is consistent with the following Commonwealth's Sustainable Development Principles: Expanding Housing Opportunities, Concentrating Development and Mixed Uses, Using Natural Resources Wisely, Protecting Land and Eco-systems, Providing Transportation Options, Planning Regionally, and Increasing Jobs and Business Opportunities in addition to helping local boards make efficient decisions. The proposed grant is a great opportunity for the town to continue to fulfill the Commonwealth's Sustainable Development Principles in Housing, Water Quality, Transportation, and Economic Development.

The Town of Oak Bluffs is keenly aware that with any development opportunities there has to be a great balance between competing land uses. The Island's economy is directly dependent on protecting the Island's Natural resources and Water Quality while creating needed Housing options for Island residents and Workforce. Future generations will benefit greatly by the Towns thoughtful and pro-active efforts to address these two paramount issues.

***How will the proposed grant activities result in the achievement or maintenance of production-related safe harbor status under Chapter 40B?***

Oak Bluffs has 158 units in the state housing inventory (SHI) for affordable housing. This is 6.8% of

the units needed to achieve the state goal of 10% of housing units being designated as affordable. Oak Bluffs has completed a Housing Production Plan that outlines the steps it will take to ensure that it meets the 10% goal of affordable housing units. This project will help Oak Bluffs move toward meeting this objective and will result in the town achieving safe harbor status under Chapter 40B.

***All awards will require a local cash match, equal to 10 percent of the value of the consultant services awarded. MassHousing will confirm the estimated cost of the proposed grant activities with the Agency's vendors. Please confirm that the municipality is willing to provide match funding.***

The town of Oak Bluffs will provide a local cash match, equal to at least 10% of the value of the consultant services awarded.



COMMONWEALTH OF MASSACHUSETTS  
**THE GENERAL COURT**  
STATE HOUSE, BOSTON 02133-1053

March 27, 2018

Gregory P. Watson, AICP  
MassHousing  
1 Beacon Street  
Boston, MA 02108

Mr. Watson:

As representatives of the Island of Martha's Vineyard that includes the town of Oak Bluffs, we strongly support Oak Bluffs' grant submission to MassHousing that will provide support for a critically important affordable housing project in that community.

Oak Bluffs, MA is requesting \$100,000 in funding from MassHousing for technical assistance consultation to help inform the development of an RFP that will solicit applications from developers who will design and build an affordable housing complex in the community. This technical assistance will include wastewater engineering consultants who will determine the capacity of current options and propose a wastewater treatment plan for the project as well as professional consultants who can complete an overall site assessment and a projection around the financial feasibility of the project.

We are acutely aware of the depletion of affordable and rental housing in Oak Bluffs as well as on the Island as a whole. Nearly 70% of the community's housing stock is now set aside for vacationers, as single family dwellings convert rapidly to seasonal ownership. The population of Oak Bluffs is increasing and year round residents, vital to the economy, are being displaced. The development of the proposed high density affordable housing complex in Oak Bluffs will address a critical housing and humanitarian need.

We encourage MassHousing to respond favorably to this request for technical assistance to help expedite this valuable project.

Respectfully,

A handwritten signature in black ink that reads "Julian Cyr".

Julian Cyr  
State Senator  
cape Cod & Islands

A handwritten signature in black ink that reads "Dylan Fernandes".

Dylan Fernandes  
State Representative  
Barnstable, Dukes, Nantucket



## TOWN OF OAK BLUFFS

### **Municipal Energy Technical Assistance Grant Program**

**COMMBUYS Bid Number: BD-18-1041-ENE01-ENE01-28072**

**Agency Document Number: PON-ENE-2018-017**

**Issued June 1st, 2018**

### TOWN OF OAK BLUFFS GRANT APPLICATION

MUNICIPAL SOLAR PV PROJECT

EVALUATION OF POTENTIAL MICROGRID SYSTEM

INVESTIGATION OF CLEAN ENERGY RESILIENCY OPPORTUNITY AT CRITICAL  
MUNICIPAL FACILITIES

and

INVESTIGATION OF STORAGE OPPORTUNITY AT PUBLIC FACILITY

July 18, 2018

Table of Contents:

Summary.....p.3

Municipal Solar PV Project .....p.4

Evaluation of Potential Microgrid System.....p.8

Investigation of Clean Energy Resilience Opportunity at Critical Municipal Facilities.....p.10

Investigation of Storage Opportunity at Public Facility.....p.11

Appendix A CVEC Consultation Proposal .....p.12

Appendix B Demand Charges on WWTP Electric Bill .....p.16

## SUMMARY

The Town of Oak Bluffs is examining the possibility of utilizing its capped landfill for a photovoltaic (PV) installation in conjunction with a second installation located via solar canopy on the same municipal site. The energy produced by the two photovoltaic installations would be harnessed to power three municipal facilities located in close proximity at the Pennsylvania Avenue municipal complex. The Town of Oak Bluffs would like to utilize the services provided by this grant to evaluate the possibility of installing the two solar PV systems through the use of consultants. One such consultant, the Cape & Vineyard Electric Cooperative, has installed approximately 18 MW of photovoltaics on capped landfills on the Cape and Martha's Vineyard. The Town of Oak Bluffs would like to participate in the next CVEC PV Initiative RFP with the Oak Bluffs capped landfill site getting PV through a PPA with a third-party vendor.

In addition, the Town seeks consultant expertise to assess the feasibility of an accompanying battery to serve the adjacent municipal facilities through a microgrid. Uninterrupted operation during grid outages for the Waste Water Treatment Plant is critical to the municipality and the businesses and residents the town serves. While less critical, the town would benefit if operations at the other two municipal facilities, the Transfer Station and the Highway Department, remained viable during grid outages. For this reason, battery back-up to accompany the on-site solar power is to be examined by professional consultants.

Finally, the shared use of the photovoltaics and battery system by the three facilities presents an opportunity for a microgrid at the Pennsylvania address. The consultant's review would also address the feasibility of the microgrid option.

With a \$12,500 2018 META grant, the town could afford the expertise needed to examine the feasibility of all four options, solar, battery, resilience and a microgrid. The consultant's technical assistance will be completed by May 30, 2020.

- **Estimated annual clean energy benefits (e.g. kWh saved, MMBtu saved, clean energy kWh generated).**

It is initially estimated that PV on the capped landfill could provide the Town of Oak Bluffs with as much as 1 megawatt of solar power for approximately 1,200,000 kilowatt hours annually.

- **Steps completed in the project to date (e.g. town approvals);**

It is a stated goal of the Oak Bluffs Board of Selectmen to work with the town's engineer, Sovereign Consulting, to gain the necessary permits from the Department of Environmental Protection for the PV installation.

The Town is currently an offtaker of CVEC net metering credits from CVEC's 28 MW of PV installed on the Cape and Martha's Vineyard.

The Town looks forward to hosting a PV installation on its capped landfill in similar fashion to the neighboring towns of Tisbury, West Tisbury, and Aquinnah.

- **Why a third party municipal energy consultant is critical for your municipality to implement this project;**

A third-party energy consultant is critical for the Town to implement this project as there are no engineers or solar technical experts on staff to perform the technical analysis to package a project on the capped landfill that would appeal to developers to evaluate and bid on in a CVEC RFP.

- **A discussion of the specific tasks you expect the third party municipal energy consultant to perform once services are awarded;**

Once services are awarded, the Town expects the consultant to interface with the local town officials and Eversource in securing site plans/building plans, acreage, documents for ownership verification, DEP Post-Closure documents, and identification of three phase power resource. In addition, the Town seeks the energy consultant's aid in identifying and creating a system by which needed documents can be provided to bidders during an RFP process. Finally, the Town seeks the energy consultant's aid in identifying projects that ultimately lack feasibility.

## MUNICIPAL SOLAR PV PROJECT

The Town of Oak Bluffs wishes to install photovoltaics on its capped landfill. The META grant would be utilized to bring the project to readiness and the release of a Request for Proposals.

The Town of Oak Bluffs will also examine the feasibility of a second photovoltaic installation installed as a solar canopy serving the adjacent Highway Department building. The META grant would be utilized to bring this project, if feasible, to readiness for a Request for Proposals as well.

o **Visuals that demonstrate there is no shading (buildings, structures, trees).**

The area for the solar canopy, circled in red, is slated for clearing as the area is to provide downtown overflow parking with shuttle service .



Figure 1: Expanded Public Parking Project

The capped landfill is clear of shading and trees.



Figure 2: Oak Bluffs Capped Landfill

- o Visuals that demonstrate there are utility lines nearby. Please mark utility lines clearly on your documents

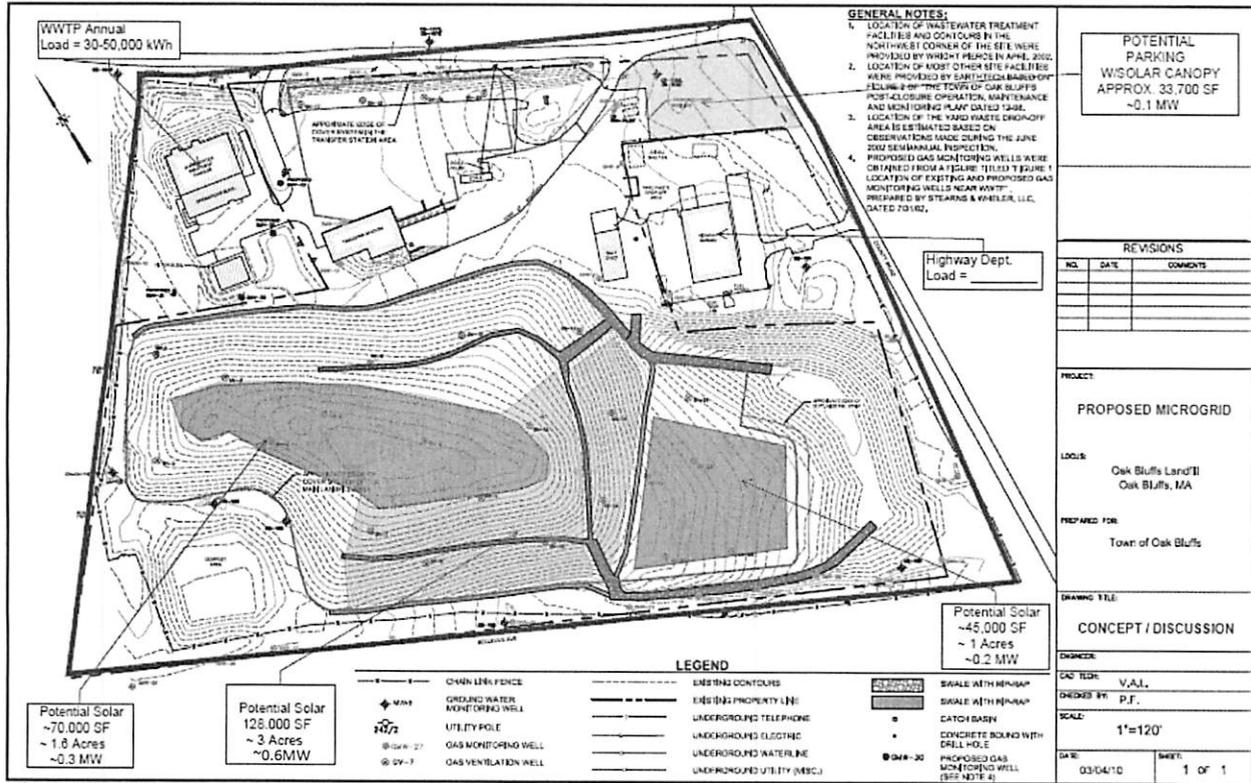
Three phase electric power runs along Pennsylvania Avenue at the southern end of the capped landfill site. Poles are circled in red.



o Visuals that demonstrate the site is either flat, or if sloping, that the system will face south

Using the distinct elevation rises associated with a typical capped land fill as an approximate boundary line, and then using the distance feature on Google Earth, it appears that the landfill is approximately 9.2 acres in size. It also appears that for the most part the lateral peak of the landfill trends somewhat from the North West to the South East so there is around 5 acres of mostly southern facing surface. It also appears there is very limited shadow impacting the landfill.

The solar canopy will be constructed to maximize southern exposure.



## EVALUATION OF POTENTIAL MICROGRID SYSTEM

In conjunction with the installation of photovoltaics on the town's capped landfill, the Town of Oak Bluffs wishes to consider a microgrid to service its three municipal facilities located adjacent to the capped landfill; the Transfer Station, the Wastewater Treatment Plant and the Highway Department Barn. The META grant would be utilized to address feasibility and, if feasible, ready the microgrid opportunity for a Request for Proposals.

o **Price quotes and scope from the proposed consultant**

See Appendix A

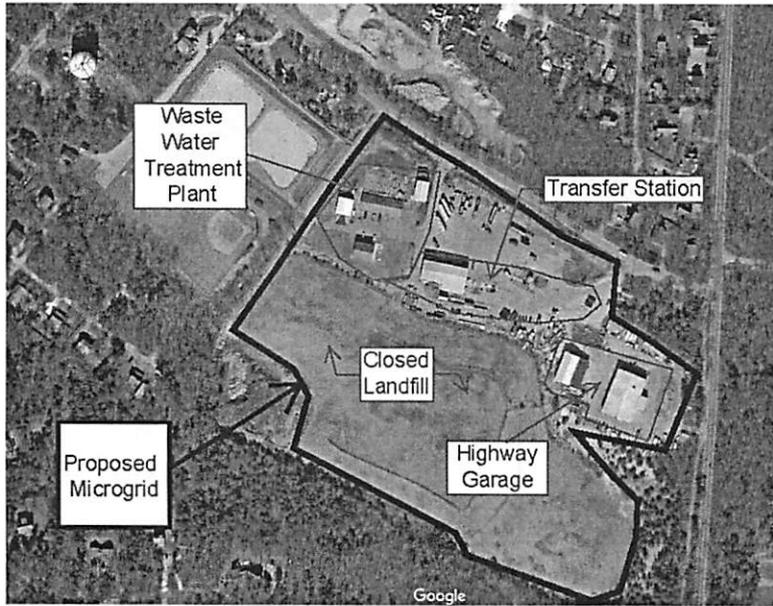
o **Whether or not targeted sites are known at this time. If so, please describe.**

**Targeted Sites: Town of Oak Bluffs WWTP, Highway Department, and Transfer Station**

The Town of Oak Bluffs' waste water treatment plant (WWTP) is located at 17 Pennsylvania Avenue in Oak Bluffs. The WWTP is owned and operated by the Town of Oak Bluffs. The treatment plant opened in April 1, 2002 with a customer base of 503 customers and has grown to a current customer base of 722. This represents approximately 18% of the developed parcels in Oak Bluffs. In 2015, the WWTP treated approximately 39.84 million gallons. The treatment process at the plant is by sequencing batch reactors. The treated waste water is discharged to two on-site surficial leaching fields with a combined leaching capacity of 300,000 gallons per day. The waste water department has a staff of four, consisting of three WWTP operators and an administrator/operator.

The Oak Bluffs Highway Department facility is located at 347 County Road. The Highway Department is responsible for the maintenance of all Town roads and sidewalks; including pothole repair, sidewalk construction and repair, road resurfacing, trash removal, and snow removal. The facility at 347 County Road contains an approximately 9,000-square foot main building which houses the Highway Department offices, vehicle repair bays, and interior storage. In addition to the main building, the facility has a large salt barn and exterior material and vehicle storage areas. The animal control office and animal shelter, and the shellfish department's shed are located in separate small buildings on the facility grounds.

The transfer station is located at 16 Pennsylvania Avenue between the WWTP and the Highway Department. The transfer station is operated under contract to the Town by Bruno's Rollof, Inc. of Vineyard Haven, Massachusetts. Waste and recyclables from *all residents of Martha's Vineyard are accepted at the transfer station*. Specifically, the transfer station accepts items such as municipal solid waste, cardboard, tires, appliances, construction & demolition debris, metal, cathode ray tubes, etc. No hazardous waste is accepted at this location and no waste is disposed of at this facility. All waste and recyclables are transported off-site to mainland facilities for final disposal or recycling. The transfer station facility consists of an approximately 6,000-square foot waste and recycling sorting shed, a guard house, a scale house, and numerous rolloffs used for the disposition of waste and recyclables.



**Proposed WWTP, Transfer Station and Highway Department Microgrid**

## INVESTIGATION OF CLEAN ENERGY RESILIENCY OPPORTUNITY AT CRITICAL MUNICIPAL FACILITIES

The Town of Oak Bluffs' Transfer Station, Wastewater Treatment Plant and Highway Department have varying levels of criticality in times of emergencies and grid outages, with the Wastewater Treatment Plant clearly with most critically needed continuation of operations. All have appropriate generators onsite. The provision of battery power to supplement the on-site generators is desired by the town in order to expand the three municipal facilities' resilience and lessen their dependence on finite fossil fuels. The META grant would be utilized to examine the feasibility of including a battery system with the installation of photovoltaics on the town's adjacent capped landfill and Highway Department parking lot that could support any or all of the three municipal facilities during times of grid outages.

○ Approximate number of people served by the facility on a daily basis

Transfer Station: There are 200 tickets for haulage processed on a daily basis for the Transfer Station. Common residential usage for household disposal is unknown.

Wastewater Treatment Plant: On a daily basis there are 722 homes/municipal/commercial buildings tied into the Town sewer system

Highway Department: The facility serves the municipality rather than a number of people a day.

○ Approximate number of people served by the facility during an emergency

Transfer Station: The number of people served during in an emergency is reduced.

Wastewater Treatment Plant: The number being served during an emergency would depend upon the time of year. A summer emergency event would of course serve many more than a winter emergency event. It should be noted that the facility must continue to function during times of emergency.

Highway Department: The facility serves the municipality rather than a number of people a day. However it should be noted that the functioning of the Department during emergencies, with its responsibility for road clearing, is critical.

○ Existing distributed generation and/or backup infrastructure (type and capacity)

Transfer Station: This information has not yet been received

Wastewater Treatment Plant: Backup generator at the treatment plant is a Kohler Series 60 model 400REOZD (405kW).

Highway Department: Backup generator at the DPW Barn is a Kohler 32kW.

## INVESTIGATION OF STORAGE OPPORTUNITY AT PUBLIC FACILITY

With the photovoltaic installation located on the capped landfill and the power needs presented by the three adjacent municipal facilities, energy storage could present a very real advantage to the Town of Oak Bluffs. The META grant would be utilized to examine the feasibility of including battery power in conjunction with the installation of photovoltaics on the town's capped landfill as a solution to high demand charges imposed at the Wastewater Treatment Plant and, of course, for resilience in times of grid outage emergencies.

### o Annual energy consumption of facility

Transfer Station: 7,767 kWh annually

Wastewater Treatment Plant: 11,280 kWh annually

Highway Department: This information has not yet been received

### o A copy of a recent bill showing demand charges

Transfer Station: There is no Demand Charge imposed on the Eversource billing.

Wastewater Treatment Plant: See Appendix B

Department of Works: This information has not yet been received

### o Interval data for the proposed facility (if exists)

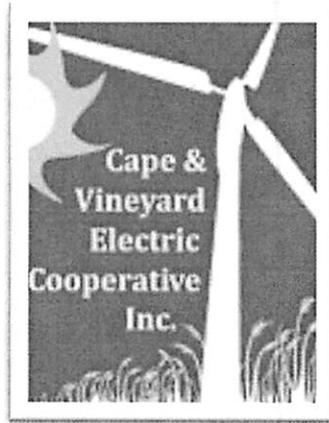
As yet no interval data has been purchased from Eversource for the three facilities

### o If paired with existing municipally owned solar PV, identify system location and size

Not applicable

### o If paired with new solar PV, all documentation required above for Municipal Solar PV projects

See p. 2 through p.4



Cape & Vineyard Electric Cooperative, Inc. in consultation with  
Sovereign Consulting, Inc.

OAK BLUFFS CAPPED LANDFILL  
PHOTOVOLTAICS & STORAGE MICROGRID  
CONSULTATION PROPOSAL

July 18, 2018



Cape & Vineyard Electric Cooperative, Inc.  
23H2 White's Path, Suite 2  
South Yarmouth, MA 02675  
774-722-1812  
[www.cvecinc.org](http://www.cvecinc.org)

## I. SUMMARY

CVEC is a non-profit energy cooperative established in 2007 under MGL Chapter 164 Section 136. The Cape & Vineyard Electric Cooperative, Inc. (“CVEC” or the “Cooperative”) goals and objectives are to develop and/or own renewable electric generation facilities and to procure and/or sell long term electric supply or other energy-related goods or services at competitive prices to help stabilize electric rates for CVEC member communities.

In some cases, CVEC takes on an expanded role for CVEC members and participants by offering consultant services.

In the case of the Oak Bluffs, CVEC is proposing to provide its services in conjunction with Sovereign Consulting Inc., with its specialty in managing capped landfills, to assist the Town of Oak Bluffs in bringing forward a microgrid to service the Oak Bluffs Wastewater Treatment Plant/Capped Landfill/Transfer Station/Highway Department Garage complex in conjunction with 2 photovoltaic installations and a battery located on-site at the complex.

## II. PROPOSAL

### A. Background

CVEC now has a portfolio of 32 solar photovoltaic (PV) projects representing a capacity of 28.5 megawatts (MW) located across Cape Cod and Martha’s Vineyard. CVEC’s success with local siting of photovoltaics has meant focused benefits for Cape Cod and Martha’s Vineyard. Under CVEC’s auspices, nine of the region’s capped landfills support solar installations which provide electricity to municipalities.

## B. Proposal

The Oak Bluffs Capped Landfill is the last suitable capped landfill on Martha's Vineyard not yet supporting a photovoltaic installation. In addition to a plan for photovoltaics, the town and CVEC wish to examine the viability of a microgrid. The proximity of the town's wastewater treatment plant, transfer station and Highway Department garage to the capped landfill presents an unparalleled opportunity for a microgrid with renewable power and storage to insure municipal service resilience during utility grid outages and to provide peak shaving savings through battery-supported curbing of power usage spikes.

CVEC, with support from Sovereign Consulting, proposes to assess the viability, costs, and benefits of a microgrid system to be installed in conjunction with the landfill PV installation and battery storage to serve the Oak Bluffs Wastewater Treatment Plant/Capped Landfill/Transfer Station/Highway Department complex.

## III. SCOPE

CVEC in conjunction with Sovereign Consulting will review nine essential aspects in preparation for a Request for Proposals for a solar/battery/microgrid solution for the Town of Oak Bluffs' Wastewater Treatment Plant/Capped Landfill/Transfer Station/Highway Department complex. With support from Sovereign Consulting, CVEC proposes to assess the viability and benefits of a microgrid system by identifying the following:

1. The energy usage of the three abutting facilities (kWh)
2. The power usage of the three abutting facilities (kW)
3. The potential production capacity from the Oak Bluffs Capped Landfill PV and solar parking canopy
4. Compliance with DEP for siting of solar on landfill
5. The distances for power runs to all facilities via microgrid
6. The location for battery and controls installation
7. The estimated battery sizing in consideration of facilities' needs for resilience and peak shaving
8. Levels of interest from all parties
9. Next steps towards RFP preparation

#### IV. COSTS

▪ Retrieve and map energy/power usage data and interval data	\$1,000
▪ Design PV for capped landfill & carport canopy	\$1,500
▪ Create database with energy needs against solar production	\$3,000
▪ Create database with power needs against battery storage	\$3,000
▪ Estimate battery sizing (from power needs and solar production)	\$3,000
▪ Provide one-line (microgrid power run, controls and battery siting)	\$2,000
▪ Review DEP documents and confirm DEP permitting	\$2,500
▪ Confirm parties' eligibility to participate	\$ 500
▪ <u>Deliver report with next steps</u>	<u>\$ 300</u>
 Total	 \$13,800

Appendix B DEMAND CHARGE FOR WASTEWATER TREATMENT PLANT - MAY 2018

EVERSOURCE

170 East 600369  
Dallas, TX 75206-0369

Account Number

K

TOWN OF OAK BLUFFS WWD  
P O BOX 1526  
OAK BLUFFS MA 02557

PAGE 6 OF 7



2828 361 9998

Wastewater Treatment Plant

RETURN THIS PORTION WITH YOUR PAYMENT. MOVING? PLEASE LET US KNOW, OTHERWISE YOU MAY BE RESPONSIBLE FOR ENERGY USE AFTER YOU MOVE.

STATEMENT ACCOUNT NUMBER:  
2828-361-9998

BILLING DATE  
MAY 25, 2018

2684-357-0016 JORDAN-CROSSING A-105C OAK BLUFFS  
04/17-05/17 317 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$33.43  
NEXTERA ENER \$30.48

AMT DUE \$63.91

2686-868-0013 174 MING RD PUMP STAT OAK BLUFFS  
04/14-05/14 990 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$91.65  
KWH CHARGES \$91.65 DEMAND \$0.00 8.9 KW  
NEXTERA ENER \$95.18

AMT DUE \$186.83

2687-122-0013 OCEAN AVE PUMP STAT OAK BLUFFS  
04/19-05/18 461 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$45.88  
NEXTERA ENER \$44.32

AMT DUE \$90.20

2690-986-0012 SCHOOL ST SEWER PUMP OAK BLUFFS  
04/14-05/14 3001 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$254.51  
KWH CHARGES \$244.81 DEMAND \$9.70 12.0 KW  
NEXTERA ENER \$288.52

AMT DUE \$543.03

\* 2697-474-0016 PENNSYLVANIA AVE SEWER OAK BLUFFS  
04/14-05/14 720 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$68.28  
KWH CHARGES \$68.28 DEMAND \$0.00 0.8 KW  
NEXTERA ENER \$69.22

AMT DUE \$137.50

2851-876-0013 91 EDGARTOWN-VH RD PUMP OAK BLUFFS  
04/14-05/14 856 KWH ACTUAL ASC .09614 RATE 33  
Eversource \$80.05  
KWH CHARGES \$80.05 DEMAND \$0.00 7.7 KW  
NEXTERA ENER \$82.30

AMT DUE \$162.35

**HOUSE . . . . . No. 4727**

**The Commonwealth of Massachusetts**

PRESENTED BY:

*Dylan Fernandes and Julian Cyr*

*To the Honorable Senate and House of Representatives of the Commonwealth of Massachusetts in General Court assembled:*

The undersigned legislators and/or citizens respectfully petition for the adoption of the accompanying bill:

An Act concerning the rental of mopeds and motor scooters in the town of Oak Bluffs.

PETITION OF:

NAME:

DISTRICT/ADDRESS:

*Dylan Fernandes*

*Barnstable, Dukes and Nantucket*

*Julian Cyr*

*Cape and Islands*

**HOUSE . . . . . No. 4727**

By Representative Fernandes of Falmouth and Senator Cyr, a joint petition (accompanied by bill, House, No. 4727) of Dylan Fernandes and Julian Cyr (by vote of the town) that the town of Oak Bluffs be authorized to further regulate the rental of mopeds and motor scooters in said town. Municipalities and Regional Government. [Local Approval Received.]

**The Commonwealth of Massachusetts**

In the One Hundred and Ninetieth General Court  
(2017-2018)

An Act concerning the rental of mopeds and motor scooters in the town of Oak Bluffs.

*Be it enacted by the Senate and House of Representatives in General Court assembled, and by the authority of the same, as follows:*

SECTION 1. Notwithstanding the provisions of G. L. c. 90, § 1B, or any other general or special law to the contrary, the Town of Oak Bluffs (the “Town”) is hereby authorized to amend Chapter XV(F) of its Recodified General By-laws (April 9, 2002), as amended through September of 2017, as set out in Section Two of this Act, to prohibit the commercial lease or rental of mopeds and motor scooters to the public.

SECTION 2. The question shall be submitted for acceptance to the voters of the Town at its next special or annual town meeting in the form of the following warrant article: “To see if the Town will vote to delete the existing text of Chapter XV(F) of its Recodified General By-laws (April 9, 2002), as amended through September of 2017, in its entirety, and replace it with the following language: ‘The rental or leasing of mopeds and motor scooters to the public is prohibited within the Town, and no license shall be issued for an entity to engage in the business of renting or leasing mopeds or motor scooters to the public.’”

SECTION 3. If a majority of the voters at the special or annual town meeting in which the article provided for in Section Two vote in the affirmative, then then this Act shall take effect, but not otherwise.

SECTION 4. Duly issued licenses in effect at the time this Act becomes effective shall remain valid for the duration of the then existing license, but shall otherwise confer no benefit or right on the holder to operate past the effective date of the existing license.