



WARRANT

For

Annual Town Meeting

April 5, 2025

Meeting begins at 9:00 a.m.

Doors open at 8:15 a.m.

Hamilton-Wenham Regional High School
Auditorium

Annual Town Election

April 10, 2025

7:00 a.m. – 8:00 p.m.

Hamilton-Wenham Recreation Gymnasium

Town By-Laws

CHAPTER II

RULES AND PROCEDURE OF TOWN MEETINGS

SECTION 1. All articles in the warrant shall be taken up in the order of their arrangement, unless otherwise decided by a two-thirds vote, except that unanimous consent shall be required for inclusion of an Article in a "Consent Motion" group of Articles that will be taken up by the meeting for voting on the group.

SECTION 2. In case of motions to amend, or to fill out blanks, the one expressing the largest sum or the longest time shall be put first, and an affirmative vote thereon shall be a negative vote on any smaller sum or shorter time.

SECTION 3. The report of a committee shall be deemed properly before a meeting if a request for its acceptance is included in an article of the warrant and a copy is published in the Special Report or is filed with the Town Clerk fifteen days prior to the meeting. A vote to accept a final report shall discharge the committee but shall not be equivalent to a vote to carry out its recommendations. A vote on recommendations included in a committee report shall only be in order under an article to that effect in the warrant. A vote to accept a report of progress shall continue the committee under its original authority unless otherwise specified.

SECTION 4. If an article of the Warrant has once been acted upon and disposed of, it shall not be again considered at the meeting except by a two-thirds vote.

SECTION 5. No money shall be appropriated from the Stabilization Fund except by a 2/3 vote at a Town Meeting.

SECTION 6. Only registered voters of the Town shall be admitted and entitled to vote at any Annual or Special meeting provided that upon prior request the Moderator may admit to the meeting persons who are not registered voters and in his discretion may permit them to speak on a subject. Any person so permitted to speak at a meeting shall announce his full name and address to the meeting.

SECTION 7. Motions at Town Meeting shall be made orally, but the Moderator may require any motion also to be submitted in writing. Unless otherwise directed thereby the Moderator shall appoint all committees created by the vote of the Town.

SECTION 8. The conduct of all Town Meetings not prescribed by law or by the foregoing rules shall be determined by the rules of practice contained in the most current edition of Town Meeting Time, A Handbook of Parliamentary Law.

SECTION 9. On matters requiring a two-thirds vote, either by statute or these By-Laws, a count need not be taken and the vote need not be recorded unless the vote declared is immediately questioned by seven or more voters as provided in General Laws, Chapter 39, Section 15.

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ESSEX, SS

TO THE CONSTABLE OF THE TOWN OF HAMILTON:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby directed to notify and warn the inhabitants of the Town of Hamilton qualified to vote in election and town affairs, to meet at the Hamilton-Wenham Regional High School Auditorium, 775 Bay Road in said town, on Saturday, the fifth day of April, in the year Two Thousand Twenty-five (April 5, 2025) at nine o'clock in the morning (9:00 a.m.), then and there to act on the following articles.

SECTION 1: ELECTIONS, REPORTS, PROCEDURES

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| <p>ARTICLE 2025/4 1-1</p> <p><i>Election of Officers</i></p> | <p>To elect the following Town and School District Officers at the Annual Town Election on Thursday, April 10, 2025 from 7:00 a.m. to 8:00 p.m. at the Hamilton-Wenham Recreation Gymnasium, located at 16 Union Street, Hamilton, Massachusetts.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Town Moderator for one year <input type="checkbox"/> Two members of the Select Board for three years <input type="checkbox"/> One member of the Board of Assessors for three years <input type="checkbox"/> Three members of the Planning Board for three years <input type="checkbox"/> One Hamilton-Wenham Public Library Trustee for three years <input type="checkbox"/> Three member of the Hamilton-Wenham Regional School Committee for three years <p>Ballot Question: Shall the Town of Hamilton be allowed to exempt from the provisions of proposition two and one-half, so-called, the amounts required to pay the Town's allocable share of the bond issued by the Hamilton-Wenham Regional School District for the purpose of paying costs of a new Cutler Elementary School at 237 Asbury St. Hamilton, MA, including the payment of all costs incidental or related thereto?</p> |
| <p>ARTICLE 2025/4 1-2</p> <p><i>Reports</i></p> | <p>To hear reports of Town Officers and selected committees and to take action thereon or relative thereto. Reports will appear in the Town Report for Fiscal Year 2024 and be posted to the Town of Hamilton website.</p> |
| <p>ARTICLE 2025/4 1-3</p> <p><i>Article for Consent Motion</i></p> | <p>To see if the Town will consolidate in one consent motion containing the motions for those articles that, in the opinion of the Moderator, are not controversial and can be passed without debate, or take any action thereon or relative thereto.</p> |

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| | <p>Expected Consent Motion to include articles: ARTICLES 2-1, 2-5, 2-6, 2-7, 2-8, 2-10, 3-1, 3-3 and 3-4.</p> |
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SECTION 2: FINANCIAL ACTIONS

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| <p>ARTICLE 2025/4 2-1</p> <p align="center"><i>Compensation/ Classification Table</i></p> | <p>To see if the Town will amend the Personnel Bylaw by adopting changes to the classification and compensation table as set forth in Appendix A, or take any action thereon or relative thereto.</p> <p>[The Proposed Compensation/Classification Table appears as Appendix A to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>The Classification/Compensation table reflects a cost of living increase for settled contracts and non-union employees. Collective Bargaining Agreements under negotiation are identified as such and do not reflect any cost of living increases. Anticipated increases are currently budgeted in a salary reserve account to accommodate for prospective increases for unsettled union contracts.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>The tax rate impact of this article is reflected in Article 2-3, the Town budget article, as the Classification/Compensation Table is only one part of a formula used to determine the various wages and salaries contained within the Town budget.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 2-2</p> <p align="center"><i>Prior Year Bills</i></p> | <p>To see if the Town will raise and appropriate, transfer from available funds, or borrow pursuant to any applicable statute, a sum of money to pay any unpaid bills incurred in prior years, or take any action thereon or relative thereto. <i>(Expected request \$15,132.73)</i></p> <p><i>A 4/5 vote is required to approve this article.</i></p> <p><i>Brief Summary:</i> <i>This article provides for payment of prior year bills which were not submitted or processed prior to the fiscal year ending on June 30, 2024.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>None, as it is anticipated that the funds will come from Free Cash.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |

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| <p>ARTICLE 2025/4 2-3</p> <p><i>General Town Departmental Appropriations</i></p> | <p>To see if the Town will raise and appropriate, or transfer from available funds, a sum of money to defray the expenses of schools and all other Town expenses for the Fiscal Year beginning July 1, 2025, or take any action thereon or relative thereto. <i>(Expected requests Town - \$15,561,181 and all educational expenses, including HWRSD and ENSATSD - \$26,153,584)</i></p> <p>[The proposed budget appears as Appendix B to the 2025 Appendix Book.] [The approved school budget appears as Appendix C to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>This article is to approve the general operating budget for the Town and Schools, which totals \$41,714,765. The total FY26 budget represents an increase of 3.70% over FY25. This article does not include the portions of the Town or School budgets that are funded in separate warrant articles.</i></p> <p><i>The HWRSD budget request represents an increase of total school spending of \$1,684,391 – an increase of 4.52% or \$856,117 for Hamilton. The Hamilton increase includes the adjustment for the enrollment shift.</i></p> <p><i>The ENSATSD budget represents an increase in total school spending of \$1,776,679 – an increase of 4.50% or \$57,242 for Hamilton. The Hamilton increase includes the adjustment for the enrollment shift.</i></p> <p><i>The Select Board recommends (5-0) favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 2-4</p> <p><i>Capital Expenditures</i></p> | <p>To see if the Town will raise and appropriate, borrow or transfer from available funds a sum of money for the purpose of funding capital expenditures and further, to authorize the Town Manager to administer and expend funds from said accounts, or take any action thereon or relative thereto. <i>(Expected request \$852,125)</i></p> <p><i>Brief Summary:</i> <i>This article would provide funds for various projects contained within the Fiscal Year 2026 Capital Projects Plan.</i></p> <p>[Please refer to Appendix D to the 2025 Appendix Book.]</p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>None. It is expected that Free Cash and Water Enterprise Retained Earnings will be utilized for these appropriations; therefore, this will have no impact on the FY2026 tax rate.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 2-5</p> <p><i>Water Enterprise Budget</i></p> | <p>To see if the Town will approve the FY2026 Water Enterprise Budget, as set forth in Appendix E, or take any action thereon or relative thereto. <i>(Expected request \$2,514,566)</i></p> <p>[The proposed budget appears as Appendix E to the 2025 Appendix Book.]</p> |

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| | <p>Brief Summary: <i>The FY26 operating budget for the Water Enterprise represents an increase of \$194,588 or 8.39%. Retained earnings were not used to balance the operating budget this year.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>The Water Department is supported by water fees; adoption of the budget will not impact the tax rate.</i></p> <p>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</p> |
| <p>ARTICLE 2025/4 2-6</p> <p><i>Annual Financial Actions</i></p> | <p>To see if the Town will authorize the following financial actions, or take any action thereon or relative thereto.</p> <ul style="list-style-type: none"> A. To transfer \$2,000 from the Cemetery Sale of Lots and Graves Fund to the General Fund to be used for cemetery purposes; B. To transfer \$519,659 from the Water Enterprise Fund to the General Fund to be used for indirect expenses; C. To transfer \$9,213 from the interest of the Clark Fund to the Conservation Trust fund for conservation related expenses. <p>Brief Summary: <i>This article occurs annually as part of the budget process.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>The proposed transfers will reduce the estimated tax rate by approximately \$0.19 per \$1,000 assessed valuation, or \$155 tax assessment on the average home valued at \$816,000.</i></p> <p>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</p> |
| <p>ARTICLE 2025/4 2-7</p> <p><i>Hamilton Development Corporation</i></p> | <p>To see if the Town will raise and appropriate the sum of \$78,702 to the Hamilton Development Corporation, or take any action thereon or relative thereto. <i>(Expected request is \$78,702)</i></p> <p>Brief Summary: <i>At the 2010 Annual Town Meeting, the Town accepted the provisions of M.G.L. c.64L, Section 2(a) to impose a local meals excise tax. At the same meeting, the Town approved that such funds were to be used for the purpose of supporting economic development in the downtown commercially zoned district.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>None. The Meals tax is paid by residents of other towns as well as our own to restaurants and collected by the Commonwealth, per Mass General Law. The amounts collected are returned in their entirety to the Town exclusively for the benefit of downtown economic development and this warrant article transfers those funds to the Hamilton Development Corporation for that purpose.</i></p> <p>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</p> |

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| <p>ARTICLE 2025/4 2-8</p> <p><i>OPEB Trust Fund</i></p> | <p>To see if the Town will transfer \$125,000 from Free Cash for the purpose of funding the Other Post-Employment Benefits (OPEB) Liability Trust Fund, or take any action thereon or relative thereto.</p> <p>Brief Summary: <i>This article proposes to appropriate \$125,000 towards the Town’s unfunded liability for health and life insurance benefits of both current and future retired employees. Appropriations for this liability were first made at the 2010 Annual Town Meeting. Governmental Accounting Standards requires all local governments to account for other post-employment benefits (OPEB) using an accrual methodology over participants’ active working career. The Town’s most recent actuarial study (as of July 1, 2023) indicated that the Town had an actuarially determined OPEB liability of approximately \$5.7 million. The Town has already set aside approximately \$1,473,406 for this long-term liability.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>None, as it is anticipated that the funds will come from Free Cash.</i></p> <p>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</p> |
| <p>ARTICLE 2025/4 2-9</p> <p><i>Capital Stabilization Fund</i></p> | <p>To see if the Town will transfer \$235,000 from Free Cash to the Capital Stabilization Fund, or take any action thereon or relative thereto. <i>(Expected request is \$235,000)</i></p> <p>Brief Summary: <i>This article requests an appropriation to be added to the Capital Stabilization Fund.</i></p> <p><i>A 2/3 vote is required to approve this Article pursuant to Chapter II, Section 5 of the Town’s General Bylaws.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>None, as it is anticipated that the funds will come from Free Cash.</i></p> <p>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</p> |
| <p>ARTICLE 2025/4 2-10</p> <p><i>Community Preservation Budget</i></p> | <p>To see if the Town will act on the Report of the Community Preservation Committee on the Fiscal Year 2026 Community Preservation Budget and specified other projects and appropriate or reserve for later appropriation monies from community preservation fund annual revenues, specific reserves or other available funds for the administrative expenses of the Community Preservation Committee, the payment of debt service, the undertaking of community preservation projects and all other necessary and proper expenses for the year, as set forth in Appendix F, or take any action thereon or relative thereto.</p> <p>[The Budget appears in Appendix F of the 2025 Appendix Book.]</p> |

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| | <p>Brief Summary: <i>The Community Preservation Budget annually supports many requests made by different groups and organizations each year. This article seeks to transfer funds collected by the Community Preservation surcharge and assign those funds to specific uses for the coming year. Those uses include:</i></p> <p><i>\$30,295 for Administrative Expenses line</i> <i>\$102,100 for debt service in the Open Space and Recreation line</i> <i>\$340,650 for debt service in Historic Preservation line</i> <i>\$70,00 to be transferred to the Community Housing line</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>The Community Preservation Budget is funded from a 2% surcharge on to the property tax plus State matching funds. This is noted as a separate line item on your tax bill.</i></p> <p>The Select Board recommends favorable action (5-0). The CPC recommends favorable action (6-0). The Finance and Advisory Committee (4-0) recommends favorable action.</p> |
| <p>ARTICLE 2025/4 2-11</p> <p><i>HWRSD Consolidated Elementary School Project</i></p> | <p>To see if the Town will approve the \$142,266,034 borrowing authorized by the Hamilton-Wenham Regional School District, for the purpose of paying costs for designing, constructing, and equipping a new Cutler Elementary School at 237 Asbury Street, Hamilton, MA, including the payment of all costs incidental or related thereto (the “Project”), which school facility shall have an anticipated useful life as an educational facility for the instruction of school children of at least 50 years, and for which the District may be eligible for a school construction grant from the Massachusetts School Building Authority (“MSBA”), said amount to be expended at the direction of the Hamilton-Wenham School Building Committee. The MSBA’s grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and any Project costs the District incurs in excess of any grant approved by and received from the MSBA shall be the sole responsibility of the District and its member municipalities. Any grant that the District may receive from the MSBA for the Project shall not exceed the lesser of (1) fifty-one point twenty-eight percent (51.28%) of eligible, approved project costs, as determined by the MSBA, or (2) the total maximum grant amount determined by the MSBA, or take any action thereon or relative thereto.</p> <p><i>A 2/3 vote is required to approve this article.</i></p> <p>Brief Summary: <i>This article seeks to approve a borrowing authorized by the Hamilton-Wenham Regional School District for the new Cutler Elementary School project. The Hamilton Finance and Advisory Committee is expected to make a presentation about the potential tax impacts of this question on the floor of Town Meeting. The article above states that the MSBA is projected to cover 51.28% of allowable project costs that would be equal to 35% of total project costs.</i></p> <p>Fiscal Year 2026 Tax Rate Impact: <i>If approved and also approved at Town</i></p> |

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| | <p><i>Meeting in Wenham and approved by both towns ballot questions, the costs of the new school would be added to future years tax bills as a debt-exclusion and would be in addition to taxes authorized for the annual operating budgets.</i></p> <p><i>The Select Board (4-1) recommends favorable action. The Finance and Advisory Committee (3-1) recommends favorable action. The HWRSD Committee voted (5-1) to authorize the borrowing for this project.</i></p> |
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SECTION 3: OTHER APPROPRIATIONS AND ACTIONS

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| <p>ARTICLE 2025/4 3-1</p> <p><i>HERO Act</i></p> | <p>To see if the Town will vote to accept General Laws Chapter 59, Section 5, Clause 22I, which authorizes an annual increase in the amount of the exemption granted under General Laws Chapter 59, Section 5, Clause 22, Clause 22A, Clause 22B, Clause 22C, Clause 22E and Clause 22F by the percentage increase in the U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index (CPI) for the previous year as determined by the Commissioner of Revenue, to be effective for applicable exemptions granted for any fiscal year beginning on or after July 1, 2025, or take any action thereon or relative thereto.</p> <p><i>Brief Summary:</i> <i>This article seeks to offer an increase in the annual amount that qualifying veterans receive who apply for veterans exemptions under clauses outlined in General Laws Chapter 59, Section 5. Local veterans are required to apply annually for the exemptions through the Assessors' Office to receive abatements.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>Adoption of this new provision is not expected to have any material impact on the tax rate, as the Assessors will use the Assessors' Overlay account to fund any abatements.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 3-2</p> <p><i>Extension of Lease Cutler School</i></p> | <p>To see if the Town will vote to authorize the Select Board to extend a lease with the Hamilton-Wenham Regional School District for the Cutler Elementary School, located at 237 Asbury Street, Hamilton, MA, and identified on Assessor's Map 47, Lot 150, for an additional term of 50 years on such terms and conditions as the Select Board deems to be in the best interests of the Town, and further, to authorize the Select Board to execute any and all documents to carry out the purposes of this article, or take any action thereon or relative thereto.</p> <p><i>Brief Summary:</i> <i>This article seeks to authorize the Select Board to extend the existing lease with the Hamilton-Wenham Regional School District for the Cutler Elementary School for an additional 50 year term.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>None.</i></p> |

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| | <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 3-3</p> <p><i>Recreation Revolving Fund – Establish New Spending Limit</i></p> | <p>To see if the Town will vote to establish the annual spending limit for the Recreation Revolving Fund at \$825,000 in accordance with G.L. c.44, §53E ½, with such updated expenditure limit to be applicable for each fiscal year until such time as Town Meeting votes prior to July 1 in any year, to increase the same for the ensuing fiscal year, provided that at the request of the entity authorized to expend such funds the Select Board may increase such limit for that fiscal year only; or take any action thereon or relative thereto.</p> <p><i>Brief Summary:</i> <i>This Article seeks to increase the annual spending limit for the Recreation Revolving Fund, which is currently set at \$750,000. The fund utilizes user fees to provide the programming, and no tax revenue is expended.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>None.</i></p> <p><i>The Select Board recommends favorable action (5-0). The Finance and Advisory Committee (4-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 3-4</p> <p><i>Acquisition of Easements – Woodbury Street</i></p> | <p>To see if the Town will vote to authorize the Select Board to acquire, by gift, purchase, eminent domain or otherwise, permanent and temporary easements in the property located at 12 Woodbury Street, Hamilton, MA, as further described as Assessors’ Map 69, Lot 45, as shown on the Plan entitled, “Interim Hamilton-Wenham System Interconnection,” on file with the Town Clerk’s Office, for the purpose of siting a water pump station and related infrastructure, on such terms and conditions as the Select Board deems to be in the best interests of the Town; and further, to authorize the Select Board to execute any and all documents to carry out the purposes of this article, or take any action thereon or relative thereto.</p> <p><i>Brief Summary:</i> <i>This article seeks to authorize the Select Board to acquire temporary and permanent easements at 12 Woodbury Road for the purpose of constructing a water pump station and related infrastructure.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact:</i> <i>None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (3-0) recommends favorable action.</i></p> |

SECTION 4: ZONING BYLAW AMENDMENTS

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| <p>ARTICLE 2025/4 4-1</p> <p align="center"><i>Zoning Bylaw Amendment – Groundwater Protection Overlay District</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 9.1.4, Groundwater Protection Overlay District, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as set forth below, or take any action thereon or relative thereto.</p> <p>9.1.4 Dimensional Requirements. Regardless of the minimum Lot size of the underlying zone, there shall be a minimum lot area of eighty thousand (80,000) square feet for a building Lot per dwelling unit in the GPOD. See Section 4.0 for Computation of Lot Area.</p> <p><i>Brief Summary: This article seeks to promote the goals of the Groundwater Protection Overlay District (GPOD) by amending the requirement for a minimum of 80,000 square-feet per building Lot to instead require a minimum of 80,000 square-feet per dwelling unit. The purpose of the amendment is to reduce density in the GPOD to protect groundwater resources from seepage correlational with the volume of effluent generated by each dwelling unit.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None</i></p> <p><i>The Select Board (2-1-2) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-2</p> <p align="center"><i>Zoning Bylaw Amendment – Temporary Signage</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 6.3.5, Signs, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as set forth below, or take any action thereon or relative thereto.</p> <p>6.3.5.4. <u>Temporary Signage</u>: Signs in place for no more than two months in any calendar year. For two months Pprior to any national, state, or local election and for one week thereafter, there may be up to five (5) lawn signs per lot.</p> <p><i>Brief Summary: This article seeks to amend the definition of Temporary Signage to eliminate potential conflicts with First Amendment protections by eliminating time constraints on protected speech conveyed on temporary signs.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |

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| <p>ARTICLE 2025/4 4-3</p> <p><i>Zoning Bylaw Amendment – Definitions</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 11.0, Definitions, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as set forth below, or take any action thereon or relative thereto.</p> <p>Gross Floor Area, Business: The floor area within the perimeter of the outside walls of the building under consideration, without deduction for hallways <u>corridors</u>, stairs <u>stairways, ramps</u>, closets, thickness of <u>interior</u> walls, columns, or other features. <u>The floor area of a building, or portion thereof, not provided with surrounding exterior walls shall be the usable area under the horizontal projection of the roof or floor above. The gross floor area shall not include shafts with no openings or interior courts.</u></p> <p>Gross Floor Area, Residential: The area of a residential structure used for living space, excluding basement and attic area. <u>Except for the definition of gross floor area applicable to Accessory Dwelling Units, the sum of the areas of all floors of the building, including basements, cellars, mezzanine and intermediate floored tiers and penthouses of headroom height, measured from the exterior faces of exterior walls from the centerline of walls separating buildings, but excluding:</u></p> <ol style="list-style-type: none"> <u>1. Covered walkways, open roofed-over areas, porches and similar spaces.</u> <u>2. Pipe trenches, exterior terraces or steps, chimneys, roof overhangs and similar features.</u> <p><i>Brief Summary: This article seeks to amend the definitions for Gross Floor Area, Business; and Gross Floor Area, Residential at the request of the Building Commissioner for greater clarity and consistency with the State Building Code.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-4</p> <p><i>Zoning Bylaw Amendment – Use Regulations / Large Accessory Dwelling Units</i></p> | <p>To see if the Town will amend the Hamilton Zoning Bylaw Sections 3.1.2, 3.4, and Section 11.0, relative to Use Regulations and Definitions, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as shown in Appendix G-1, and to authorize the Town Clerk to accomplish any necessary renumbering, or take any action thereon or relative thereto.</p> <p>[The proposed Zoning Bylaw amendments appear as Appendix G-1 to the 2025 Appendix Book.]</p> <p><i>Brief Summary: This article seeks to define Large Accessory Dwelling Units and permits them by Special Permit only, eliminates obsolete and unused</i></p> |

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| | <p><i>sections of the Zoning Bylaw related to accommodations for Temporary Additional Living Area (Section 3.4), and updates the Table of Use Regulations and Definitions to account for the proposed amendments.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-5</p> <p><i>Zoning Bylaw Amendment – Accessory Dwelling Units By Right</i></p> | <p>To see if the Town with amend the Hamilton Zoning Bylaw Sections 3.1.2, 3.6 and 11.0, relative to Accessory Apartments and Definitions, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as shown in Appendix G-2, and to authorize the Town Clerk to accomplish any necessary renumbering, or take any action thereon or relative thereto.</p> <p>[The proposed Zoning Bylaw amendments appear as Appendix G-2 to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>This article seeks to amend regulations related to Accessory Dwelling Units necessitated by the passage of the Affordable Homes Act, which became effective on February 2, 2025. Consistent with the requirements of the new state law, this article permits one Accessory Dwelling Unit (ADU) “as of right” on every lot containing a Principal Dwelling Unit provided that certain requirements are met. This article also amends the definition of ADU for consistency with the definition promulgated by the state and updates the Table of Use Regulations to account for the proposed amendments.</i></p> <p><i>A majority vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-6</p> <p><i>Zoning Bylaw Amendment – Inclusionary Housing</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 8.3, Inclusionary Housing, by deleting the language shown in strikethrough and inserting the language shown in bold underline, as shown in Appendix H, or take any action thereon or relative thereto.</p> <p>[The proposed Zoning Bylaw amendments appear as Appendix H to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>This article seeks to amend the provisions of the Inclusionary Housing Bylaw by deleting obsolete references, updating</i></p> |

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| | <p><i>terminology, and adding a requirement that affordable housing units created under the Bylaw be deed restricted as affordable in perpetuity. The article also clarifies requirements related to the calculation of both the minimum number of affordable housing units required and the payment of a fee in lieu of providing affordable housing on-site.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-7</p> <p><i>Zoning Bylaw Amendment – Site Plan Review</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 10.6, Site Plan Review, and Section 11.0, Definitions, by deleting the language shown in strikethrough and inserting the language shown in bold and underline, as shown in Appendix I, or take any action thereon or relative thereto.</p> <p>[The proposed Zoning Bylaw amendments appear as Appendix I to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>This article seeks to strike and replace the existing Site Plan Review Bylaw with a new section under the same title for the purpose of updating and clarifying the Town’s requirements for Site Plan Review Applications and to shift ministerial requirements for those application submission contents to Site Plan Review Regulations.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee (4-0) recommends favorable action. The Planning Board (7-0) recommends favorable action.</i></p> |
| <p>ARTICLE 2025/4 4-8</p> <p><i>Zoning Bylaw Amendment – Flood Plain Overlay District</i></p> | <p>To see if the Town will amend the Town of Hamilton Zoning Bylaw Section 9.2, Flood Plain Overlay District, and Section 11.0, Definitions, by deleting the language shown in strikethrough and inserting the language shown in bold and underline, as shown in Appendix J, or take any action thereon or relative thereto.</p> <p>[The proposed Zoning Bylaw amendments appear as Appendix J to the 2025 Appendix Book.]</p> <p><i>Brief Summary:</i> <i>This article seeks to amend provisions related to flood plains and associated uses, requirements, administration, and definitions, and to replace the existing Flood Insurance Rate Maps with new maps provided by the Federal Emergency Management Agency (FEMA). The purpose of this amendment is to ensure conformance with the recently updated Essex County</i></p> |

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| | <p><i>Flood Insurance Study and FEMA Flood Insurance Rate Maps.</i></p> <p><i>A 2/3 vote is required to approve this Article.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None</i></p> <p><i>The Select Board (5-0) recommends favorable action. The Finance and Advisory Committee(3-0) recommends favorable action and Planning Board will be provided at Town Meeting.</i></p> |
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SECTION 5: CITIZENS' PETITIONED ARTICLES

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| <p>ARTICLE 2025/4 5-1</p> <p><i>Citizens' Petition</i></p> | <p>Should the Hamilton-Wenham Regional School District (and the Towns of Hamilton and Wenham and all relevant boards and committees): (i) permanently abandon their plans and efforts with respect to the consolidation of any or all elementary schools in the District; and (ii) pursue and use the resources available to them, including any future financial awards or grants from the Massachusetts School Building Authority, to renovate, maintain and/or repair the Buker, Winthrop, and Cutler schools in their current locations.</p> <p>___ Yes ___ No</p> <p><i>Brief Summary: This article was submitted as a non-binding advisory question seeking to determine whether Town Meeting supports a consolidated elementary school or the renovation, maintenance and/or repair of the existing Buker, Winthrop and Cutler Elementary Schools.</i></p> <p><i>Fiscal Year 2026 Tax Rate Impact: None.</i></p> <p><i>The Select Board (5-0) voted to make no recommendation on this article. The Finance and Advisory Committee (4-0) voted to make no recommendation on this article.</i></p> |
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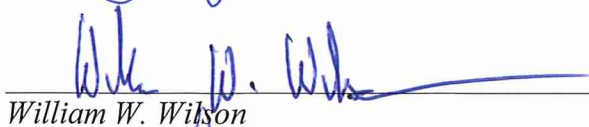
ADJOURNMENT

Given under our hands this 24 day of March, 2025.

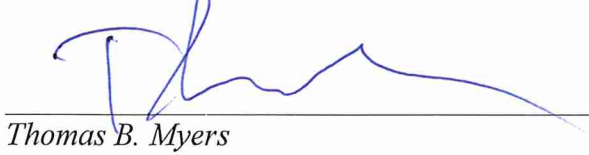
HAMILTON SELECT BOARD



Caroline Q. Beaulieu, Chair

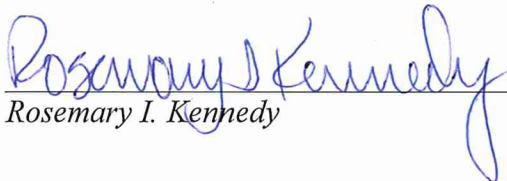


William W. Wilson



Thomas B. Myers

William A. Olson



Rosemary I. Kennedy

Hamilton, Massachusetts

I have this day served this warrant as directed by Chapter 1, Section 1b of the Town By-laws.

Constable, Town of Hamilton

Date

965715/HAML/0001

**BULK RATE
U.S. POSTAGE PAID
PERMIT #24
HAMILTON, MA
01936**

POSTAL PATRON

Visit our website at www.hamiltonma.gov

Please join us

Saturday, April 5, 2025

ANNUAL TOWN MEETING

***Hamilton-Wenham Regional High School
Auditorium***

9:00 a.m.

DEMOCRACY IS NOT A SPECTATOR SPORT

Please bring this warrant with you to the Town Meeting. Thank you.

**APPENDIX A
COMPENSATION / CLASSIFICATION TABLE
FISCAL YEAR 2026**

Wage Grid

Note # = See footnote - end of Compensation Table

| Exempt Positions - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026 | | | | | | | | | | |
|--|----|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | | Steps | | | | | | | | |
| Grade | | I | II | III | IV | V | VI | VII | VIII | |
| | 22 | Director of Public Works (40 Hrs.) | \$ 129,321.71 | \$ 131,908.14 | \$ 134,546.31 | \$ 137,237.23 | \$ 139,981.98 | \$ 142,781.61 | \$ 145,637.25 | \$ 148,549.99 |
| | 21 | Director of Planning & Development (40 Hrs.) | \$ 118,626.60 | \$ 120,988.44 | \$ 123,417.12 | \$ 125,890.36 | \$ 128,408.17 | \$ 130,970.54 | \$ 133,599.76 | \$ 136,271.75 |
| | 20 | Assistant DPW Director (40Hrs.) | \$ 111,347.34 | \$ 113,574.28 | \$ 115,845.76 | \$ 118,162.68 | \$ 120,525.94 | \$ 122,936.45 | \$ 125,395.19 | \$ 127,903.09 |
| 10 | 20 | Human Resources Director (40 Hrs.) | \$ 111,347.34 | \$ 113,574.28 | \$ 115,845.76 | \$ 118,162.68 | \$ 120,525.94 | \$ 122,936.45 | \$ 125,395.19 | \$ 127,903.09 |
| | 18 | Town Accountant (40 Hrs.) | \$ 101,558.98 | \$ 103,586.60 | \$ 105,658.78 | \$ 107,775.52 | \$ 109,936.82 | \$ 112,142.68 | \$ 114,393.12 | \$ 116,680.98 |
| 10 | 18 | Building Commissioner (40 Hrs.) | \$ 101,558.98 | \$ 103,586.60 | \$ 105,658.78 | \$ 107,775.52 | \$ 109,936.82 | \$ 112,142.68 | \$ 114,393.12 | \$ 116,680.98 |
| | 18 | Director of Assessors (40 Hrs.) | \$ 101,558.98 | \$ 103,586.60 | \$ 105,658.78 | \$ 107,775.52 | \$ 109,936.82 | \$ 112,142.68 | \$ 114,393.12 | \$ 116,680.98 |
| 1 | 18 | Treasurer-Collector (40 Hrs.) | \$ 101,558.98 | \$ 103,586.60 | \$ 105,658.78 | \$ 107,775.52 | \$ 109,936.82 | \$ 112,142.68 | \$ 114,393.12 | \$ 116,680.98 |
| | 18 | Director of Health & Human Services (24 Hrs.) | \$ 60,935.39 | \$ 62,151.96 | \$ 63,395.27 | \$ 64,665.31 | \$ 65,962.09 | \$ 67,285.61 | \$ 68,635.87 | \$ 70,008.59 |
| 10 | 17 | Recreation Director (40 Hrs.) | \$ 95,387.02 | \$ 97,303.23 | \$ 99,241.71 | \$ 101,224.76 | \$ 103,252.38 | \$ 105,324.56 | \$ 107,441.30 | \$ 109,590.12 |
| 1 | 16 | Town Clerk (Elected - Salary based on 40 Hrs.) | \$ 92,557.27 | \$ 94,406.63 | \$ 96,300.56 | \$ 98,216.76 | \$ 100,177.54 | \$ 102,182.87 | \$ 104,232.76 | \$ 106,317.41 |
| | 13 | Director of Health & Human Services (40 Hrs.) | \$ 87,387.97 | \$ 89,125.92 | \$ 90,908.44 | \$ 92,735.52 | \$ 94,584.88 | \$ 96,478.81 | \$ 98,417.30 | \$ 100,385.64 |
| 10 | 12 | Conservation Agent (40 Hrs.) | \$ 80,923.75 | \$ 82,538.35 | \$ 84,196.01 | \$ 85,875.19 | \$ 87,618.96 | \$ 89,362.73 | \$ 91,149.55 | \$ 92,979.43 |

| Hourly Positions - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026 | | | | | | | | | | |
|--|----|---|-----------|------------|-----------|----------|-----------|------------|-------------|----------|
| | | Steps | | | | | | | | |
| Grade | | I | II | III | IV | V | VI | VII | VIII | |
| | | Public Health Nurse (19 Hrs.) | \$ 60.00 | | | | | | | |
| | 11 | Sealer of Weights & Measures (<19 Hrs.) | \$ 37.25 | \$ 37.99 | \$ 38.75 | \$ 39.53 | \$ 40.31 | \$ 41.12 | \$ 41.95 | \$ 42.79 |
| | 10 | Asst. to the Town Manager/CPA Coordinator (37.5 Hrs.) | \$ 34.81 | \$ 35.50 | \$ 36.21 | \$ 36.94 | \$ 37.67 | \$ 38.43 | \$ 39.20 | \$ 39.98 |
| 7 | 10 | Energy Manager (<19 Hrs.) | \$ 34.81 | \$ 35.50 | \$ 36.21 | \$ 36.94 | \$ 37.67 | \$ 38.43 | \$ 39.20 | \$ 39.98 |
| | 10 | Assistant Treasurer/Collector (40 Hrs.) | \$ 34.81 | \$ 35.50 | \$ 36.21 | \$ 36.94 | \$ 37.67 | \$ 38.43 | \$ 39.20 | \$ 39.98 |
| | 10 | Assistant Assessor (40 Hrs.) | \$ 34.81 | \$ 35.50 | \$ 36.21 | \$ 36.94 | \$ 37.67 | \$ 38.43 | \$ 39.20 | \$ 39.98 |
| | 10 | Grants & Communication Coordinator (24 Hrs.) | \$ 34.81 | \$ 35.50 | \$ 36.21 | \$ 36.94 | \$ 37.67 | \$ 38.43 | \$ 39.20 | \$ 39.98 |
| | 8 | Health Inspector (<19 Hrs.) | \$ - | \$ - | \$ 30.96 | \$ 31.58 | \$ 32.21 | \$ 32.85 | \$ 33.50 | \$ 34.19 |
| | 8 | Reserve Patrolman | \$ 30.96 | \$ 31.58 | \$ 32.21 | | | | | |
| | 7 | Information/Media Specialist (<19 Hrs.) | \$ 27.53 | \$ 28.08 | \$ 28.64 | \$ 29.22 | \$ 29.80 | \$ 30.40 | \$ 31.01 | \$ 31.62 |
| | 7 | Social Services Specialists (<19 Hrs.) | \$ 27.53 | \$ 28.08 | \$ 28.64 | \$ 29.22 | \$ 29.80 | \$ 30.40 | \$ 31.01 | \$ 31.62 |
| | 7 | Emergency Center Dispatcher (P/T) | \$ 27.53 | \$ 28.08 | \$ 28.64 | | | | | |
| | 4 | Clerk/Typist (<19 Hrs.) | \$ 19.01 | \$ 19.40 | \$ 19.78 | \$ 20.18 | \$ 20.59 | \$ 20.99 | \$ 21.41 | \$ 21.84 |
| | | Matron | \$ 22.44 | \$ 23.79 | \$ 25.21 | \$ 26.72 | | | | |

Collective Bargaining Unions - Hourly Compensation Tables Established by Labor Unit Contract

| Administrative Assistant Union - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026 | | | | | | | | | | |
|--|---|---|-----------|------------|-----------|----------|-----------|------------|-------------|----------|
| | | Steps | | | | | | | | |
| Grade | | I | II | III | IV | V | VI | VII | VIII | |
| | | <i>7/1/25 - (existing contract expires 6/30/27)</i> | | | | | | | | |
| | 6 | Administrative Assistant | \$ 26.85 | \$ 27.38 | \$ 27.92 | \$ 28.48 | \$ 29.05 | \$ 29.64 | \$ 30.23 | \$ 30.83 |
| | 7 | Administrative Assistant | \$ 27.81 | \$ 28.37 | \$ 28.93 | \$ 29.51 | \$ 30.10 | \$ 30.71 | \$ 31.32 | \$ 31.94 |
| | 8 | Administrative Assistant | \$ 28.80 | \$ 29.38 | \$ 29.97 | \$ 30.57 | \$ 31.18 | \$ 31.81 | \$ 32.44 | \$ 33.09 |

| DPW Union - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026 | | | | | | | | | | |
|---|----|---|-----------|------------|-----------|----------|-----------|------------|-------------|----------|
| | | Steps | | | | | | | | |
| Grade | | I | II | III | IV | V | VI | VII | VIII | |
| | | <i>7/1/25 (existing contract expires 6/30/27)</i> | | | | | | | | |
| | 12 | Supervisor | \$ 38.91 | \$ 39.68 | \$ 40.48 | \$ 41.29 | \$ 42.12 | \$ 42.96 | \$ 43.82 | \$ 44.70 |
| | 9 | Foreman | \$ 32.52 | \$ 33.17 | \$ 33.84 | \$ 34.52 | \$ 35.20 | \$ 35.90 | \$ 36.63 | \$ 37.35 |
| | 9 | Primary Utility Operator | \$ 32.52 | \$ 33.17 | \$ 33.84 | \$ 34.52 | \$ 35.20 | \$ 35.90 | \$ 36.63 | \$ 37.35 |
| | 8 | Secondary Utility Operator | \$ 30.96 | \$ 31.58 | \$ 32.21 | \$ 32.85 | \$ 33.51 | \$ 34.18 | \$ 34.87 | \$ 35.56 |
| | 8 | Jr. Mechanic | \$ 30.96 | \$ 31.58 | \$ 32.21 | \$ 32.85 | \$ 33.51 | \$ 34.18 | \$ 34.87 | \$ 35.56 |
| | 7 | Heavy Equipment Operator | \$ 27.53 | \$ 28.08 | \$ 28.64 | \$ 29.20 | \$ 29.79 | \$ 30.39 | \$ 31.00 | \$ 31.62 |
| | 6 | Truck Driver/Laborer | \$ 26.60 | \$ 27.14 | \$ 27.68 | \$ 28.23 | \$ 28.80 | \$ 29.38 | \$ 29.97 | \$ 30.57 |
| | 6 | Building Custodian | \$ 26.60 | \$ 27.14 | \$ 27.68 | \$ 28.23 | \$ 28.80 | \$ 29.38 | \$ 29.97 | \$ 30.57 |

| Firefighter Union - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026 | | | | | | | | | | |
|---|--|---|-----------|------------|-----------|----------|-----------|------------|-------------|----------|
| | | Steps | | | | | | | | |
| Grade | | I | II | III | IV | V | VI | VII | VIII | |
| | | <i>7/1/25 (existing contract expires 6/30/27)</i> | | | | | | | | |
| | | Firefighter/EMT | \$ 32.67 | \$ 33.33 | \$ 33.99 | \$ 34.67 | \$ 35.37 | \$ 36.07 | \$ 36.79 | \$ 37.53 |
| | | Senior Firefighter/EMT | \$ 33.01 | \$ 33.67 | \$ 34.34 | \$ 35.02 | \$ 35.73 | \$ 36.44 | \$ 37.17 | \$ 37.91 |
| | | Lieutenant/EMT | \$ 38.28 | \$ 39.05 | \$ 39.84 | \$ 40.63 | \$ 41.44 | \$ 42.27 | \$ 43.12 | \$ 43.98 |
| | | Captain/EMT | \$ 44.87 | \$ 45.76 | \$ 46.68 | \$ 47.61 | \$ 48.56 | \$ 49.54 | \$ 50.52 | \$ 51.53 |
| | | Lieutenant/Fire Prevention/EMT | \$ 40.48 | \$ 41.29 | \$ 42.11 | \$ 42.96 | \$ 43.82 | \$ 44.69 | \$ 45.59 | \$ 46.50 |
| | | Captain/Fire Prevention/EMT | \$ 47.06 | \$ 48.00 | \$ 48.96 | \$ 49.94 | \$ 50.94 | \$ 51.96 | \$ 52.99 | \$ 54.06 |
| | | On-Call Stipend (per night) | \$ 25.00 | | | | | | | |

**APPENDIX A
COMPENSATION / CLASSIFICATION TABLE
FISCAL YEAR 2026**

Police Union - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026

| 7/1/25 (existing contract expires 6/30/27) | | Steps | | | | | |
|--|--------------------|----------|----------|----------|----------|----------|----------|
| PATROLMAN | | I | II | III | IV | V | VI |
| Upon completion of years of service | | 0 | 2 yrs. | 4 yrs. | 6 yrs. | 8 yrs. | 10 yrs. |
| Employees Hired Prior to 7/1/2010 | | | | | | | |
| 1, 3 | W/O College Degree | \$ 31.32 | \$ 32.49 | \$ 33.32 | \$ 34.10 | \$ 34.93 | \$ 36.23 |
| 1, 3 | BA/BS | \$ 37.60 | \$ 38.99 | \$ 39.97 | \$ 40.92 | \$ 41.92 | \$ 43.48 |
| 1, 3 | MA/MS | \$ 39.17 | \$ 40.62 | \$ 41.65 | \$ 42.63 | \$ 43.66 | \$ 45.28 |
| Employees Hired After 7/1/2010 | | | | | | | |
| 1, 3 | W/O College Degree | \$ 31.32 | \$ 32.49 | \$ 33.32 | \$ 34.10 | \$ 34.93 | \$ 36.23 |
| 1, 3 | BA/BS | \$ 34.48 | \$ 35.75 | \$ 36.65 | \$ 37.53 | \$ 38.43 | \$ 39.86 |
| 1, 3 | MA/MS | \$ 39.17 | \$ 40.62 | \$ 41.65 | \$ 42.63 | \$ 43.66 | \$ 45.28 |

| SERGEANT | | Steps | | | | | |
|--|-------|----------|----------|----------|----------|----------|----------|
| | | I | II | III | IV | V | VI |
| Upon completion of years of service | | 0 | 2 yrs. | 4 yrs. | 6 yrs. | 8 yrs. | 10 yrs. |
| Employees Hired Prior to 7/1/2010 | | | | | | | |
| | BA/BS | \$ 44.37 | \$ 46.01 | \$ 47.16 | \$ 48.29 | \$ 49.47 | \$ 51.31 |
| | MA/MS | \$ 46.22 | \$ 47.93 | \$ 49.15 | \$ 50.30 | \$ 51.52 | \$ 53.43 |
| Employees Hired After 7/1/2010 | | | | | | | |
| | BA/BS | \$ 40.69 | \$ 42.19 | \$ 43.25 | \$ 44.29 | \$ 45.35 | \$ 47.03 |
| | MA/MS | \$ 46.22 | \$ 47.93 | \$ 49.15 | \$ 50.30 | \$ 51.52 | \$ 53.43 |

| LIEUTENANT | | Steps | | | | | |
|--|-------|----------|----------|----------|----------|----------|----------|
| | | I | II | III | IV | V | VI |
| Upon completion of years of service | | 0 | 2 yrs. | 4 yrs. | 6 yrs. | 8 yrs. | 10 yrs. |
| Employees Hired Prior to 7/1/2010 | | | | | | | |
| | BA/BS | \$ 48.81 | \$ 50.61 | \$ 51.88 | \$ 53.12 | \$ 54.42 | \$ 56.44 |
| | MA/MS | \$ 50.84 | \$ 52.72 | \$ 54.07 | \$ 55.33 | \$ 56.67 | \$ 58.77 |
| Employees Hired After 7/1/2010 | | | | | | | |
| | BA/BS | \$ 44.76 | \$ 46.41 | \$ 47.58 | \$ 48.72 | \$ 49.89 | \$ 51.73 |
| | MA/MS | \$ 50.84 | \$ 52.72 | \$ 54.07 | \$ 55.33 | \$ 56.67 | \$ 58.77 |

Police & Fire Signal Operator Union - COLA increases take effect 7/1/2025; Step increases take effect 1/1/2026

| 7/1/26 (existing contract expires 6/30/27) | | Steps | | | | | | | |
|--|--------------|----------|----------|----------|----------|----------|----------|----------|----------|
| Grade | | I | II | III | IV | V | VI | VII | VIII |
| 4 | 7 Dispatcher | \$ 27.54 | \$ 28.10 | \$ 28.66 | \$ 29.22 | \$ 29.81 | \$ 30.41 | \$ 31.01 | \$ 31.63 |

**APPENDIX A
COMPENSATION / CLASSIFICATION TABLE
FISCAL YEAR 2026**

Other Municipal Positions

| Elected/Appointed Positions (MGL 41 s.108 & 108A) | | Annual Salary |
|--|----------------------------|---------------|
| 2 | Town Manager | \$ 174,500.00 |
| 2 | Finance Director | \$ 149,972.00 |
| 2 | Chief of Police | \$ 178,000.00 |
| 2 | Chief of Fire | \$ 148,550.00 |
| 2 | Police Captain | \$ 144,230.00 |
| 2 | Deputy Fire Chief | \$ 128,547.00 |
| 2 | Select Board/Chair | \$ 3,225.00 |
| 2 | Board of Assessors/Chair | \$ 2,936.00 |
| 2 | Select Board/Members | \$ 2,852.00 |
| 2 | Board of Assessors/Members | \$ 2,193.00 |
| 2 | Board of Appeals/Chair | \$ 1,681.00 |
| 2 | Board of Health/Chair | \$ 873.00 |
| 2 | Board of Health/Members | \$ 495.00 |

| Professional Stipends | | Annual Amount |
|-----------------------|--|---------------|
| 5 | Animal Control Officer/Inspector | \$ 14,000.00 |
| 8 | Procurement Stipend | \$ 7,500.00 |
| 9 | Meeting Stipend | \$ 4,380.00 |
| | Animal Pick-Up (Deceased) | \$ 2,400.00 |
| | Wildlife Officer | \$ 2,400.00 |
| | Elections Stipend | \$ 2,000.00 |
| | Harbormaster | \$ 1,200.00 |
| | Professional Certifications | \$ 1,000.00 |
| Police | EMT Certification (Police) | \$ 1,750.00 |
| Police | Accreditation Stipend (Police) | \$ 1,200.00 |
| Fire | EMT Stipend (Fire) | \$ 3,900.00 |
| Fire | Emergency Manager Stipend (Fire Chief) | \$ 5,000.00 |
| Fire | Call Fire Captain | \$ 750.00 |
| Fire | Full-time Call Fire Training Officer | \$ 500.00 |
| DPW | Snow Stipend (17 Wks.) | \$ 210.00 |
| DPW | Sand Stipend (17 Wks.) | \$ 210.00 |
| DPW | On-Call Stipend (17 Wks.) | \$ 50.00 |
| DPW | On-Call Stipend (35 Wks.) | \$ 175.00 |
| DPW | License Stipend | \$ 750.00 |
| DPW | Active Water Emergency Stipend | \$ 100.00 |

| Call Firefighters | | Hourly Wage |
|---|----|-------------|
| Rank | | |
| Captain w/Certified Officer I/EMT | \$ | 44.87 |
| Lieutenant w/Certified Officer I/EMT | \$ | 38.28 |
| Lieutenant | \$ | 35.28 |
| Firefighter w/Certified I & II/EMT | \$ | 32.67 |
| Firefighter w/Driver Operator and/or Certified I & II | \$ | 30.67 |
| Probationary Rate Firefighter | \$ | 25.00 |

All Call Rates are based off of Firefighter Union's Grade & Step

| Occasional Help | | Wage |
|---------------------------------|-------------------|--------|
| Registrar of Voters (annually) | \$ | 400.00 |
| Seasonal Employee | \$15.00 - \$28.00 | |
| CY2025 | | |
| Poll Worker | \$ | 15.00 |
| Warden (Elections/Registration) | \$ | 16.00 |
| Senior Work-Off Program | \$ | 15.00 |

Legend Notes

- 1 Position also receives either a "Professional Stipend" or additional compensation for certification. See MGL Ch. 41, Sec 19K & 108P.
- 2 Differs from Wage Grid table; see "Other Municipal Positions" section for additional information.
- 3 Shift differential is 7% for Evening and 9% for Midnight shift.
- 4 Shift differential is 5% for Evening and 7% for Midnight shift.
- 5 Position is shared with the Town of Manchester-by-the-Sea; 50% cost sharing.
- 6 Position funded through the Community Preservation Act Fund and Affordable Housing Trust.
- 7 Position is shared with the Town of Wenham and HWRSD; cost sharing in accordance with contract/approved hours.
- 8 Procurement stipend for DPW Director
- 9 Assistant to the Town Manager/Community Preservation Coordinator
- 10 Position is part of an Intermunicipal Contract with other communities

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

GENERAL GOVERNMENT

| | | 2023 | 2024 | 2025 | 2026 | | |
|------------|---|-------------------|-------------------|-------------------|-------------------|--------------------|---------------|
| | | ACTUAL | ACTUAL | BUDGET | DEPT REQ | \$ Change | % Change |
| 122 | SELECT BOARD | | | | | | |
| | PERSONNEL EXPENSES | \$ 29,615 | \$ 30,377 | \$ 35,931 | \$ 36,449 | \$ 518 | 1.44% |
| | OPERATING EXPENSES | \$ 73 | \$ 5,780 | \$ 4,800 | \$ 4,800 | \$ - | 0.00% |
| | TOTAL SELECT BOARD | \$ 29,688 | \$ 36,157 | \$ 40,731 | \$ 41,249 | \$ 518 | 1.27% |
| 123 | TOWN MANAGER | | | | | | |
| | PERSONNEL EXPENSES | \$ 213,916 | \$ 220,415 | \$ 266,389 | \$ 253,275 | \$ (13,114) | -4.92% |
| | OPERATING EXPENSES | \$ 189,911 | \$ 124,030 | \$ 132,854 | \$ 126,664 | \$ (6,190) | -4.66% |
| | TOTAL TOWN MANAGER | \$ 403,827 | \$ 344,445 | \$ 399,243 | \$ 379,939 | \$ (19,304) | -4.84% |
| 132 | FINANCE COMMITTEE | | | | | | |
| | EXPENSES | \$ 184 | \$ 190 | \$ 435 | \$ 447 | \$ 12 | 2.76% |
| | ANNUAL RESERVE FUND | \$ - | \$ - | \$ 100,000 | \$ 100,000 | \$ - | 0.00% |
| | TOTAL FINANCE & ADVISORY COMMITTEE | \$ 184 | \$ 190 | \$ 100,435 | \$ 100,447 | \$ 12 | 0.01% |
| 135 | FINANCE DIRECTOR/TOWN ACCOUNTANT | | | | | | |
| | PERSONNEL EXPENSES | \$ 221,811 | \$ 261,204 | \$ 310,747 | \$ 310,747 | \$ - | 0.00% |
| | OPERATING EXPENSES | \$ 216,468 | \$ 211,707 | \$ 285,143 | \$ 273,609 | \$ (11,534) | -4.04% |
| | CAPITAL EXPENSES | \$ 530 | \$ 2,297 | \$ 12,000 | \$ 20,000 | \$ 8,000 | 66.67% |
| | TOTAL FINANCE DIRECTOR/TOWN ACCOUNTANT | \$ 438,809 | \$ 475,208 | \$ 607,890 | \$ 604,356 | \$ (3,534) | -0.58% |
| 141 | ASSESSORS | | | | | | |
| | PERSONNEL EXPENSES | \$ 150,910 | \$ 180,259 | \$ 189,438 | \$ 197,133 | \$ 7,695 | 4.06% |
| | OPERATING EXPENSES | \$ 25,463 | \$ 31,922 | \$ 30,645 | \$ 33,966 | \$ 3,321 | 10.84% |
| | TOTAL ASSESSORS | \$ 176,373 | \$ 212,181 | \$ 220,083 | \$ 231,099 | \$ 11,016 | 5.01% |
| 145 | TREASURER/COLLECTOR | | | | | | |
| | PERSONNEL EXPENSES | \$ 203,209 | \$ 202,873 | \$ 239,282 | \$ 248,544 | \$ 9,262 | 3.87% |
| | OPERATING EXPENSES | \$ 45,685 | \$ 35,929 | \$ 55,150 | \$ 55,400 | \$ 250 | 0.45% |
| | TOTAL TREASURER/COLLECTOR | \$ 248,894 | \$ 238,802 | \$ 294,432 | \$ 303,944 | \$ 9,512 | 3.23% |
| 151 | TOWN COUNSEL | | | | | | |
| | LEGAL RETAINER | \$ 84,594 | \$ 84,000 | \$ 84,000 | \$ 84,000 | \$ - | 0.00% |
| | LEGAL EXPENSES | \$ 91,700 | \$ 73,195 | \$ 62,000 | \$ 62,000 | \$ - | 0.00% |
| | TOTAL TOWN COUNSEL | \$ 176,294 | \$ 157,195 | \$ 146,000 | \$ 146,000 | \$ - | 0.00% |
| 152 | HUMAN RESOURCES | | | | | | |
| | PERSONNEL EXPENSES | \$ 96,699 | \$ 100,610 | \$ 107,776 | \$ 123,031 | \$ 15,255 | 14.15% |
| | OPERATING EXPENSES | \$ 488 | \$ 1,305 | \$ 6,808 | \$ 1,808 | \$ (5,000) | -73.44% |
| | TOTAL HUMAN RESOURCES | \$ 97,187 | \$ 101,915 | \$ 114,584 | \$ 124,839 | \$ 10,255 | 8.95% |

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

| | | 2023 | 2024 | 2025 | 2026 | | |
|------------|--|---------------------|---------------------|---------------------|---------------------|-------------------|----------------|
| | | ACTUAL | ACTUAL | BUDGET | DEPT REQ | \$ Change | % Change |
| 161 | TOWN CLERK | | | | | | |
| | PERSONNEL EXPENSES | \$ 144,732 | \$ 153,144 | \$ 161,704 | \$ 170,547 | \$ 8,843 | 5.47% |
| | OPERATING EXPENSES | \$ 18,213 | \$ 17,481 | \$ 16,617 | \$ 32,271 | \$ 15,654 | 94.20% |
| | TOTAL TOWN CLERK | \$ 162,945 | \$ 170,625 | \$ 178,321 | \$ 202,818 | \$ 24,497 | 13.74% |
| 162 | ELECTION & REGISTRATION | | | | | | |
| | PERSONNEL EXPENSES | \$ 11,397 | \$ 7,894 | \$ 18,333 | \$ 16,710 | \$ (1,623) | -8.85% |
| | OPERATING EXPENSES | \$ 27,121 | \$ 23,732 | \$ 31,130 | \$ 25,605 | \$ (5,525) | -17.75% |
| | TOTAL ELECTION & REGISTRATION | \$ 38,518 | \$ 31,626 | \$ 49,463 | \$ 42,315 | \$ (7,148) | -14.45% |
| 171 | CONSERVATION COMMISSION | | | | | | |
| | PERSONNEL EXPENSES | \$ 29,098 | \$ 64,398 | \$ 80,651 | \$ 83,367 | \$ 2,716 | 3.37% |
| | OPERATING EXPENSES | \$ 1,575 | \$ 961 | \$ 2,425 | \$ 18,225 | \$ 15,800 | 651.55% |
| | TOTAL CONSERVATION COMMISSION | \$ 30,673 | \$ 65,359 | \$ 83,076 | \$ 101,592 | \$ 18,516 | 22.29% |
| 172 | PLANNING DEPARTMENT | | | | | | |
| | PERSONNEL EXPENSES | \$ 126,335 | \$ 140,239 | \$ 143,564 | \$ 141,552 | \$ (2,012) | -1.40% |
| | OPERATING EXPENSES | \$ 11,744 | \$ 1,040 | \$ 5,700 | \$ 7,800 | \$ 2,100 | 36.84% |
| | TOTAL PLANNING DEPARTMENT | \$ 138,079 | \$ 141,279 | \$ 149,264 | \$ 149,352 | \$ 88 | 0.06% |
| 174 | CHEBACCO WOODS | | | | | | |
| | OPERATING EXPENSES | \$ 225 | \$ 31 | \$ 2,500 | \$ 2,400 | \$ (100) | -4.00% |
| | TOTAL CHEBACCO WOODS | \$ 225 | \$ 31 | \$ 2,500 | \$ 2,400 | \$ (100) | -4.00% |
| 192 | PUBLIC BUILDING & MAINTENANCE | | | | | | |
| | PERSONNEL EXPENSES | \$ 63,189 | \$ 66,591 | \$ 77,919 | \$ 82,260 | \$ 4,341 | 5.57% |
| | OPERATING EXPENSES | \$ 260,716 | \$ 231,535 | \$ 227,151 | \$ 224,990 | \$ (2,161) | -0.95% |
| | CAPITAL EXPENSES | \$ - | \$ - | \$ - | \$ - | \$ - | 0.00% |
| | TOTAL PUBLIC BUILDING & MAINTENANCE | \$ 323,905 | \$ 298,126 | \$ 305,070 | \$ 307,250 | \$ 2,180 | 0.71% |
| | PERSONNEL | \$ 1,290,911 | \$ 1,428,004 | \$ 1,631,734 | \$ 1,663,615 | \$ 31,881 | 1.95% |
| | OPERATING | \$ 974,690 | \$ 845,135 | \$ 1,059,358 | \$ 1,073,985 | \$ 14,627 | 0.00% |
| | TOTAL GENERAL GOVERNMENT | \$ 2,265,601 | \$ 2,273,139 | \$ 2,691,092 | \$ 2,737,600 | \$ 46,508 | 1.73% |

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

PUBLIC SAFETY

| 210 | POLICE | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
|------------|--|------------------------|------------------------|------------------------|--------------------------|--------------------|-----------------|
| | PERSONNEL EXPENSES | \$ 1,775,477 | \$ 1,831,672 | \$ 2,246,842 | \$ 2,175,099 | \$ (71,743) | -3.19% |
| | OPERATING EXPENSES | \$ 125,814 | \$ 118,484 | \$ 139,878 | \$ 142,213 | \$ 2,335 | 1.67% |
| | CAPITAL EXPENSES | \$ 18,980 | \$ 18,980 | \$ 25,086 | \$ - | \$ (25,086) | 0.00% |
| | TOTAL POLICE | \$ 1,920,271 | \$ 1,969,136 | \$ 2,411,806 | \$ 2,317,312 | \$ (94,494) | -3.92% |
| | | | | | | | |
| 233 | EMERGENCY OPERATIONS CENTER | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 319,915 | \$ 321,993 | \$ 361,745 | \$ 363,231 | \$ 1,486 | 0.41% |
| | OPERATING EXPENSES | \$ 46,121 | \$ 46,101 | \$ 50,756 | \$ 51,645 | \$ 889 | 1.75% |
| | CAPITAL EXPENSES | \$ - | \$ - | \$ - | \$ - | \$ - | 0.00% |
| | TOTAL EMERGENCY OPERATIONS CENTER | \$ 366,036 | \$ 368,094 | \$ 412,501 | \$ 414,876 | \$ 2,375 | 0.58% |
| | | | | | | | |
| 220 | FIRE DEPARTMENT | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 738,029 | \$ 850,274 | \$ 937,540 | \$ 1,036,059 | \$ 98,519 | 10.51% |
| | OPERATING EXPENSES | \$ 102,522 | \$ 128,123 | \$ 125,548 | \$ 128,692 | \$ 3,144 | 2.50% |
| | CAPITAL EXPENSES | \$ 118,431 | \$ 125,938 | \$ 111,712 | \$ 111,712 | \$ - | 0.00% |
| | TOTAL FIRE DEPARTMENT | \$ 958,982 | \$ 1,104,335 | \$ 1,174,800 | \$ 1,276,463 | \$ 101,663 | 8.65% |
| | | | | | | | |
| 241 | INSPECTIONAL EXPENSES | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 205,697 | \$ 212,317 | \$ 227,711 | \$ 236,071 | \$ 8,360 | 3.67% |
| | OPERATING EXPENSES | \$ 2,796 | \$ 16,296 | \$ 20,409 | \$ 20,409 | \$ - | 0.00% |
| | CAPITAL EXPENSES | \$ - | \$ - | \$ - | \$ - | \$ - | 0.00% |
| | TOTAL INSPECTIONAL EXPENSES | \$ 208,493 | \$ 228,613 | \$ 248,120 | \$ 256,480 | \$ 8,360 | 3.37% |
| | | | | | | | |
| 291 | EMERGENCY MANAGEMENT DEPT | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ - | \$ - | \$ - | \$ - | \$ - | 0.00% |
| | OPERATING EXPENSES | \$ 1,024 | \$ 1,099 | \$ 1,100 | \$ 1,100 | \$ - | 0.00% |
| | TOTAL EMERGENCY MANAGEMENT DEPT | \$ 1,024 | \$ 1,099 | \$ 1,100 | \$ 1,100 | \$ - | 0.00% |
| | | | | | | | |
| 292 | ANIMAL CONTROL | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 33,780 | \$ 36,452 | \$ 35,280 | \$ 35,780 | \$ 500 | 0.00% |
| | OPERATING EXPENSES | \$ 463 | \$ 397 | \$ 1,850 | \$ 1,850 | \$ - | 0.00% |
| | TOTAL ANIMAL CONTROL | \$ 34,243 | \$ 36,849 | \$ 37,130 | \$ 37,630 | \$ 500 | 1.35% |
| | | | | | | | |
| 919 | ENERGY | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ - | \$ - | \$ - | \$ - | \$ - | 0.00% |
| | OPERATING EXPENSES | \$ 28,563 | \$ 38,220 | \$ 29,000 | \$ 25,000 | \$ (4,000) | 0.00% |
| | ENERGY | \$ 28,563 | \$ 38,220 | \$ 29,000 | \$ 25,000 | \$ (4,000) | -13.79% |
| | | | | | | | |
| | PERSONNEL | \$ 3,072,898 | \$ 3,252,708 | \$ 3,809,118 | \$ 3,846,240 | \$ 37,122 | 0.97% |
| | OPERATING | \$ 444,714 | \$ 493,639 | \$ 505,339 | \$ 482,621 | \$ (22,718) | 0.00% |
| | TOTAL PUBLIC SAFETY | \$ 3,517,612 | \$ 3,746,347 | \$ 4,314,457 | \$ 4,328,861 | \$ 14,404 | 0.33% |

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

DEPARTMENT OF PUBLIC WORKS

| | | 2023 | 2024 | 2025 | 2026 | | |
|------------|---|---------------------|---------------------|---------------------|---------------------|--------------------|---------------|
| | | ACTUAL | ACTUAL | BUDGET | DEPT REQ | \$ Change | % Change |
| 421 | DEPARTMENT OF PUBLIC WORKS | | | | | | |
| | PERSONNEL EXPENSES | \$ 283,538 | \$ 300,522 | \$ 325,710 | \$ 355,445 | \$ 29,735 | 9.13% |
| | OPERATING EXPENSES | \$ 16,820 | \$ 19,417 | \$ 32,700 | \$ 31,600 | \$ (1,100) | -3.36% |
| | CAPITAL EXPENSES | \$ - | \$ 9,783 | \$ 10,000 | \$ 10,000 | \$ - | 0.00% |
| | TOTAL DEPARTMENT OF PUBLIC WORKS | \$ 300,358 | \$ 329,722 | \$ 368,410 | \$ 397,045 | \$ 28,635 | 7.77% |
| 422 | HIGHWAY | | | | | | |
| | PERSONNEL EXPENSES | \$ 209,880 | \$ 225,669 | \$ 292,826 | \$ 281,984 | \$ (10,842) | 0.00% |
| | OPERATING EXPENSES | \$ 163,588 | \$ 137,863 | \$ 236,900 | \$ 236,900 | \$ - | 0.00% |
| | TOTAL HIGHWAY | \$ 373,468 | \$ 363,532 | \$ 529,726 | \$ 518,884 | \$ (10,842) | -2.05% |
| 423 | SNOW REMOVAL | | | | | | |
| | PERSONNEL EXPENSES | \$ 78,196 | \$ 67,956 | \$ 99,410 | \$ 99,410 | \$ - | 0.00% |
| | OPERATING EXPENSES | \$ 172,878 | \$ 136,780 | \$ 179,250 | \$ 183,250 | \$ 4,000 | 0.00% |
| | TOTAL SNOW REMOVAL | \$ 251,074 | \$ 204,736 | \$ 278,660 | \$ 282,660 | \$ 4,000 | 1.44% |
| 425 | VEHICLE MAINTENANCE | | | | | | |
| | PERSONNEL EXPENSES | \$ 70,292 | \$ 79,993 | \$ 117,858 | \$ 100,751 | \$ (17,107) | 0.00% |
| | OPERATING EXPENSES | \$ 104,043 | \$ 101,073 | \$ 84,532 | \$ 94,194 | \$ 9,662 | 0.00% |
| | TOTAL VEHICLE MAINTENANCE | \$ 174,335 | \$ 181,066 | \$ 202,390 | \$ 194,945 | \$ (7,445) | -3.68% |
| 429 | CEMETERY | | | | | | |
| | PERSONNEL EXPENSES | \$ 139,848 | \$ 134,810 | \$ 161,845 | \$ 162,597 | \$ 752 | 0.00% |
| | OPERATING EXPENSES | \$ 12,136 | \$ 14,518 | \$ 13,000 | \$ 13,000 | \$ - | 0.00% |
| | TOTAL CEMETERY | \$ 151,984 | \$ 149,328 | \$ 174,845 | \$ 175,597 | \$ 752 | 0.43% |
| 433 | SANITATION - WASTE, RECYCLING & LANDFILL | | | | | | |
| | PERSONNEL EXPENSES | \$ 4,947 | \$ 4,848 | \$ 6,345 | \$ 6,611 | \$ 266 | 0.00% |
| | OPERATING EXPENSES | \$ 806,021 | \$ 840,770 | \$ 833,610 | \$ 878,205 | \$ 44,595 | 0.00% |
| | TOTAL SANITATION | \$ 810,968 | \$ 845,618 | \$ 839,955 | \$ 884,816 | \$ 44,861 | 5.34% |
| 650 | PARK, FIELDS AND GROUNDS | | | | | | |
| | PERSONNEL EXPENSES | \$ 85,252 | \$ 92,032 | \$ 82,976 | \$ 85,167 | \$ 2,191 | 0.00% |
| | OPERATING EXPENSES | \$ 4,509 | \$ 2,653 | \$ 5,150 | \$ 4,500 | \$ (650) | 0.00% |
| | TOTAL PARK, FIELDS AND GROUNDS | \$ 89,761 | \$ 94,685 | \$ 88,126 | \$ 89,667 | \$ 1,541 | 1.75% |
| | PERSONNEL | \$ 871,953 | \$ 905,830 | \$ 1,086,970 | \$ 1,091,965 | \$ 4,995 | 0.46% |
| | OPERATING | \$ 1,279,995 | \$ 1,262,857 | \$ 1,395,142 | \$ 1,451,649 | \$ 56,507 | 0.00% |
| | TOTAL DEPARTMENT OF PUBLIC WORKS | \$ 2,151,948 | \$ 2,168,687 | \$ 2,482,112 | \$ 2,543,614 | \$ 61,502 | 2.48% |

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

HEALTH AND HUMAN EXPENSES

| 511 | HEALTH DEPARTMENT | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
|-----|--|-------------------|-------------------|-------------------|-------------------|------------------|---------------|
| | PERSONNEL EXPENSES | \$ 105,262 | \$ 125,580 | \$ 131,850 | \$ 136,955 | \$ 5,105 | 0.00% |
| | OPERATING EXPENSES | \$ 36,443 | \$ 41,016 | \$ 43,010 | \$ 43,010 | \$ - | 0.00% |
| | TOTAL HEALTH DEPARTMENT | \$ 141,705 | \$ 166,596 | \$ 174,860 | \$ 179,965 | \$ 5,105 | 2.92% |
| | | | | | | | |
| 541 | COUNCIL ON AGING | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 87,420 | \$ 95,060 | \$ 106,969 | \$ 114,233 | \$ 7,264 | 0.00% |
| | OPERATING EXPENSES | \$ 24,845 | \$ 26,392 | \$ 27,200 | \$ 28,200 | \$ 1,000 | 0.00% |
| | TOTAL COUNCIL ON AGING | \$ 112,265 | \$ 121,452 | \$ 134,169 | \$ 142,433 | \$ 8,264 | 6.16% |
| | | | | | | | |
| 543 | VETERANS BENEFITS | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | OPERATING EXPENSES | \$ 36,028 | \$ 50,401 | \$ 40,000 | \$ 52,921 | \$ 12,921 | 0.00% |
| | VETERAN ADMINISTRATION FEE | \$ 15,000 | \$ 17,250 | \$ 20,000 | \$ 22,750 | \$ 2,750 | 0.00% |
| | TOTAL VETERANS BENEFITS | \$ 51,028 | \$ 67,651 | \$ 60,000 | \$ 75,671 | \$ 15,671 | 26.12% |
| | | | | | | | |
| | PERSONNEL | \$ 192,682 | \$ 220,640 | \$ 238,819 | \$ 251,188 | \$ 12,369 | 5.18% |
| | OPERATING | \$ 112,316 | \$ 135,059 | \$ 130,210 | \$ 146,881 | \$ 16,671 | 0.00% |
| | TOTAL HEALTH AND HUMAN EXPENSES | \$ 304,998 | \$ 355,699 | \$ 369,029 | \$ 398,069 | \$ 29,040 | 7.87% |

CULTURE & RECREATION

| 610 | LIBRARY | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
|-----|---------------------------------------|---------------------|---------------------|---------------------|---------------------|--------------------|----------------|
| | STATE CONTRIBUTION | \$ 17,679 | \$ 19,042 | \$ 18,562 | \$ 20,993 | \$ 2,431 | 13.10% |
| | ASSESSMENT | \$ 863,647 | \$ 898,075 | \$ 916,957 | \$ 944,466 | \$ 27,509 | 3.00% |
| | GOVERNMENTAL FEES | \$ - | \$ - | \$ 29,805 | \$ 29,805 | \$ - | 0.00% |
| | TOTAL LIBRARY | \$ 881,325 | \$ 917,116 | \$ 965,325 | \$ 995,264 | \$ 29,940 | 3.10% |
| | | | | | | | |
| 630 | RECREATION | 2023 ACTUAL | 2024 ACTUAL | 2025 BUDGET | 2026 DEPT REQ | \$ Change | % Change |
| | PERSONNEL EXPENSES | \$ 150,467 | \$ 203,904 | \$ 213,911 | \$ 175,722 | \$ (38,189) | -17.85% |
| | OPERATING EXPENSES | \$ 29,411 | \$ 21,771 | \$ 21,050 | \$ 22,940 | \$ 1,890 | 0.00% |
| | TOTAL RECREATION | \$ 179,878 | \$ 225,675 | \$ 234,961 | \$ 198,662 | \$ (36,299) | -15.45% |
| | | | | | | | |
| | PERSONNEL | \$ 150,467 | \$ 203,904 | \$ 213,911 | \$ 175,722 | \$ (38,189) | -13.82% |
| | OPERATING | \$ 910,736 | \$ 938,887 | \$ 986,375 | \$ 1,018,204 | \$ 31,830 | 8.45% |
| | TOTAL CULTURE & RECREATION | \$ 1,061,203 | \$ 1,142,791 | \$ 1,200,286 | \$ 1,193,926 | \$ (6,359) | 4.47% |

**APPENDIX B
TOWN OF HAMILTON
FY2026 GENERAL FUND PROJECTED BUDGET**

UNCLASSIFIED

| | | 2023 | 2024 | 2025 | 2025 | | |
|-----|---------------------------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------|
| | UNCLASSIFIED | ACTUAL | ACTUAL | BUDGET | DEPT REQ | \$ Change | % Change |
| 148 | Salary Reserve | \$ - | \$ - | \$ 86,246 | \$ 80,000 | \$ (6,246) | -7.24% |
| 149 | (1) Capital Spending | \$ 369,656 | \$ 1,022,717 | \$ 1,610,788 | \$ 762,125 | \$ (848,663) | -52.69% |
| 692 | Celebrations | \$ 13,852 | \$ 12,978 | \$ 14,598 | \$ 14,880 | \$ 283 | 1.94% |
| 722 | Debt Service | \$ 581,121 | \$ 578,318 | \$ 585,410 | \$ 558,152 | \$ (27,258) | -4.66% |
| 820 | State Assessment | \$ 241,936 | \$ 251,182 | \$ 252,495 | \$ 266,948 | \$ 14,453 | 5.72% |
| 911 | Retirement Fund | \$ 1,231,493 | \$ 1,212,195 | \$ 1,462,523 | \$ 1,691,946 | \$ 229,423 | 15.69% |
| 913 | Unemployment Compensation | \$ 4,492 | \$ 3,526 | \$ 35,000 | \$ 30,000 | \$ (5,000) | -14.29% |
| 914 | Group Health Life Insurance | \$ 874,168 | \$ 946,033 | \$ 1,047,139 | \$ 1,245,881 | \$ 198,742 | 18.98% |
| 916 | P & C Insurance | \$ 281,836 | \$ 285,990 | \$ 343,047 | \$ 351,614 | \$ 8,567 | 2.50% |
| 917 | Medicare Tax | \$ 78,609 | \$ 83,701 | \$ 102,969 | \$ 119,690 | \$ 16,721 | 16.24% |
| 992 | Transfer to Special Revenue | \$ 75,000 | \$ - | \$ - | \$ - | \$ - | 0.00% |
| 992 | (5) Transfer to Capital Stabilization | \$ - | \$ - | \$ 235,000 | \$ 235,000 | \$ - | 0.00% |
| 995 | Transfer to Enterprise | \$ 63,500 | \$ - | \$ - | \$ - | \$ - | 0.00% |
| 996 | (3) Transfer to OPEB | \$ 125,000 | \$ 125,000 | \$ 125,000 | \$ 125,000 | \$ - | 0.00% |
| 996 | (4) Transfer to Stabilization | \$ 20,000 | \$ 57,541 | \$ 82,781 | \$ - | \$ (82,781) | -100.00% |
| 997 | (2) Transfer to HDC | \$ 55,000 | \$ 58,000 | \$ 58,000 | \$ 78,702 | \$ 20,702 | 35.69% |
| 172 | (6) Form-Based Zoning | \$ - | \$ - | \$ 125,000 | \$ - | \$ (125,000) | -100.00% |
| | TOTAL UNCLASSIFIED | \$ 4,015,664 | \$ 4,637,181 | \$ 6,165,996 | \$ 5,559,938 | \$ (606,058) | -9.83% |

EDUCATION

| | | 2023 | 2024 | 2025 | 2026 | | |
|-----|------------------------|----------------------|----------------------|----------------------|----------------------|-------------------|--------------|
| | EDUCATION | ACTUAL | ACTUAL | BUDGET | DEPT REQ | \$ Change | % Change |
| 300 | HWRSD Assessment | \$ 21,839,706 | \$ 22,694,537 | \$ 23,375,176 | \$ 24,456,892 | \$ 1,081,716 | 4.63% |
| | ENSATSD Assessment | \$ 290,037 | \$ 280,883 | \$ 402,150 | \$ 424,070 | \$ 21,920 | 5.45% |
| | ENSATSD Debt Service | \$ 26,575 | \$ 26,575 | \$ 24,209 | \$ 59,531 | \$ 35,322 | 145.90% |
| | HWRSD Debt Service | \$ 371,606 | \$ 394,955 | \$ 1,438,690 | \$ 1,213,091 | \$ (225,599) | -15.68% |
| | TOTAL EDUCATION | \$ 22,527,924 | \$ 23,396,950 | \$ 25,240,225 | \$ 26,153,584 | \$ 913,359 | 3.62% |

| | | | | | | | |
|---------------------------|--|----------------------|----------------------|----------------------|----------------------|-------------------|--------------|
| TOTAL GENERAL FUND | | \$ 35,844,950 | \$ 37,720,794 | \$ 42,463,196 | \$ 42,915,592 | \$ 452,395 | 1.07% |
|---------------------------|--|----------------------|----------------------|----------------------|----------------------|-------------------|--------------|

| | | | |
|-----------------|--|----------------------|----------------------|
| ART 2025/4 2-3 | General Town Departmental Appropriations | \$ 14,986,402 | \$ 15,561,181 |
| ART 2025/4 2-3 | HWRSD Assessment | \$ 24,813,866 | \$ 25,669,983 |
| ART 2025/4 2-3 | ENSATSD Assessment | \$ 426,359 | \$ 483,601 |
| ART 2025/4 2-3 | General Operating Budget for Town and Schools | \$ 40,226,627 | \$ 41,714,765 |
| ART 2025/4 2-4 | Capital Expenditures | \$ 1,610,788 | \$ 762,125 (1) |
| ART 2025/4 2-7 | Hamilton Development Corporation | \$ 58,000 | \$ 78,702 (2) |
| ART 2025/4 2-8 | OPEB Trust Fund | \$ 125,000 | \$ 125,000 (3) |
| ART 2025/4 2-9 | Stabilization Fund | \$ 82,781 | \$ - (4) |
| ART 2025/4 2-10 | Capital Stabilization Fund | \$ 235,000 | \$ 235,000 (5) |
| ART 2025/4 2-12 | Town Center Comprehensive Plan | \$ 125,000 | \$ - (6) |
| | Total General Fund | \$ 42,463,196 | \$ 42,915,592 |

APPENDIX B1
Town Debt Service (excluding CPA and Water) for Fiscal Year 2026

| | <u>FY23 Budget</u> | <u>FY24 Budget</u> | <u>FY25 Budget</u> | <u>FY26 Budget</u> | <u>\$ Change</u> | <u>% Change</u> |
|---|---------------------|---------------------|---------------------|---------------------|---------------------|-----------------|
| <u>DEBT SERVICE</u> | | | | | | |
| <i>Interest/Issuance Costs</i> | | | | | | |
| Public Safety Bldg | \$ 21,800 | \$ 13,450 | \$ 9,500 | \$ 5,300 | \$ (4,200) | -44.21% |
| Ladder/Pumper Truck | \$ 10,500 | \$ 7,700 | \$ 5,600 | \$ 3,500 | \$ (2,100) | -37.50% |
| Landfill Capping | \$ 19,508 | \$ 16,108 | \$ 14,558 | \$ 11,008 | \$ (3,550) | -24.39% |
| Chebacco Road Paving | \$ 27,920 | \$ 21,420 | \$ 18,495 | \$ 16,545 | \$ (1,950) | -10.54% |
| Town Hall Project | \$ - | \$ - | \$ 18,581 | \$ 16,800 | \$ (1,781) | -9.59% |
| Short-term (bond anticipation notes) | \$ 11,933 | \$ 16,326 | \$ - | \$ - | \$ - | 0.00% |
| Total Interest/Issuance Costs | \$ 91,661 | \$ 75,004 | \$ 66,734 | \$ 53,153 | \$ (13,581) | -20.35% |
| <i>Principal</i> | | | | | | |
| Public Safety Bldg | \$ 280,000 | \$ 275,000 | \$ 270,000 | \$ 265,000 | \$ (5,000) | -1.85% |
| Ladder/Pumper Truck | \$ 70,000 | \$ 70,000 | \$ 70,000 | \$ 70,000 | \$ - | 0.00% |
| Landfill Capping | \$ 85,000 | \$ 85,000 | \$ 85,000 | \$ 85,000 | \$ - | 0.00% |
| Chebacco Road Paving | \$ 65,000 | \$ 65,000 | \$ 65,000 | \$ 65,000 | \$ - | 0.00% |
| Town Hall Project | \$ - | \$ - | \$ 28,676 | \$ 20,000 | \$ (8,676) | -30.26% |
| Short-term (bond anticipation notes) | \$ - | \$ 156,000 | \$ - | \$ - | \$ - | 0.00% |
| Total Principal | \$ 500,000 | \$ 651,000 | \$ 518,676 | \$ 505,000 | \$ (13,676) | -2.64% |
| TOTAL DEBT SERVICE (EXCLUDING SCHOOL DEBT) | \$ 591,661 | \$ 726,004 | \$ 585,410 | \$ 558,152 | \$ (27,258) | -4.66% |
| <i>School Debt (Principal & Interest)</i> | | | | | | |
| Cutler Roof/Other | \$ 83,172 | \$ 82,229 | \$ 83,592 | \$ 84,295 | \$ 703 | 0.84% |
| Cutler Feasibility Study | \$ - | \$ - | \$ - | \$ 19,385 | \$ 19,385 | 100.00% |
| Buker & Winthrop Boilers & Windows | \$ 76,191 | \$ 75,888 | \$ 81,272 | \$ 79,434 | \$ (1,838) | -2.26% |
| Winthrop School Fire Suppression | \$ 84,569 | \$ 92,879 | \$ 89,989 | \$ 61,085 | \$ (28,904) | -32.12% |
| FY21 Capital Projects | \$ 129,953 | \$ 143,959 | \$ 139,713 | \$ 124,206 | \$ (15,507) | -11.10% |
| ENSATSD | \$ 34,806 | \$ 26,575 | \$ 24,209 | \$ 59,531 | \$ 35,322 | 145.90% |
| Athletic Complex Project | \$ - | \$ - | \$ 1,044,124 | \$ 844,686 | \$ (199,438) | -19.10% |
| Total School Debt | \$ 408,691 | \$ 421,530 | \$ 1,462,899 | \$ 1,272,622 | \$ (190,277) | -13.01% |
| TOTAL DEBT SERVICE | \$ 1,000,352 | \$ 1,147,534 | \$ 2,048,309 | \$ 1,830,774 | \$ (217,534) | -10.62% |

APPENDIX B2
Use of Free Cash for Fiscal Year 2026 Budget

| Description | FY25 Budget | FY26 Budget | \$ Change | % Change |
|--|---------------------|---------------------|------------------|--------------|
| Capital Expenditures | \$ 1,110,788 | \$ 762,125 | \$ (348,663) | -31.39% |
| Fire Dept Capital Lease Purchases | \$ - | \$ 111,712 | \$ 111,712 | 100.00% |
| General Stabilization Transfer | \$ 82,781 | \$ - | \$ (82,781) | -100.00% |
| Capital Stabilization Transfer | \$ 235,000 | \$ 235,000 | \$ - | 0.00% |
| OPEB Trust Transfer | \$ 125,000 | \$ 125,000 | \$ - | 0.00% |
| Pension Trust Transfer (supplement a portion) | \$ - | \$ 550,000 | \$ 550,000 | 100.00% |
| One-Time Retirement Payouts | \$ 147,671 | \$ 37,829 | \$ (109,842) | -74.38% |
| One-Time General Code Software - Town Clerk | \$ - | \$ 15,000 | \$ 15,000 | 100.00% |
| Town Center Comprehensive Plan (Form Based Zoning) | \$ 125,000 | \$ - | \$ (125,000) | -100.00% |
| TOTAL USE OF FREE CASH | \$ 1,826,240 | \$ 1,836,666 | \$ 10,426 | 0.57% |

APPENDIX C
FY2026 BUDGET ASSESSMENT FOR EDUCATION

Hamilton-Wenham Regional School District
and
Essex North Shore Agricultural & Technical School District



HAMILTON-WENHAM REGIONAL SCHOOL DISTRICT

Hamilton-Wenham RSD FY26 Final Budget
 Passed by School Committee on February 6, 2025
 School District Treasurer's
 Certification for Member Towns

I, Kevin Merz Hamilton-Wenham Regional School District's District Treasurer here do certify the
 FY26 Final Budget passed by the School Committee on February 6, 2025.

Kevin Merz

 Treasurer Signature

Susan Bateman

 Member Town Certification of Receipt

Feb 10, 2025

 Date Received by Member Town

| | FY25 | FY26 | Increase \$ | Increase % |
|--|----------------------|----------------------|---------------------|--------------|
| Hamilton | | | | |
| Operating Budget After Offsets and Revenue Sources | \$ 23,376,462 | \$ 24,456,893 | \$ 1,080,430 | 4.62% |
| Debt Service After Offsets and Revenue Sources | \$ 1,321,020 | \$ 1,213,090 | \$ (107,930) | -8.17% |
| Hamilton Combined Total | \$ 24,697,482 | \$ 25,669,983 | \$ 972,501 | 3.94% |
| Wenham | | | | |
| Operating Budget After Offsets and Revenue Sources | \$ 11,887,472 | \$ 12,643,976 | \$ 756,504 | 6.36% |
| Debt Service After Offsets and Revenue Sources | \$ 671,769 | \$ 627,156 | \$ (44,613) | -6.64% |
| Wenham Combined Total | \$ 12,559,242 | \$ 13,271,132 | \$ 711,890 | 5.67% |
| Total | | | | |
| Operating Budget After Offsets and Revenue Sources | \$ 35,263,935 | \$ 37,100,869 | \$ 1,836,934 | 5.21% |
| Debt Service After Offsets and Revenue Sources | \$ 1,992,789 | \$ 1,840,246 | \$ (152,543) | -7.65% |
| Combined Assessment | \$ 37,256,724 | \$ 38,941,114 | \$ 1,684,391 | 4.52% |

FY26 Final Operating Budget Calculation

General Fund Operating Overview

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ Difference | % |
|--|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------|
| Operating Expense - Gross, before offsets & Overlays | \$ 36,461,481 | \$ 42,859,392 | \$ 40,808,912 | \$ 44,071,344 | \$ 42,944,943 | \$ 44,569,320 | \$ 46,589,151 | \$ 2,019,831 | 4.53% |

Operating Offsets

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ Difference | % |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|-------------------|--------------|
| <i>Recurring Offsets</i> | | | | | | | | | |
| School Choice | \$ 505,621 | \$ 385,000 | \$ 486,796 | \$ 365,000 | \$ 110,000 | \$ 335,000 | \$ 305,000 | \$ (30,000) | -8.96% |
| Preschool Tuition | \$ 44,259 | \$ 84,407 | \$ - | \$ 87,960 | \$ - | \$ 117,000 | \$ 117,000 | \$ - | 0.00% |
| Special Education Tuition In | \$ - | \$ - | \$ - | \$ - | \$ - | \$ 40,000 | \$ 39,000 | \$ (1,000) | -2.50% |
| Facilities Rental | \$ 2,000 | \$ 2,000 | \$ - | \$ 2,000 | \$ - | \$ 2,000 | \$ 2,000 | \$ - | 0.00% |
| Special Ed Grants | \$ 442,977 | \$ 470,095 | \$ 518,157 | \$ 470,095 | \$ 419,173 | \$ 480,095 | \$ 480,095 | \$ - | 0.00% |
| ESSER Grants | \$ - | \$ 147,226 | \$ 173,207 | \$ - | \$ 91,740 | \$ - | \$ - | \$ - | #DIV/0! |
| Title I | \$ 66,360 | \$ 65,522 | \$ 142,070 | \$ 65,522 | \$ 69,030 | \$ 64,190 | \$ 33,406 | \$ (30,784) | -47.96% |
| Circuit Breaker Offset | \$ 1,177,434 | \$ 1,038,894 | \$ 1,311,169 | \$ 1,224,339 | \$ 1,481,062 | \$ 1,352,357 | \$ 1,578,231 | \$ 225,874 | 16.70% |
| Regional Transportation Revolving Fund | \$ - | \$ - | \$ - | \$ 425,000 | \$ 490,761 | \$ 455,198 | \$ 541,178 | \$ 85,979 | 18.89% |
| Total Offsets | \$ 2,374,490 | \$ 2,193,144 | \$ 2,631,399 | \$ 2,639,916 | \$ 2,661,766 | \$ 2,845,840 | \$ 3,095,909 | \$ 250,069 | 8.79% |

General Fund After Offsets

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ Difference | % |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------|
| Operating Expense - Gross, after offsets & Overlays | \$ 34,086,991 | \$ 40,666,248 | \$ 38,177,513 | \$ 41,431,428 | \$ 40,283,177 | \$ 41,723,480 | \$ 43,493,242 | \$ 1,769,761 | 4.24% |

Operating Funding Sources

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ Difference | % |
|--|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------|
| <i>Revenues</i> | | | | | | | | | |
| Chapter 70-Base Aid | \$ 3,791,389 | \$ 3,742,189 | \$ 3,889,489 | \$ 3,889,489 | \$ 4,019,168 | \$ 4,019,168 | \$ 4,188,792 | \$ 169,624 | 4.22% |
| State Transportation | \$ 373,446 | \$ 382,323 | \$ 545,080 | \$ - | \$ - | \$ - | \$ - | \$ - | #DIV/0! |
| Medicaid Reimbursement | \$ 244,998 | \$ 45,000 | \$ 118,983 | \$ 95,000 | \$ 65,458 | \$ 105,000 | \$ 65,458 | \$ (39,542) | -37.66% |
| Interest Income | \$ 1,982 | \$ 3,070 | \$ 182,010 | \$ 3,070 | \$ 523,780 | \$ 33,070 | \$ 50,000 | \$ 16,931 | 51.20% |
| Prior Year Unexpended Encumbrances | \$ 102,635 | \$ - | \$ 102,567 | \$ - | \$ 156,850 | \$ - | \$ - | \$ - | #DIV/0! |
| E-Rate | \$ - | \$ - | \$ 67,518 | \$ - | \$ - | \$ - | \$ - | \$ - | #DIV/0! |
| Other Income | \$ 33,281 | \$ - | \$ 56,846 | \$ - | \$ 115,060 | \$ - | \$ - | \$ - | #DIV/0! |
| Total Revenues | \$ 4,547,730 | \$ 4,172,582 | \$ 4,962,492 | \$ 3,987,559 | \$ 4,880,315 | \$ 4,157,238 | \$ 4,304,250 | \$ 147,012 | 3.54% |
| <i>Transfers In From Other Funds</i> | | | | | | | | | |
| Excess and Deficiency Returned | \$ - | \$ 774,620 | \$ 774,620 | \$ 773,064 | \$ 773,064 | \$ 773,064 | \$ 2,088,123 | \$ 1,315,059 | 170.11% |
| Excess and Deficiency Offset by Expenses | \$ - | \$ 2,325,000 | \$ 2,325,000 | \$ 2,399,382 | \$ 2,399,382 | \$ 1,529,244 | \$ - | \$ (1,529,244) | -100.00% |
| Total Transfers | \$ - | \$ 3,099,620 | \$ 3,099,620 | \$ 3,172,446 | \$ 3,172,446 | \$ 2,302,308 | \$ 2,088,123 | \$ (214,185) | -9.30% |
| Total Funding Sources | \$ 4,547,730 | \$ 7,272,202 | \$ 8,062,112 | \$ 7,160,005 | \$ 8,052,761 | \$ 6,459,546 | \$ 6,392,373 | \$ (67,173) | -1.04% |

| | | | | | | | | | |
|-----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|---------------------|--------------|
| NET OPERATING BUDGET | \$ 29,539,262 | \$ 33,394,046 | \$ 30,115,400 | \$ 34,271,424 | \$ 32,230,416 | \$ 35,263,935 | \$ 37,100,869 | \$ 1,836,934 | 5.21% |
|-----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|---------------------|--------------|

Calculation of Individual Town Assessments

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ Difference | % |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|-------|
| Town of Hamilton | | | | | | | | | |
| Capital Debt Assessment "Shift" | | \$ 21,839,706 | | \$ 22,694,537 | | \$ 23,376,462 | \$ 24,456,893 | | |
| Net Operating Assessment | \$ 21,131,336 | \$ 21,839,706 | \$ 21,839,706 | \$ 22,694,537 | \$ 22,694,537 | \$ 23,376,462 | \$ 24,456,893 | \$ 1,080,430 | 4.62% |
| | 64.44% | 65.40% | | 66.22% | | 66.29% | 65.92% | | |
| Town of Wenham | | | | | | | | | |
| Capital Debt Assessment "Shift" | | \$ 11,554,340 | | \$ 11,576,887 | | \$ 11,887,472 | \$ 12,643,976 | | |
| Net Operating Assessment | \$ 11,660,930 | \$ 11,554,340 | \$ 11,554,340 | \$ 11,576,887 | \$ 11,576,887 | \$ 11,887,472 | \$ 12,643,976 | \$ 756,504 | 6.36% |
| | 35.56% | 34.60% | | 33.78% | | 33.71% | 34.08% | | |

FY26 Final Debt Service Budget Calculation

Debt Service Overview

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ | Difference | % |
|---|------------|------------|------------|------------|------------|--------------|--------------|----|------------|--------|
| Debt Service Expense - Gross, before offsets & Overlays | \$ 575,494 | \$ 571,690 | \$ 578,695 | \$ 596,427 | \$ 596,427 | \$ 2,066,694 | \$ 1,947,907 | \$ | (118,787) | -5.75% |

Debt Service Offsets & Funding Sources

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ | Difference | % |
|--|-------------|-------------|-------------|-------------|-------------------|------------------|-------------------|-----------|---------------|---------------|
| Premium on Issuance | \$ - | \$ - | \$ - | \$ - | \$ 73,905 | \$ 73,905 | \$ 107,661 | \$ | 33,756 | 45.68% |
| MSBA Reimbursements | \$ - | \$ - | \$ - | \$ - | \$ 179,006 | \$ - | \$ - | \$ | - | #DIV/0! |
| Total Offsets & Funding Sources | \$ - | \$ - | \$ - | \$ - | \$ 252,911 | \$ 73,905 | \$ 107,661 | \$ | 33,756 | 45.68% |

| | | | | | | | | | | |
|--------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|-----------|------------------|---------------|
| NET DEBT SERVICE BUDGET | \$ 575,494 | \$ 571,690 | \$ 578,695 | \$ 596,427 | \$ 343,516 | \$ 1,992,789 | \$ 1,840,246 | \$ | (152,543) | -7.65% |
|--------------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|-----------|------------------|---------------|

Calculation of Individual Town Assessments

| | FY22 ACT | FY23 BUD | FY23 ACT | FY24 BUD | FY24 ACT | FY25 BUD | FY26 BUD | \$ | Difference | % |
|-------------------------------|------------|------------|------------|------------|------------|--------------|--------------|----|------------|--------|
| <u>Town of Hamilton</u> | | | | | | | | | | |
| Debt Inside the Levy | \$ 84,331 | \$ 84,569 | \$ 83,993 | \$ 92,879 | \$ 92,879 | \$ 111,318 | \$ 74,633 | | | |
| Debt Outside the Levy | \$ 286,517 | \$ 289,316 | \$ 287,613 | \$ 302,075 | \$ 302,075 | \$ 1,209,702 | \$ 1,138,457 | | | |
| Total Debt Service Assessment | \$ 370,848 | \$ 373,885 | \$ 371,606 | \$ 394,954 | \$ 394,954 | \$ 1,321,020 | \$ 1,213,090 | \$ | (107,930) | -8.17% |
| | | 65.40% | | 66.22% | | 66.29% | 65.92% | | | |
| <u>Town of Wenham</u> | | | | | | | | | | |
| Debt Inside the Levy | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | \$ - | | | |
| Debt Outside the Levy | \$ 204,646 | \$ 197,805 | \$ 196,346 | \$ 201,473 | \$ 201,473 | \$ 671,769 | \$ 627,156 | | | |
| Total Debt Service Assessment | \$ 204,646 | \$ 197,805 | \$ 196,346 | \$ 201,473 | \$ 201,473 | \$ 671,769 | \$ 627,156 | \$ | (44,613) | -6.64% |
| | | 34.60% | | 33.78% | | 33.71% | 34.08% | | | |

Essex North Shore Agricultural and Technical School District
FY 2026 Preliminary Budget Summary

| <u>Description</u> | <u>Amount</u> | <u>\$ Incr(Decr)</u> <u>from FY 25</u> | <u>% Incr/-Decr</u> <u>from FY 25</u> |
|---------------------------------------|---------------------|---|--|
| <u>FOUNDATION BUDGET</u> | \$35,247,815 | \$1,102,549 | 3.23% |
| Chapter 70 Aid | 8,661,047 | \$569,267 | 7.04% |
| Local Receipts | 4,205,299 | (\$1,430,869) | -25.39% |
| Foundation Budget Assessment | 22,381,469 | \$1,964,151 | 9.62% |
| <u>TRANSPORTATION BUDGET</u> | 2,396,172 | \$131,671 | 5.81% |
| Regional Transportation Reimbursement | 1,344,548 | (\$15,644) | -1.15% |
| Local Receipts | 625,000 | \$30,000 | 5.04% |
| Transportation Assessment | 426,624 | \$117,315 | 37.93% |
| <u>DEBT SERVICE</u> | 2,205,517 | (\$68,638) | -3.02% |
| Local Receipts | 472,500 | \$55,500 | 13.31% |
| Debt Service Assessment | 1,733,017 | (\$124,138) | -6.68% |
| <u>CAPITAL IMPROVEMENTS</u> | 1,428,062 | \$611,097 | 74.80% |
| Local Receipts | 71,400 | \$3,976 | 5.90% |
| Capital Improvements Assessment | 1,356,662 | \$607,121 | 81.00% |
| <u>GROSS BUDGET</u> | \$41,277,566 | \$1,776,679 | 4.50% |
| Total Estimated State Aid | 10,005,595 | \$553,623 | 5.86% |
| Total Assessment to Communities | 25,897,772 | \$2,564,449 | 10.99% |
| Local Receipts | 5,374,199 | (\$1,341,393) | -19.97% |
| Gross Budget | 41,277,566 | \$1,776,679 | 4.50% |

| Community | Enrollment 1-Oct-23 | Enrollment 1-Oct-24 | Enrollment % incr(decr) | Enrollment Participation Percentage | Foundation Required Minimum Contribution | Above Minimum Assessment | Transportation Assessment | Debt Service Assessment | Capital Improvement Assessment | FY 2026 Preliminary Assessment | FY 2026 Per Pupil Cost | FY 2025 | FY 26 |
|------------|------------------------|------------------------|----------------------------|---|---|--------------------------------|------------------------------|-------------------------------|--------------------------------------|--------------------------------------|------------------------------|-------------------|-------------------|
| | | | | | | | | | | | | Per Pupil Cost | Per Pupil Cost |
| Beverly | 198 | 206 | 4.04% | 13.947% | 3,476,299 | 0 | 59,501 | 241,704 | 189,214 | 3,966,718 | 19,256 | 17,900 | 7.58% |
| Boxford | 25 | 37 | 48.00% | 2.505% | 570,907 | 0 | 10,687 | 43,412 | 33,984 | 658,990 | 17,811 | 18,043 | -1.29% |
| Danvers | 239 | 236 | -1.26% | 15.978% | 3,926,388 | 0 | 68,166 | 276,901 | 216,767 | 4,488,222 | 19,018 | 18,040 | 5.42% |
| Essex | 18 | 16 | -11.11% | 1.083% | 310,008 | 0 | 4,620 | 18,769 | 14,693 | 348,090 | 21,756 | 19,195 | 13.34% |
| Gloucester | 99 | 108 | 9.09% | 7.312% | 1,749,286 | 0 | 31,195 | 126,718 | 99,199 | 2,006,398 | 18,578 | 17,471 | 6.34% |
| Hamilton | 25 | 25 | 0.00% | 1.693% | 424,070 | 0 | 7,223 | 29,340 | 22,968 | 483,601 | 19,344 | 18,456 | 4.81% |
| Lynnfield | 36 | 36 | 0.00% | 2.430% | 603,362 | 0 | 10,367 | 42,112 | 32,967 | 688,808 | 19,134 | 18,241 | 4.89% |
| Manchester | 13 | 9 | -30.77% | 0.609% | 155,004 | 0 | 2,598 | 10,554 | 8,262 | 176,418 | 19,602 | 18,725 | 4.68% |
| Marblehead | 25 | 32 | 28.00% | 2.167% | 551,125 | 0 | 9,245 | 37,554 | 29,399 | 627,323 | 19,604 | 18,725 | 4.69% |
| Middleton | 54 | 62 | 14.81% | 4.198% | 1,067,804 | 0 | 17,910 | 72,752 | 56,953 | 1,215,419 | 19,604 | 18,726 | 4.69% |
| Nahant | 14 | 11 | -21.43% | 0.745% | 189,449 | 0 | 3,178 | 12,911 | 10,107 | 215,645 | 19,604 | 18,726 | 4.69% |
| Peabody | 410 | 451 | 10.00% | 30.535% | 5,838,654 | 0 | 130,270 | 529,177 | 414,257 | 6,912,358 | 15,327 | 14,560 | 5.26% |
| Rockport | 13 | 11 | -15.38% | 0.745% | 241,117 | 0 | 3,178 | 12,911 | 10,107 | 267,313 | 24,301 | 21,286 | 14.17% |
| Salem | 169 | 173 | 2.37% | 11.720% | 2,172,348 | 0 | 50,000 | 203,111 | 159,001 | 2,584,460 | 14,939 | 14,374 | 3.93% |
| Swampscott | 23 | 20 | -13.04% | 1.354% | 365,370 | 0 | 5,776 | 23,465 | 18,369 | 412,980 | 20,649 | 18,958 | 8.92% |
| Topsfield | 25 | 26 | 4.00% | 1.760% | 442,783 | 0 | 7,509 | 30,501 | 23,877 | 504,670 | 19,410 | 17,866 | 8.64% |
| Wenham | 16 | 18 | 12.50% | 1.219% | 297,495 | 0 | 5,201 | 21,125 | 16,538 | 340,359 | 18,909 | 18,128 | 4.31% |
| Total/Avg | 1,402 | 1,477 | | 100.000% | 22,381,469 | 0 | 426,624 | 1,733,017 | 1,356,662 | 25,897,772 | 19,226 | 18,084 | 6.18% |

APPENDIX D
Capital Budget for Fiscal Year 2026

FY26 Capital Plan - Summary

Suggested Funding Source and Amount

| Project: | Cost | Free Cash | Retained Earnings | Total |
|--|-------------------|-------------------|-------------------|-------------------|
| Highway - Roads and Sidewalk Improvements | \$ 350,000 | \$ 350,000 | | \$ 350,000 |
| Facilities/Buildings - COA Building Improvements | \$ 61,000 | \$ 61,000 | | \$ 61,000 |
| Facilities/Buildings - Public Safety Building Improvements | \$ 20,000 | \$ 20,000 | | \$ 20,000 |
| Facilities/Buildings - Patton Park Restrooms | \$ 30,000 | \$ 30,000 | | \$ 30,000 |
| Library - Replace 2nd HVAC Condenser | \$ 163,125 | \$ 163,125 | | \$ 163,125 |
| Police - SUV Cruiser | \$ 71,000 | \$ 71,000 | | \$ 71,000 |
| Police - Replace Portable Radios | \$ 67,000 | \$ 67,000 | | \$ 67,000 |
| Water Dept - Pickup Truck | \$ 90,000 | | \$ 90,000 | \$ 90,000 |
| Total by Category | \$ 852,125 | \$ 762,125 | \$ 90,000 | \$ 852,125 |

APPENDIX E
Water Enterprise Budget for Fiscal Year 2026

| USE OF FUNDS | FY23 ACTUAL | FY24 ACTUAL | FY25 BUDGET | FY26 REQUEST | \$ Change | % Change |
|---------------------------|------------------------|------------------------|------------------------|-------------------------|-------------------|-----------------|
| Permanent Wages | \$ 349,497 | \$ 337,478 | \$ 457,827 | \$ 455,214 | \$ (2,613) | -0.57% |
| Contract Services | \$ 189,901 | \$ 258,100 | \$ 262,600 | \$ 262,000 | \$ (600) | -0.23% |
| Professional Services | \$ 62,406 | \$ 73,700 | \$ 79,700 | \$ 87,700 | \$ 8,000 | 10.04% |
| Equipment Supplies | \$ 16,902 | \$ 21,420 | \$ 21,420 | \$ 21,420 | \$ - | 0.00% |
| Water Supplies | \$ 43,543 | \$ 50,800 | \$ 55,800 | \$ 55,800 | \$ - | 0.00% |
| Misc Expenses | \$ 3,245 | \$ 19,900 | \$ 19,900 | \$ 19,900 | \$ - | 0.00% |
| Debt Service | \$ 723,889 | \$ 842,084 | \$ 842,084 | \$ 955,873 | \$ 113,789 | 13.51% |
| Operating Capital | \$ 142,775 | \$ 135,000 | \$ 77,000 | \$ 137,000 | \$ 60,000 | 77.92% |
| Indirect Costs | \$ 447,893 | \$ 457,313 | \$ 503,647 | \$ 519,659 | \$ 16,012 | 3.18% |
| Prior Year Encumbrance | \$ 11,608 | \$ - | \$ - | \$ - | \$ - | 0.00% |
| Total Use of Funds | \$ 1,991,661 | \$ 2,195,795 | \$ 2,319,978 | \$ 2,514,566 | \$ 194,588 | 8.39% |

APPENDIX F
Community Preservation Committee Budget for Fiscal Year 2026

| USE OF FUNDS | FY25 BUDGET | FY26 REQUEST | \$ Change | % Change |
|-----------------------------------|-------------------|-------------------|------------------|--------------|
| Administration Expense | \$ 30,195 | \$ 30,295 | \$ 100 | 0.33% |
| Debt - Open Space and Recreation | \$ 103,800 | \$ 102,100 | \$ (1,700) | -1.64% |
| Debt - Historic Preservation | \$ 345,424 | \$ 340,650 | \$ (4,774) | -1.38% |
| Transfer to Community Housing | \$ 11,000 | \$ 70,000 | \$ 59,000 | 536.36% |
| Transfer to Historic Preservation | \$ 11,000 | \$ - | \$ (11,000) | -100.00% |
| TOTAL USE OF FUNDS | \$ 501,419 | \$ 543,045 | \$ 41,625 | 8.30% |

Projected FY26 CPA Tax Collected \$ **605,894**

1. Administration Expense

To appropriate \$30,295 of FY26 Community Preservation Fund Revenues for administration costs including, but not limited to, annual Community Preservation Coalition membership fees, signs publicizing CPA projects and salary for part-time Community Preservation Coordinator.

2. Open Space and Recreation - Project Debt

To appropriate \$102,100 from the Community Preservation Unreserved Fund Balance to fund the debt service for the Sagamore Hill Conservation Project. This bond will be paid in full in FY2032.

3. Historic Preservation - Project Debt

To appropriate \$340,650 from the Community Preservation Unreserved Fund Balance to fund the debt service for the Town Hall Renovation Project. This bond will be paid in full in FY2043.

4. Transfers

To transfer \$70,000 from the Community Preservation Unreserved Fund Balance to the Community Housing Reserve.

Appendix G-1
USE REGULATIONS / LARGE ACCESSORY DWELLING UNITS

SECTION 3.1.2 TABLE OF USE REGULATIONS

| E. ACCESSORY | R-1A | R-1B | RA | B |
|---|------------------------------------|------------------------------------|------------------------------------|------------------------------------|
| 1. Up to three boarders in a Single Family Dwelling | Y | Y | Y | Y |
| 2. Conversion for Temporary Additional Living (see Section 3.4). | ZBA | ZBA | ZBA | ZBA |
| 3. <u>2. Accessory Apartment</u> | ZBA | ZBA | ZBA | ZBA |
| 4. 3. Accessory Apartment on Large Lot (see Section 3.7). <u>Large Accessory Dwelling Unit (see Section 11.0)</u> | ZBA <u>PB</u> | ZBA <u>PB</u> | ZBA <u>PB</u> | ZBA <u>PB</u> |
| 5. <u>4. Customary home occupation conducted in a Dwelling or Building accessory thereto by a person residing on the premises (see Section 3.3)</u> | Y | Y | Y | Y |
| 6. <u>5. Accessory Uses or Building on the same Lot with and customarily incidental to a permitted main use on the same site.</u> | Y | Y | Y | Y |
| 7. <u>6. Uses whether or not on the same parcel as activities permitted as a matter of right, which are both(a) accessory to activities permitted as of right, and (b) necessary in connection with scientific research or scientific development or related production (see Section 3.2.1.2).</u> | ZBA | ZBA | ZBA | ZBA |
| 8. <u>7. Parking area or garage for use of employees, customers or visitors.</u> | N | N | N | Y |
| 9. <u>8. Level Two Electric Charging Station.</u> | Y | Y | Y | Y |
| 10. <u>9. Large Family Child Care Home.</u> | ZBA | ZBA | ZBA | ZBA |
| 11. <u>10. Small Family Child Care Home.</u> | Y | Y | Y | Y |
| 12. <u>11. Adult Social Day.</u> | ZBA | ZBA | ZBA | ZBA |
| 13. <u>12. Marijuana Establishment</u> | N | N | N | N |

~~3.4 CONVERSION FOR TEMPORARY ADDITIONAL LIVING AREA. **RESERVED.**~~

3.4.1 Purpose. The purpose of this Section is to provide a way for families to create separate living quarters in their home to accommodate a temporary family, health, or security need by permitting construction of one temporary additional living area in a Single Family Dwelling, or an Accessory Building, subject to the following.

3.4.2 Procedures. A conversion for a temporary additional living area under this Section shall be authorized only by Special Permit issued by the Board of Appeals under Section 10.5 of this Bylaw. The Board of Appeals may grant such a Special Permit provided the following conditions are met:

1. The Board of Health approves all arrangements for sanitary waste, water supply, and drainage.
2. The Occupancy Permit for the Principal Dwelling unit must have been issued at least two (2) years prior to the application for the Special Permit.
3. One (1) of the dwelling units shall be occupied by the owner of the property, except for bona fide temporary absence.
4. The temporary additional living area must be for use by the owner(s), or a family member of the owner(s), or a caretaker or a health care provider to the occupant, of one (1) of the Dwelling Units; or an elderly person; or a mentally or physically handicapped person.
5. There is no other accessory dwelling unit on the lot on which the proposed Accessory Dwelling Unit is to be located.
6. The applicant has submitted to the Board of Appeals a plot plan and scaled architectural drawings which comply with Section 3.4.4 below.

3.4.3 Renewal. Renewal of the Special Permit shall take place every four (4) years from the date of issuance of the Special Permit and upon change of ownership or tenants. Renewal of the Special Permit will require an inspection by the Building Commissioner and a written certification by the owner and Building

Commissioner, verifying that the terms of the Special Permit and this Bylaw are being met. The Building Commissioner shall verify that all means of access and egress have been maintained, and that there has been no change in the occupancy, design, or dimensional standards under this Section.

3.4.4 Design and Dimensional Standards. A plot plan and scaled architectural drawings of the existing dwelling unit, the proposed accessory dwelling unit, and any proposed addition shall be submitted, showing location of the building on the lot, proposed addition, location of septic system and parking, and compliance with this Section and the following items:

1. The maximum Residential Gross Floor Area of the proposed accessory dwelling unit shall not exceed the lesser of one thousand (1,000) square feet or one third (1/3) of the Residential Gross Floor Area of the existing dwelling unit and the proposed accessory dwelling unit combined, as measured after conversion;
2. Any extension to the building shall not create more than a twenty-five (25) percent increase in the Residential Gross Floor Area of the existing structure.
3. The maximum number of bedrooms shall be one (1).
4. The maximum number of tenants shall be two (2).
5. The lot on which the proposed accessory dwelling unit is to be located shall contain at least ten thousand (10,000) square feet.
6. The external appearance of the building in which the Accessory Dwelling Unit is located shall not be significantly altered from a single family dwelling unit.
7. The kitchen facilities shall be of a type readily removable.
8. Adequate provision shall be made for egress to the outside from the accessory dwelling unit; any external stairways shall be screened from view, buffered, or located out of sight from any street.
9. One off-street parking space shall be provided for the new dwelling unit, in addition to the required parking for the Principal Dwelling Unit. Every effort shall be made to minimize the visibility of the additional parking space by location and screening.

~~3.4.5 Other Approvals. The applicant shall, in addition to obtaining a Special Permit, also obtain a Building Permit, any necessary Conservation Commission approvals, and an Occupancy Permit, prior to the occupancy of the Temporary Additional Living Area.~~

~~3.4.6 Special Restrictions:~~

~~1. The occupancy of the apartment shall be by the apartment tenant(s) for whom it was issued. Upon cessation of occupancy by such tenant(s), the permit shall lapse and be null and void the Building Commissioner shall be notified of this event and the kitchen facilities shall be removed by the owner.~~

~~2. One (1) of the dwelling units shall continue to be occupied by the owner of the property, except for bona fide temporary absence.~~

SECTION 3.5 CONVERSION TO TWO-FAMILY DWELLING. [No change]

SECTION 11.0, DEFINITIONS

Section 3.0 Use Regulations [ADD NEW CAPTION FOR SECTION 3.0]

Accessory Use or Building: A use or building which is subordinate and customarily incidental to and located on the same lot with the principal use or building to which it is accessory, except uses accessory to scientific research, scientific development or related production, as set forth in this Bylaw, which uses need not be located on the same lot as the principal use. [EXISTING DEFINITION - No Change]

Large Accessory Dwelling Unit: A Detached Accessory Dwelling Unit, measured in Gross Floor Area, that is larger than 900 square feet but which shall not exceed 2,000 square-feet. In no event may the size of a Large Accessory Dwelling Unit exceed 50 percent of the Gross Floor Area of the Principal Dwelling.

Owner/Ownership: The individual(s) or entity, such as a trust, limited liability company, or corporation, in whom record title is held.

~~Temporary Additional Living Area: See Section 8.1.~~

Appendix G-2
ACCESSORY DWELLING UNITS BY RIGHT

SECTION 3.1.2 TABLE OF USE REGULATIONS

| E. ACCESSORY | R-1A | R-1B | RA | B |
|--|------------------------|------------------------|------------------------|------------------------|
| 3. Accessory Apartment- <u>Accessory Dwelling Unit</u> (see Section 3.6 and definition). | <u>ZBA</u> <u>Y</u> | <u>ZBA</u> <u>Y</u> | <u>ZBA</u> <u>Y</u> | <u>ZBA</u> <u>Y</u> |

3.6 ACCESSORY APARTMENTS

Accessory Apartments

3.6.1. Purpose and Intent

The intent of this section is to allow Apartments in owner-occupied single-family dwellings. Its purpose is to:

1. Add moderately priced rental units to the housing stock to meet the needs of small households, both young and old;
2. Make housing units available to moderate-income households who might otherwise have difficulty finding housing in the town;
3. Provide older homeowners with a means of obtaining rental income, companionship, security and services, and thereby to enable them to stay more comfortably in homes and neighborhoods they might otherwise be forced to leave.

3.6.2. Special Permit Granting Authority

1. The Zoning Board of Appeals is the Special Permit Granting Authority (SPGA) under this Bylaw section.

3.6.3. Procedure

Applications to the SPGA for a Special Permit must provide the following:

1. Be signed by 100% of the record title ownership interest of a single-family detached dwelling and shall include a copy of the deed to the applicant. If ownership is held in other than by an individual, applicant shall submit a Schedule of Beneficiaries or other evidence of ownership satisfactory to the SPGA.
2. Include a floor plan of the Apartment, whether in the main dwelling or a detached structure such as a barn, garage, or other such building on the lot where it is to be located, and all elevations where exterior modifications are proposed. Additionally, a site plan is required to show access, parking, entry, and other essential site features. All plans shall be drawn to scale and identify the existing structure and proposed modifications to create the Apartment.
3. Include written verification by the Board of Health that the sewage disposal system shall have sufficient capacity to accommodate the Apartment within Title 5 of the State Environmental Code and the Rules and Regulations of the Board of Health.

3.6.4. Requirements

1. Modifications of the exterior of the dwelling shall be completed in a manner that maintains the appearance of the dwelling as a single-family dwelling.
2. Modifications of the exterior of the detached accessory building intended to house the Apartment shall maintain the appearance and essential character of the accessory structure.
3. The Apartment will be a complete, separate housekeeping unit that functions as a separate unit from the principal dwelling.

4. The Apartment shall contain no more than two (2) bedrooms and one (1) bathroom; and the apartment shall not exceed 900 S.F. of gross floor area of the building in which the Apartment is to be located.
5. Any new outside entrance to serve an Apartment shall be located on the side or in the rear of the building unless the SPGA deems otherwise appropriate given the layout and function of the building.
6. A landscape plan shall illustrate any new entrances, parking areas and any other added physical development which in the opinion of the SPGA deserves landscape treatment. This provision will not be used as a means to require the pre-existing property to be re-landscaped but will specially focus on the aesthetics of the new site features.
7. The Apartment shall not be held in, or transferred into separate ownership from, the principal dwelling under a condominium or cooperative form of ownership, or otherwise. An Apartment shall not be used in any way for any commercial purpose or activity, regardless of other provisions of the Zoning Bylaw.
8. At least one (1) off street, on site, parking space must be available for exclusive use by occupants of the Apartment or their invitees.
9. In the R-1A, R-1B, and RA Districts, accessory apartments shall not be allowed in single-family dwellings located on lots that are non-confirming for lack of required lot area, unless said lot is at least 10,000 S.F. in size unless the SPGA determines that a lot smaller than 10,000 S.F. is capable of accommodating an Apartment which provides on-site, off-street parking and has confirmation from the Board of Health that the site can address its septic system demands.
10. Alterations to accommodate an Apartment shall be limited to one (1) structure on the lot. If the dwelling is located on a lot smaller than 10,000 square feet, then the alterations shall not expand the footprint or the envelope of the building, as it existed on the effective date of this bylaw section, by more than twenty-five (25) percent, or five hundred (500) S.F., whichever is less.
11. The Owner of the lot shall reside on the property in either the principal dwelling or the accessory apartment.
12. The sanitary disposal system for the Apartment and principal structure shall comply with the applicable Hamilton Board of Health and Title 5 Regulations, provided that compliance of the sanitary disposal system shall not require the application of Subpart E of 310-CMR-15.00.
13. Utilities such as water, electric, oil, and gas necessary for the Apartment shall be extensions of the existing utilities serving the principal single-family dwelling. No new utility services or meters shall be installed for the use of the Apartment.
14. The Special Permit shall be issued to the Owner and shall specify which dwelling unit will be Owner-occupied.
15. The Special Permit shall be recorded at the Registry of Deeds or registered at the local Registry division of the Land Court. Prior to the issuance of a building permit, the applicant must submit proof of the recording or registration of the Special Permit to the Building Inspector and the Director of Planning and Inspections. When a structure which has received a Permit for an Apartment is sold, the new Owner, if he or she wishes to continue to exercise the Permit, must within thirty (30) day of the sale, submit a sworn and notarized written statement to the Building Inspector stating that he or she will occupy either the principal dwelling or the Apartment on the premises as their primary year-round residence.
16. No more than one (1) Apartment shall be allowed on any lot. The creation of an Apartment within a principal single-family residence must be done so that the Apartment either shares a common floor-ceiling assembly with the principal dwelling or a common wall connector as defined in Section 11.0 of this Zoning Bylaw.

17. Violation of any of the above provisions shall be subject to enforcement by the Building Inspector in accordance with the applicable provisions of Section 10.00 Administration and Enforcement of the Zoning Bylaw.

3.6.5 Termination

The Special Permit shall terminate immediately upon any of the following events:

1. ~~Two Years from the date of the grant of the Special Permit, if a substantial use thereof and has not commenced, or in the case of a permit for construction, if construction has not commenced within one year from the date of the grant of the Special Permit.~~
2. ~~Violation of any term or condition of the Special Permit that the Owner fails to cure within two weeks' written notice mailed by certified mail, return receipt requested.~~

DEFINITIONS

~~Apartment: An additional dwelling unit, subordinate in size and accessory to the principal dwelling unit on the lot, located in either the principal dwelling or an accessory structure on the lot. An Apartment is constructed so as to maintain the appearance and essential character of the single family dwelling or accessory structure to which it is added.~~

~~Owner: The individuals in whom record title ownership is held. If ownership is held in a trust or other non-individual ownership, the beneficiaries as shown on a Schedule of Beneficiaries or other evidence of ownership.~~

3.6 ACCESSORY DWELLING UNITS.

3.6.1 Purpose. The intent of this Section is to permit an Accessory Dwelling Units (see Section 11.0, Definitions) on a Lot that contains a principal dwelling unit (hereinafter referred to as the Principal Dwelling unit) for the following purposes:

1. Add moderately priced rental units to the housing stock to meet the needs of small households, both young and old;
2. Make housing units available to moderate-income households who might otherwise have difficulty finding housing in the Hamilton;
3. Provide homeowners with a means of obtaining rental income, companionship, security, and services, and thereby enabling them to stay more comfortably in homes and neighborhoods they might otherwise be forced to leave; and
4. Provide more diverse housing options in the community in a manner that does not conflict with the residential character of single-family neighborhoods.

3.6.2 Permit Granting Authority. The Building Commissioner shall be the permit-granting authority for Accessory Dwelling Units provided that the application meets the minimum requirements of this Section. In considering applications, all definitions contained in this Bylaw shall apply, unless those definitions conflict with the definitions in the Regulations governing Protected Use Accessory Dwelling Units in which case the definitions in the Regulations shall control (see 760 CMR 71.01 et seq.).

3.6.3 Where Permitted. An Accessory Dwelling Unit shall be permitted by right in all Single-Family Residential Zoning Districts, provided that the Accessory Dwelling Unit meets the minimum requirements of this Section. Accessory Dwelling Units may be attached to the Principal Dwelling unit (hereinafter referred to as an Attached Accessory Dwelling Unit) or located in a separate accessory structure (hereinafter referred to as a Detached Accessory Dwelling Unit).

3.6.4 Required Application Materials for Accessory Dwelling Units. An Application for a building permit to construct an Accessory Dwelling Unit must include the following minimum materials:

- 1. A Building Permit application showing compliance with the requirements of this Section of the Bylaw, the Building Code, and all other applicable requirements, including, but not limited to, those governing the Hamilton Historic District.**
- 2. A Certified Plot Plan demonstrating compliance the Zoning Bylaw and all other applicable codes and regulations.**
- 3. Elevations depicting all building facades of the Accessory Dwelling Unit. The elevations shall include all exterior building materials.**
- 4. Written verification from the Board of Health that the sewage disposal system(s) shall have sufficient capacity to accommodate the Accessory Dwelling Unit in accordance with Title 5 of the State Environmental Code and the Rules and Regulations of the Board of Health.**

3.6.5 Requirements for Accessory Dwelling Units. All Accessory Dwelling Units are subject to the following requirements:

- 1. Only one Accessory Dwelling Unit shall be permitted on each Lot containing a Principal Dwelling Unit.**
- 2. An Accessory Dwelling Unit shall not exceed 50 percent of the Gross Floor Area of the Principal Dwelling Unit or 900 square feet of Gross Floor Area, whichever is smaller.**
- 3. An Accessory Dwelling Unit shall meet the applicable dimensional requirements set forth in Section 4.1.2, Table of Dimensional Regulations, including Regulations for Maximum Building Height, Maximum Number of Stories, Maximum Building Coverage, and Minimum Front, Side and Rear yards, except as stipulated in this Section.**
- 4. An Accessory Dwelling Unit must have a permanent foundation; no trailers or recreational vehicles shall be permitted to serve as such a use.**
- 5. An Attached Accessory Dwelling Unit shall maintain the appearance and essential character of the Principal Dwelling unit, specifically with respect to height, compatible roof pitch, and choice of building materials.**
- 6. A Detached Accessory Dwelling Unit shall not be permitted in the Front Yard (as defined under Section 11.0, Definitions) of the Lot, absent a special permit.**
- 7. The location of any new outside entrance to serve an Attached Accessory Dwelling Unit shall be located on the side or in the rear of the Principal Dwelling unit.**
- 8. Appurtenant uses exclusively serving an Accessory Dwelling Unit that do not count toward the maximum Gross Floor Area, including porches, decks, and similar structures, shall be limited to a combined total size of no more than one hundred and fifty (150) square-feet.**
- 9. The Accessory Dwelling Unit shall not be held in, or transferred into separate ownership from, the Principal Dwelling unit under a condominium, cooperative or any other similar form of collective ownership.**
- 10. A Detached Accessory Dwelling Unit shall have its own house number visible from the exterior of the unit.**
- 11. At least one (1) off-street, on-site parking space shall be provided for exclusive use by occupants(s) of the Accessory Dwelling Unit or their invitees, unless the Accessory Dwelling Unit is within 0.5 miles of a commuter rail station or Bus Station**
- 12. No additional curb cut shall be authorized for access to serve an Accessory Dwelling Unit.**
- 13. There shall be no more than one swimming pool and one detached garage on any Lot with an Accessory Dwelling Unit.**

14. Short term rentals as defined in G.L. c. 64G, §1 are prohibited in Accessory Dwelling Units.

15. An Accessory Dwelling Unit proposed in the Hamilton Historic District, which requires exterior alterations, shall meet all the applicable requirements of the Historic District Bylaw (Chapter XXXI) including review and approval by the Historic District Commission if necessary.

SECTION 11.0 DEFINITIONS

Section 3.0 Use Regulations [*ADD NEW CAPTION FOR SECTION 3.0*]

Accessory Dwelling Unit: A self-contained housing unit, inclusive of sleeping, cooking and sanitary facilities on the same Lot as a Principal Dwelling, subject to otherwise applicable dimensional and parking requirements, that:

(a) maintains a separate entrance, either directly from the outside or through an entry hall or corridor shared with the Principal Dwelling sufficient to meet the requirements of the Building Code for safe egress;

(b) is not larger in Gross Floor Area than ½ the Gross Floor Area of the Principal Dwelling or 900 square feet, whichever is smaller; and

(c) is subject to such additional restrictions as may be imposed by a municipality including, but not limited to, additional size restrictions, and restrictions or prohibitions on Short-term Rental as defined in section 1 of chapter 64G.

Appendix H
INCLUSIONARY HOUSING

8.3 INCLUSIONARY HOUSING.

8.3.1 Purpose. The purpose of the Inclusionary Housing Bylaw is to:

1. Produce high-quality Affordable Housing Units to **for** Low- or Moderate-Income Households;
2. Encourage more housing choices in Hamilton;
3. Promote geographic distribution of Affordable Housing Units throughout the Town and avoid over-concentration; and
4. Assist the Town in creating units eligible, **through means other than a Comprehensive Permit, for the Chapter 40B Subsidized Housing Inventory managed by the Executive Office of Housing and Livable Communities (EOHLC) or its successor.** ~~through means other than a comprehensive permit.~~

8.3.2 Applicability. This Section applies to all developments involving the creation of ten (10) or more Dwelling units or ten (10) or more lots for residential use.

8.3.3 Segmentation Prohibited. Developments may not be segmented to avoid compliance with this Section. Divisions of land that would cumulatively result in an increase by ten (10) or more residential ~~lots~~ or ~~d~~ Dwelling units above the number existing on any parcel or any contiguous parcels in common ownership in the ~~twenty-four (24)~~ **thirty-six (36)** months prior to any application for development under this Bylaw or the Subdivision Control Law are subject to this Section. For purposes of this Section, a division of land shall mean any division of land subject to G.L. c. 41, s. ~~§§~~81K-81GG.

8.3.34 Mandatory Provision of Affordable Housing Units. In any development subject to this Section, the tenth dwelling unit and every seventh unit thereafter shall be an Affordable Housing Unit. Nothing in this Section shall preclude a developer from providing more Affordable Housing Units than are required hereunder.

For example, in the case of a proposed 50-unit development project subject to this Section, the project is required to provide six (6) Affordable Housing Units, namely one each for the 10th, 17th, 24th, 31st 38th and 45th units, for a total of six (6) Affordable Housing Units included in the total of 50 units in the development project.

8.3.45 Methods of Providing Affordable Housing Units. **In addition to providing on-site Affordable Housing Units,** ~~the~~ Planning Board may approve one (1) or more of the following methods, or any combination thereof, for the provision of Affordable Housing Units:

1. The Affordable Housing Units may be constructed or rehabilitated on a locus different from that of the development. The Planning Board may allow a developer of non-rental dwelling units to develop, construct or otherwise provide Affordable Housing Units reasonably equivalent to those required by this Section in an off-site location in the Town of Hamilton. All requirements that apply to on-site provision of Affordable Housing Units shall apply to provision of off-site Affordable Housing Units. In addition, the location of the off-site Affordable Housing Units shall be approved by the Planning Board as an integral element of the development review and approval process.
2. A donation of land may be made in lieu of providing Affordable Housing Units. An applicant may offer, and the Planning Board may accept, subject to approval of the Board of Selectmen,

donations of land in fee simple, on-or off-site, that the Planning Board determines are suitable for the construction of an equivalent number of Affordable Housing Units. Land donated for this purpose shall be subject to a restriction assuring its use for affordable housing. Prior to accepting land as satisfaction of the requirements of this Section, the Planning Board may require the applicant to submit an appraisal or other data relevant to the determination of suitability for an equivalent number of Affordable Housing Units.

3. An equivalent fee in lieu of units may be made. A fee in lieu of payment for each required unit shall be 3 times the Area Median Income (AMI) as determined by HUD (the US Department of Housing and Urban Development (HUD) for the Boston-Cambridge-Quincy, MA-NH Metro FMR Area that income limits which includes Hamilton and for the most recent available data year. AMI shall be used and the equivalent fee in lieu calculated in accordance with this Section regardless of unit size or the number of persons likely to occupy each required unit.

8.3.56 General Provisions. The Planning Board shall be charged with administering this Section and shall may promulgate Inclusionary Housing Rules and Regulations, including but not limited to submission requirements and procedures, application and review fees, minimum requirements for a marketing plan, and documentation required by the Town to qualify the Affordable Housing Units for listing on the Chapter 40B Subsidized Housing Inventory.

1. Affordable Housing Units shall be dispersed throughout the Building(s) in a development and shall be comparable to market housing units in terms of location, quality and character, room size, bedroom distribution, and external appearance.
2. The selection of qualified purchasers or qualified renters shall be carried out under a marketing plan approved by the ~~Planning Board~~ **EOHLC or its successor** and shall comply with Local Initiative Program guidelines. The marketing plan must describe how the applicant will accommodate local preference requirements, if any, established by the Board of Selectmen.
3. Developers may sell Affordable Housing Units to the Town of Hamilton, the Hamilton Housing Authority, or to any non-profit housing development organization that serves the Town of Hamilton, in order that such entity may carry out the steps needed to market the Affordable Housing Units and manage the choice of buyers.
4. Developers shall be responsible for preparing applications and other documentation required by the ~~Department of Housing and Community Development (DHCD)~~ **EOHLC or its successor** to assure that the Affordable Housing Units are eligible for listing on the Chapter 40B Subsidized Housing Inventory.

8.3.67 Timing of Construction. Unless a different schedule is approved by the Planning Board, Affordable Housing Units shall be provided in proportion to the development of market-rate units, but in no event shall the construction of Affordable Housing Units, the payment of fees in lieu of constructing Affordable Housing Units, or the provision of off-site Affordable Housing Units be delayed beyond the schedule below. Fractions shall be rounded to the nearest whole number.

| % Building Permits Issued for Market Rate Units | % Affordable Units (Building Permits, Fees, Off-Site Units, or Land, as Applicable) |
|--|--|
| Up to 29% | None required |
| 30% | At least 10% |
| 50% | At least 30% |
| 70% | At least 50% |
| 85% | At least 70% |
| 90% | 100% |

8.3.78 Certificate of Occupancy. A Certificate of Occupancy for an Affordable Housing Unit shall not be issued until the applicant submits evidence to the Building Commissioner that an Affordable Housing Restriction or a regulatory agreement for the project has been approved by the Planning Board.

8.3.89 Preservation of Affordability; Restrictions on Resale. An Affordable Housing Unit created in accordance with this Section shall be subject to an Affordable Housing Restriction or regulatory agreement that contains limitations on use, resale and rents. The Affordable Housing Restriction or regulatory agreement shall meet the requirements of the Town and the Local Initiative Program, and shall be in force for the maximum period allowed by law.

1. The affordable housing restriction or regulatory agreement shall be enforceable under the applicable provisions of G.L. c. 184, as amended.
2. The Planning Board shall require that the applicant comply with the mandatory provision of Affordable Housing Units and accompanying restrictions on affordability, including the execution of the Affordable Housing Restriction or regulatory agreement.
3. All documents necessary to ensure compliance with this Section shall be subject to the review and approval of the Planning Board and, as applicable, Town Counsel. Such documents shall be executed prior to and as a condition of the issuance of any Certificate of Occupancy.
- 4. An Affordable Housing Unit approved under this bylaw shall be deed restricted as Affordable Housing Unit(s) in perpetuity or for so long as allowed by law.**

Appendix I SITE PLAN REVIEW

10.6 SITE PLAN REVIEW.

~~10.6.1 Purpose.~~ Site Plan Review is intended to allow the Town to review and impose reasonable conditions on development, allowed as of right or by Special Permit, which by its nature or location has the potential for significant impacts on traffic circulation, public safety, public utilities, the environment and neighborhood character and appearance. The purpose is to provide a mechanism and a process for fitting the proposed development to neighborhood character, scale, and infrastructure, and to reasonably protect the Town and abutting property owners from potential negative impacts. These purposes are to be served by providing for consistent submissions of thorough data for each proposal for Town review; and for consideration by Town Boards as specified below, in terms of specific criteria; and for issuance of a Site Plan Decision setting whatever terms and conditions, if any, are necessary to achieve the purposes of Site Plan Review, consistent with Town Bylaws and Regulations. Provision is made to exempt small modifications and improvements from portions of this Section, and to coordinate Site Plan Review with other required review of Special Permits and alteration of nonconforming uses and structures.

~~10.6.2 Projects Requiring Approval.~~ No Building Permit shall be applied for or issued for any construction or alteration subject to this Section, as specified below, until a site plan has been approved or conditionally approved by the Planning Board as set forth herein. Except as exempted in the Bylaw, Site Plan Review shall be required for the following construction, alterations, and uses:

- ~~1. Any new construction or alteration or expansion of, or conversion to a business, office, industrial, institutional, or multi-family residence building or structure in any district;~~
- ~~2. Any alteration or extension of a nonconforming commercial, industrial, or institutional structure in a Residential Zone;~~
- ~~3. Parking lots over five (5) spaces serving any of the above-listed types of buildings, schools, hospitals, nursing homes, long term care facility, life care facilities, children's camps, campgrounds, churches, multi-family structures for more than two (2) families, government buildings and structures, farm stands, and buildings in commercial, and/or office use;~~
- ~~4. Industrial and scientific research use under Section 3.2;~~
- ~~5. Stables providing boarding and/or services for more than six (6) horses other than those owned by the residents of the Lot on which the stable is located;~~
- ~~6. Greenhouses for commercial production of plants or produce;~~
- ~~7. Interior alterations which increase the commercial, industrial, institutional or multi-family floor area within an existing building, and/or which change the number of separately leasable or saleable spaces within an existing building; and~~
- ~~8. Wind Energy Facilities in the Commercial Overlay District.~~

~~10.6.3 Projects Requiring Abbreviated Site Plan Review.~~ Proposed additions or alterations to existing buildings subject to Site Plan Review which would either add new floor area totaling less than ten (10) percent of the current ground floor area of the existing building, or which are estimated to cost less than ten (10) percent of the current one hundred (100) percent assessed valuation of the building shall require only Abbreviated Site Plan Review as provided below. For purposes of applying this guideline, when ground floor area includes attached residential floor area or attached commercial greenhouses, the area of the residential and/or greenhouse portions shall be deducted before applying the ten (10) percent threshold factors.

~~10.6.4 Exemptions from Site Plan Review.~~ The following activities shall not require Site Plan Review or Abbreviated Site Plan Review:

- ~~1. Interior alterations unless the alterations increase the floor area within the building devoted to any of the uses listed in Section 10.6.2 and/or change the number of separately leasable or saleable spaces within~~

the Building. Examples of exempt interior alterations are: paneling, shelving, partitions other than those creating new commercial units, counters, flooring and general interior decoration;

2. Repairs, repainting, residing, reroofing and window replacement unless the activity also increases floor area;

3. Replacement of parts of a partially damaged building that would normally require Site Plan Review with generally identical portions. Total replacement of such a destroyed building shall require Site Plan Review;

4. Demolition of a building or structure;

5. Change of tenant of commercial building unless there is also new construction triggering Site Plan Review;

6. Customary home occupations;

7. Townhouse or Multifamily housing developed under Sections 8.1 (OSFPD) or 8.2 (Senior Housing);

8. Uses permitted by Special Permit within the Commercial Overlay District; and

9. Entries B.1, B.3, and B.7 in the Table of Uses shall require Site Plan Review under Section 10.7.

10.6.5 Site Plan Review; Procedures. The applicant shall file twenty-four (24) copies of all Site Plan Review materials as specified below, accompanied by a fee and the documentation required by the Planning Board Instruction Sheet. The application shall be submitted to the Town Clerk. The application will not be considered legally submitted, for purposes of starting the review "clock", until it is complete and all copies are submitted.

1. The Town Clerk shall thereafter forward ten (10) copies to the Planning Board and one (1) copy each to the Building Commissioner, Department of Public Works, Board of Selectmen, Board of Health, Conservation Commission, Police Department, Fire Department, and Office on Disability for their comments, retaining one copy for the Town Clerk file.

2. An electronic copy of the application, including plans and drawings, shall also be submitted at the time of application, unless waived by the Planning Board.

3. The applicant is encouraged to meet informally with any of the above-listed boards, officials, or departments for their recommendation.

4. The above-listed boards, officials, or departments shall transmit their comments in writing to the Planning Board within thirty-five (35) days from the date of application. Failure to submit comments shall be deemed a lack of opposition to the project.

10.6.6 Site Plan Review; Hearing and Decision. The Planning Board shall open a Public Hearing within sixty-five (65) days of the date of an application. The Planning Board shall provide notice as set forth in G.L. c. 40A, s. 11. The Planning Board shall make its determination within sixty-five (65) days of the closing of the Public Hearing, unless the applicant specifically grants an extension of the review period in writing. Failure to decide within sixty-five (65) days of the closing of the Public Hearing shall constitute approval of the site plan by the Planning Board unless the applicant granted an extension of the review period.

1. When proposed new construction or alteration is subject to both site plan review and a Planning Board Special Permit, the Planning Board shall conduct both processes simultaneously, using the time limits of the Special Permit process to cover both reviews.

10.6.7 Abbreviated Site Plan Review; Procedures. If the proposed construction and/or change of use are eligible for Abbreviated Site Plan Review under Section 10.6.3, the applicant shall file eight (8) copies of the materials required below with the Town Clerk, along with the fee and accompanying documents as required by the Planning Board Instruction Sheet. The application will not be considered legally submitted until it is complete.

1. The Town Clerk shall forward five (5) copies to the Planning Board, and one (1) copy to the Building Commissioner, retaining one copy for the Town Clerk file.

2. The above-listed boards or officials shall transmit their comments in writing to the Planning Board within thirty (30) days from the date of application. Failure to submit comments shall be deemed a lack of opposition to the project.

10.6.8 Abbreviated Site Plan Review; Hearing and Decision. The procedures set forth in Section 10.6.3 shall apply.

10.6.9 Site Plan Review; Contents. Unless waived by the Planning Board, all site plans shall be prepared to scale and be of professional quality. The application shall be prepared by a Registered Architect or Professional Engineer for any proposal that requires such certification under the State Building Code. All site plans shall be standard seventeen (17) inch by twenty four (24) inch or twenty four (24) inches by thirty six (36) inch sheets and shall be prepared at a sufficient scale to show the following required items:

1. Location and boundaries of existing (and proposed) lot, adjacent streets or ways, including rights of way and easements, and the location and owner names of all adjacent properties;
2. Size of the lot, lot frontage and yards;
3. All existing and proposed buildings and structures, including dimensions;
4. Elevation drawings (architectural appearance) of the building or building with addition, from each side. For additions/alterations, show only the affected sides;
5. Location and dimensions of all parking and loading areas, driveways, walkways, access and egress points, specifically as they relate to Street traffic; number of parking spaces, with note comparing total to the requirements of Section 6.1; and indication of facilities for handicapped access per the requirements of the Architectural Access Board;
6. If the project includes any grading and site work, topography of the site at two (2) foot intervals based on USGS data, showing both existing and proposed contours;
7. Location and description of all existing and proposed sewerage disposal and treatment systems, and underground storage tanks, water supply, storm drainage systems, utilities, and refuse disposal dumpsters;
8. Location, height, and type of all external lighting;
9. Location, height, dimensions and appearance of signs;
10. Proposed landscaping including the location and description of existing large trees;
11. Proposed screening, buffers, fencing, plantings, open spaces and recreation areas; and
12. Statement of any other local and/or state permits required for the project.

10.6.10 Site Plan Review; Other Materials. In addition to the site plan, the applicant shall submit the following materials:

1. Completed Site Plan Application form available in Town Clerk's office.
2. Unless waived, all of the information required to demonstrate compliance with the performance standards set forth in Section 6.4.
3. When the Planning Board deems it necessary, it may require the applicant to provide at his expense supplemental data on traffic impact, including estimated daily and peak hour vehicle trips to be generated by the site, estimated number of employees and truck delivery schedule and hours of business.
4. When deemed necessary by the Planning Board, the applicant shall provide at his expense supplemental data and analysis on potential environmental impacts of the proposed project on air quality, surface and groundwater quality, site and neighborhood drainage conditions. The Planning Board may require that such studies be prepared by registered engineers or other appropriately qualified individuals.
5. When deemed necessary by the Planning Board, the applicant shall pay a review fee to cover the reasonable costs of consultants engaged by said Board to assist in review of the proposed site plan, as authorized and limited by G.L. c. 44, s. 53G and the Rules and Regulations of the Planning Board.

10.6.11 Abbreviated Site Plan Review; Plans and Submission Contents. For projects qualifying for Abbreviated Site Plan Review under Section 10.6.3, the basic plan standards shall apply, and the plan shall show items 1, 2, 3, 5, and 7 of the plan requirements of Section 10.6.9 and only those elements of the remaining items that will be changed by the proposed construction or alteration. Along with the abbreviated site plan, the applicant shall submit a completed Site Plan Application Form available from the Town Clerk's office.

10.6.12 Site Plan Standards. The following standards shall be considered in the review and evaluation of a site plan or abbreviated site plan:

1. The plan shall show compliance with Zoning Bylaw requirements for parking, signage, loading, landscaping, performance standards, dimensional requirements, and all other applicable requirements of this Bylaw;
2. The proposed project should be compatible with existing natural features of the site and compatible in architecture and scale with the surrounding area;
3. The plan shall provide landscaping and open spaces that enhance the proposed development from within and without, which provide screening and buffers as necessary and which maximize amenity for customers, neighbors, and the general public;
4. The proposed project shall provide for safe and convenient vehicular and pedestrian movement within the site in relation to adjacent ways, and provide for compliance with handicapped access requirements, and provide for access and egress by emergency vehicles;
5. The proposed project shall provide for location and screening of exposed storage areas, machinery, service areas, dumpsters, utility buildings and structures and other unsightly uses to maximize amenity for neighborhood. The Planning Board may require landscaping and/or fencing to provide needed buffers;
6. The proposed plan shall be consistent with the capacity of local infrastructure, such as water supply, utilities, drainage and Streets, or shall provide for such improvements as necessary; and
7. The plan shall provide for compliance with Board of Health, Conservation Commission, and other Town and State Regulations. Where applicable, the approval may be made conditional upon Board of Health, Conservation Commission, State Department of Public Works or other approvals, which shall be specifically referenced in the decision.

10.6.13 Final Action. With regard to both site plans and abbreviated site plans, the Planning Board conducting the site plan review shall take one (1) of the following final actions:

1. A written approval of the plan, with a determination that the proposal meets the criteria set forth in this Bylaw; or
2. A written denial of the application stating the reasons for such denial; or
3. A written approval subject to any conditions, modifications, and restrictions as the Planning Board may deem necessary, including phasing of construction and a performance guarantee for any public improvements;
4. The decision shall be filed with the Town Clerk.

10.6.14 Implementation of Site Plans. Construction under an approved site plan or abbreviated site plan shall begin within one (1) year and be completed within two (2) years of the date of the filing of the decision with the Town Clerk, unless extension is granted by the Planning Board. Otherwise approval shall lapse.

10.6.15 Appeal. The decision of the Planning Board may be appealed to a court of competent jurisdiction as set forth in G.L. c. 40A, s. 17.

10.6 SITE PLAN REVIEW

10.6.1 Purpose. Site Plan Review is intended to allow the Town to review an application by a property owner, or the legal representative of the property owner, and impose reasonable conditions on development, allowed as of right or by Special Permit, which by its nature or location has the potential for significant impacts on traffic circulation, public safety, public utilities, the environment, and neighborhood character and appearance.

1. Pursuant to Section 10.4 of the Zoning Bylaw, the Planning Board shall hear and decide applications for Site Plan Approval and effectuate the purposes of this bylaw by providing for consistent submissions of thorough data for each proposal for Planning Board review; and for input by Town boards as specified below, in terms of specific criteria; and for issuance of a Site Plan Decision setting forth terms and conditions, if any, that are necessary to achieve the purpose of Site Plan Review, consistent with Town Bylaws and Regulations.

2. The purpose is to provide a mechanism and a process for fitting the proposed development to neighborhood character, scale, and infrastructure, and to reasonably protect the Town and abutting property owners from potential negative impacts.
3. The purpose is served by establishing an exemption for small modifications and improvements from some of the requirements of this Section, and to coordinate Site Plan Review with other required review of Special Permits.

10.6.2 Site Restrictions. A Site Plan Review application shall not be acted upon unless the applicant demonstrates compliance with the following Bylaws and Regulations, if applicable:

1. Article XVII of the General Bylaw, General Wetlands Protection/Conservation Bylaw, and associated Regulations;
2. Article XXIX of the General Bylaw, Stormwater Management, and associated Regulations;
3. The Groundwater Overlay Protection District;
4. The Flood Plain Overlay District; and
5. Board of Health approval for the use of an on-site sewage disposal system.

Compliance may be addressed as a condition of approval.

10.6.3 Pre-Application Conference. A Pre-Application Conference is encouraged prior to the submission of a Site Plan Review application.

1. Types of Applications for which a Pre-Application Conference is encouraged:
 - a. Expansion projects of non-residential or multi-family buildings which increase the gross floor area by 1,000 square feet or more;
 - b. All new non-residential or multi-family structures larger than 350 square feet in size;
 - c. Exterior site improvements on non-residential or multi-family properties exceeding 2,000 square feet in area; or
 - d. Communication towers and telecommunication antenna facilities or small wireless facilities.
2. Purpose of the Pre-Application Conference: The purpose of this conference is to familiarize the Planning Board with the basic concept of the proposed plan and to provide a venue for both the applicant and the Planning Board to discuss the project in advance of a formal Site Plan Review application. The Pre-Application Conference is further designed to acquaint the applicant with the Site Plan Review Application process and any particular information the Board may request to aid the Board in its review of the application.
3. Minimum Pre-Application Conference Materials: The applicant is encouraged to provide the following materials to the Planning Board in advance of the Pre-Application Conference:
 - a. A Pre-Application Conference application form; and
 - b. A site plan, which may be conceptual, that is sufficiently clear to illustrate the nature of the proposed improvements and the general existing conditions of the site, including the bounds of the property, topography, and existing structures. The applicant, where applicable, also should identify, delineate, and address through project design the protection of areas for conservation, including regulated areas such as wetlands, riverfront areas, and floodplains, and unprotected areas and features such as steep slopes, mature woodlands, farmland, meadows, wildlife habitats/ corridors, and existing historic, cultural, or recreation resources. The Planning Board may suggest methods for resolving potential challenges in the design

and layout of the proposed development and identify the site's important natural, historic, and recreational features and connections as well as areas the Town would prefer to see preserved as open space. Applicants are encouraged to schedule a Pre-Application Conference before expending significant sums on site engineering and application preparation.

4. Limits of the Review: Neither the applicant nor the Planning Board shall be bound by the discussions at the Pre-Application Conference. However, the Planning Board shall be entitled to make recommendations with respect to the materials presented to assist the applicant in preparing a formal application that will meet the development standards of the Town of Hamilton as expressed in the Zoning Bylaw and the Site Plan Regulations.

5. Participation of other Boards or Departments: The Planning Board may, at its discretion, invite other boards, commissions, or officials to participate in the Pre-Application Conference. Such bodies or officials may include, but shall not be limited to, the Board of Health, Building Commissioner, Conservation Commission, Select Board, Town Manager, Department of Public Works Director, Fire Chief, Police Chief, Historic District Commission, and Environmental Impact Committee.

6. Separation from Site Plan Review Application Process: The Planning Board shall schedule the Pre-Application Conference within 21 days of application submission. The Pre-Application Conference is a separate process from Site Plan Review and shall not be counted toward the review "time clock" as stipulated under Section 10.6.11.

10.6.4. Projects Requiring Approval. No Building Permit shall be applied for or issued for any construction or alteration subject to this Section, as specified below, until a site plan has been approved by the Planning Board as set forth herein. Except as exempted in the Bylaw, Site Plan Review shall be required for the following construction, alterations, and uses:

1. Any new construction or changes to an existing structure for the purpose of altering, expanding, or converting to either a business, office, industrial, or a multi-family residential type use, in any district;
2. Parking lots over five (5) spaces serving any of the above-listed types of buildings, schools, hospitals, nursing homes, long term care facility, life care facilities, children's camps, campgrounds, churches, multi-family structures for more than two (2) families, government buildings and structures, farm stands, and buildings in commercial, and/or office use;
3. Any industrial and scientific research use under Section 3.2 of the Zoning Bylaw;
4. Stables providing boarding and/or services for more than six (6) horses other than those owned by the resident(s) of the Lot on which the stable is located;
5. Greenhouses for commercial production of plants or produce;
6. Alterations which increase the commercial, industrial, institutional, or multi-family floor area within an existing building, and/or which change the number of separately leasable or saleable spaces within an existing building; and
7. Wind Energy Facilities in the Commercial Overlay District.

10.6.5 Projects Eligible for Abbreviated Site Plan Review. Proposed additions or alterations to existing buildings subject to Site Plan Review which would either add new floor area totaling less than ten (10) percent of the current ground floor area of the existing building, or which are estimated to cost less than ten (10) percent of the current one hundred (100) percent assessed valuation of the building are eligible for Abbreviated Site Plan Review. Applicants should consult with the Planning Director to confirm that an application is eligible for Abbreviated Site Plan Review prior to application submittal.

10.6.6. Projects Exempt from Site Plan Review. The following activities shall not require Site Plan Review or Abbreviated Site Plan Review:

- 1. Alterations unless the alterations increase the floor area within the building devoted to any of the uses listed in Section 10.6.4 and/or change the number of separately leasable or saleable spaces within the Building. Examples of exempt interior alterations are paneling, shelving, partitions other than those creating new commercial units, counters, flooring, and general interior decoration;**
- 2. Repairs, repainting, residing, reroofing and window replacement unless the activity also increases floor area;**
- 3. Replacement of parts of a partially damaged building that would normally require Site Plan Review with generally identical portions. Total replacement of such a destroyed building shall require Site Plan Review;**
- 4. Demolition of a building or structure;**
- 5. Change of tenant of commercial building unless there is also new construction triggering Site Plan Review;**
- 6. Customary home occupations;**
- 7. Townhouse or Multifamily housing developed under Sections 8.1 (OSFPD) or 8.2 (Senior Housing);**
- 8. Uses permitted by Special Permit within the Commercial Overlay District; and**
- 9. Entries B.1, B.3, and B.7 in the Table of Use Regulations shall require Site Plan Review under Section 10.7.**

10.6.7. Site Plan Review Application Contents. The Planning Board shall be empowered to adopt and enforce Site Plan Review Regulations documenting the minimum application submission contents required for Site Plan Review and Abbreviated Site Plan Review processes. These Regulations shall be binding upon applicants unless waived by the Planning Board.

10.6.8. Site Plan Review and Abbreviated Site Plan Review Procedures. At the time of submission, the applicant shall file all required application materials with the Hamilton Planning Department and one copy of all application materials shall also be filed with the Hamilton Town Clerk. The application will not be considered legally submitted, for purposes of starting the review “clock,” as stipulated under Section 10.6.11, until it is complete, and all copies are submitted.

- 1. The Planning Department shall thereafter transmit the electronic application materials to the Building Commissioner, Department of Public Works, Town Manager, Select Board Chair, Board of Health, Conservation Commission, Police Department, Fire Department, and Environmental Impact Committee for comments. Additional physical copies of the application materials shall be retained by the Planning Department for review if requested by a board, commission, or official.**
- 2. The above-listed boards, officials, and departments shall transmit their comments in writing to the Planning Board within thirty (30) days from the date of application. Failure to submit comments shall be deemed determinative that the affected party does not have comments to share on the application.**

10.6.9. Design Review. The Planning Board, at its discretion, may request the Select Board to form a Design Review Committee and adopt Design Review Guidelines to assist the Planning Board in reviewing larger scale Site Plan Review applications. The Design Review Guidelines, if adopted by the Planning Department, shall identify the scale of projects which require Design Review. The Design Review Committee, if formed, shall be empowered to provide recommendations to the Planning Board concerning the site design and architecture of the proposed development.

10.6.10. Site Plan Standards. The following standards shall be considered in the review and evaluation of a site plan or abbreviated site plan:

- 1. The plan shall show compliance with Zoning Bylaw requirements for parking, signage, loading, landscaping, performance standards, dimensional requirements, and all other applicable requirements of this Bylaw;**
- 2. The proposed project should be guided by and integrated into existing natural features of the site and should be complementary with the architecture in scale and detail in the surrounding area;**
- 3. The plan shall provide landscaping and open spaces that are integrated with the proposed development from within and without, which provide screening and buffers as necessary and which maximize amenity, enjoyment and safety for customers, neighbors, and the general public;**
- 4. The proposed project shall provide for safe and convenient vehicular and pedestrian movement within the site in relation to adjacent ways, and provide for compliance with handicapped access requirements, and provide for access and egress by emergency vehicles;**
- 5. The proposed project shall provide for location and screening of exposed storage areas, machinery, service areas, dumpsters, utility buildings and structures and other unsightly uses to maximize amenity for neighborhood. The Planning Board may require landscaping and/or fencing to provide needed buffers;**
- 6. The proposed plan shall be consistent with the capacity of local infrastructure, such as water supply, utilities, drainage, and Streets, or shall provide for such improvements as necessary; and**
- 7. Consistent with Section 10.6.2, the proposed plan shall provide for compliance with Board of Health, Conservation Commission, and other Town and State Regulations. Where applicable, the approval may be made conditional upon Board of Health, Conservation Commission, Department of Public Works or other approvals, which shall be specifically referenced in the decision.**

10.6.11. Site Plan Review and Abbreviated Hearings and Decisions. The Planning Board shall open a Public Hearing within sixty-five (65) days of the date of an application. The Planning Board shall provide notice as set forth in G.L. c. 40A, §. 11. The Planning Board shall file its written decision with the Town Clerk within ninety (90) days of the closing of the Public Hearing, unless the applicant specifically grants an extension of the review period in writing. Failure to file the decision within ninety (90) days of the closing of the Public Hearing shall constitute approval of the site plan by the Planning Board unless the applicant has granted an extension of the review period.

- 1. When proposed new construction or alteration is subject to both Site Plan Review and a Special Permit, the Planning Board shall conduct both processes simultaneously, using the time limits of the Special Permit process to cover both reviews.**

10.6.12 Final Action. With respect to both Site Plan Review and Abbreviated Site Plan Review, the Planning Board, conducting the Site Plan Review and acting by a majority vote, shall take one (1) of the following final actions as evidenced by a written decision filed with the Town Clerk:

- 1. A written approval of the plan, with a determination that the proposal meets the criteria set forth in this Bylaw; or**
- 2. A written denial of the application stating the reasons for such denial; or**

- 3. A written approval subject to any conditions, modifications, and restrictions as the Planning Board may deem necessary, including phasing of construction and a performance guarantee for any public improvements.**
- 4. The decision shall be filed with the Town Clerk.**

10.6.13 Implementation of Site Plans. Construction under an approved site plan or abbreviated site plan shall begin within two (2) years of the date of the filing of the decision with the Town Clerk, unless extension is granted by the Planning Board. Otherwise, approval shall lapse.

10.6.14 Appeal. The decision of the Planning Board may be appealed to a court of competent jurisdiction as set forth in G.L. c. 40A, §. 17.

Appendix J
FLOOD PLAIN OVERLAY DISTRICT

9.2 FLOOD PLAIN OVERLAY DISTRICT (FPOD).

9.2.1 Purpose. The purpose of the Floodplain Overlay District (FPOD) is:

1. To ensure public safety through reducing the threats to life and personal injury;
2. To eliminate new hazards to emergency response officials;
3. To prevent the occurrence of public emergencies resulting from water quality, contamination, and pollution due to flooding;
4. To avoid the loss of utility services which if damaged by flooding would disrupt or shut down the utility network and impact regions of the community beyond the site of flooding;
5. To eliminate costs associated with the response and cleanup of flooding conditions; and
6. To reduce damage to public and private property resulting from flooding waters.

9.2.2 FPOD Boundaries. ~~The FPOD is herein established as an overlay district. The FPOD includes all Areas of Special Flood Hazard within the Town of Hamilton designated as Zones A and AE on the Essex County Flood Insurance Rate Map (FIRM) issued by the Federal Emergency Management Agency (FEMA) for the administration of the National Flood Insurance Program. The map panels of the Essex County FIRM that are wholly or primarily within the Town of Hamilton are panel numbers 25009C0267F, 25009C0268F, 25009C0269F, 25009C0286F, 25009C0288F, 25009C0289F, 25009C0293F, 25009C0406F, 25009C0407F, 25009C0426F, 25009C0427F, 25009C0429F, 25009C0431F, and 25009C0433F dated July 3, 2012. The exact boundaries of the FPOD may be defined by the 100-year base flood elevations shown on the FIRM and further defined by the Essex County Flood Insurance Study (FIS) report dated July 3, 2012. The FIRM and FIS report are incorporated herein by reference and are on file with the Town Clerk, Board of Selectmen, Planning Board, and Conservation Commission.~~

The FPOD is herein established as an overlay district. The District includes all special flood hazard areas within Hamilton designated as Zone A and AE on the Essex County Flood Insurance Rate Map (FIRM) dated July 8, 2025 issued by the Federal Emergency Management Agency (FEMA) for the administration of the National Flood Insurance Program. The exact boundaries of the District shall be defined by the 1%-chance base flood elevations shown on the FIRM and further defined by the Essex County Flood Insurance Study (FIS) report dated July 8, 2025. The FIRM and FIS report are incorporated herein by reference and are on file with the Hamilton Town Clerk, Conservation Commission, and the Planning and Building Departments.

9.2.3 Base Flood Elevation and Floodway Data.

1. *Floodway Data.* In Zones A and AE of FIRM, along watercourses that have not had a Regulatory Floodway designated, the best available Federal, State, local, or other floodway data shall be used to prohibit encroachments in floodways which would result in any increase in flood levels within the community during the occurrence of the Base Flood discharge.

2. *Base Flood Elevation Data.* Base Flood elevation data is required for subdivision proposals or other developments greater than 50 lots or 5 acres, whichever is the lesser, within unnumbered A zones.

9.2.4 Use Regulations. All Development in the district, including structural and non-structural activities, whether permitted by right or by special permit must be in compliance with the Massachusetts Wetlands Act (G.L. c. 131, s. 40) and with the following:

1. The section of the Massachusetts State Building Code which addresses floodplain and coastal high hazard areas (currently 780 CMR 120.G “Flood Resistant Construction and Construction in Coastal Dunes”);
2. The Wetlands Protection Regulations promulgated by the Massachusetts Department of Environmental Protection (DEP) (currently 310 CMR 10.00);
3. The Inland Wetlands Restriction Regulations promulgated by DEP (currently 310 CMR 13.00);
4. The Minimum Requirements for the Subsurface Disposal of Sanitary Sewage promulgated by the DEP (currently 310 CMR 15, Title 5); and
5. The Hamilton Board of Health Regulations, Chapter 6. Satisfactory evidence shall consist of any permit issued by the Board of Health for the project and/or a written statement from the Board of Health or its agent that no such permit is necessary for the project.

9.2.5 Other Requirements.

1. **The Town of Hamilton requires a permit, including a building permit and/or a Storm Water Management Permit (if applicable) for all proposed construction or other development in the Flood Plain Overlay District, including new construction or changes to existing buildings, placement of manufactured homes, placement of agricultural facilities, fences, sheds, storage facilities or drilling, mining, paving and any other development that might increase flooding or adversely impact flood risks to other properties.**
2. **The applicant is required to obtain all local, state and federal permits that will be necessary in order to carry out the proposed development in the floodplain overlay district. The proponent must acquire all necessary permits, and must demonstrate that all necessary permits have been acquired**
3. Any variances from the provisions and requirements of the above referenced State regulations may only be granted in accordance with the required variance procedures of these State regulations.
4. Within Zones AH and AO of the FIRM, adequate drainage paths must be provided around Structures on slopes to guide floodwaters around and away from proposed Structures.
3. ~~In Zone AE of FIRM, along watercourses within the Town of Hamilton that have a Regulatory Floodway designated on FIRM, encroachments are prohibited in the Regulatory Floodway which would result in any increase in flood levels within the community during the occurrence of the Base Flood discharge.~~

5. In Zones A1-30 and AE, along watercourses that have a regulatory floodway designated on the Town's FIRM or Flood Boundary & Floodway Map, encroachments are prohibited, including fill, new construction, substantial improvements, and other development within the adopted regulatory floodway unless it has been demonstrated through hydrologic and hydraulic analyses performed in accordance with standard engineering practice that the proposed encroachment would not result in any increase in flood levels within the community during the occurrence of the base flood discharge.

4. **6.** All subdivision proposals must be designed to assure that such proposals minimize flood damage; all public utilities and facilities are located and constructed to minimize or eliminate flood damage; and adequate drainage is provided to reduce exposure to flood hazards.

5. **7.** Existing contour intervals of site and elevations of existing structures must be included on the development plan proposal.

6. **8.** There shall be established a "routing procedure" which will circulate or transmit one copy of the development plan to the Conservation Commission, Planning Board, Board of Health, Director of Public Works, and Building Commissioner for comments which will be considered by the appropriate permitting board prior to issuing applicable permits.

9. In A and AE Zones, all recreational vehicles to be placed on a site must be elevated and anchored in accordance with the zone's regulations for foundation and elevation requirements or be on the site for less than 180 consecutive days or be fully licensed and highway ready.

10. In A Zones, in the absence of FEMA BFE data and floodway data, the Building Department will obtain, review and reasonably utilize base flood elevation and floodway data available from a Federal, State, or other source as criteria for requiring new construction, substantial improvements, or other development in Zone A and as the basis for elevating residential structures to or above base flood level, for floodproofing or elevating nonresidential structures to or above base flood level, and for prohibiting encroachments in floodways.

9.2.6 Permitted Uses. The following uses of low flood damage potential and causing no obstructions to flood flows are permitted provided they are permitted in the underlying district and they do not require structures, fill, or storage of materials or equipment:

1. Agricultural uses such as farming, grazing, truck farming, horticulture, etc.;
2. Forestry and nursery uses;
3. Outdoor recreational uses, including fishing, boating, **and** play areas, etc.;
4. Conservation of water, plants, wildlife;
5. Wildlife management areas, foot, bicycle, and/or horse paths;
6. Temporary nonresidential structures used in connection with fishing, growing, harvesting, storage, or sale of crops raised on the premises; and

7. Buildings lawfully existing prior to the adoption of these provisions.

9.2.7. Designation of Community Flood Plain Administrator. The Town hereby designates the position of *Planning Director* to be the Community Flood Plain Administrator.

9.2.87 Notification of Watercourse Alteration. In a riverine situation, ~~the Conservation Commission~~ **the Community Flood Plain Administrator** shall notify the following of any alteration or relocation of a watercourse:

~~Adjacent Communities NFIP State Coordinator
Massachusetts Department of Conservation and Recreation
251 Causeway Street, Suite 600-700
Boston, MA 02114-2104~~

~~NFIP Program Specialist
Federal Emergency Management Agency, Region I
99 High Street, 6th Floor
Boston, MA 02110~~

1. **Adjacent Communities, especially upstream and downstream;**
2. **Bordering States, if affected;**
3. **NFIP State Coordinator, Massachusetts Department of Conservation and Recreation; and**
4. **NFIP Program Specialist Federal Emergency Management Agency, Region I.**

9.2.9 Requirement to submit new technical data. If the Town acquires data that changes the base flood elevation in the FEMA mapped Special Flood Hazard Areas, the Town will, within 6 months, notify FEMA of these changes by submitting the technical or scientific data that supports the change(s.) Notification shall be submitted to:

NFIP State Coordinator Massachusetts, Department of Conservation and Recreation; and
NFIP Program Specialist Federal Emergency Management Agency

9.2.10 Variances to building code floodplain standards. The Town will request from the State Building Code Appeals Board a written and/or audible copy of the portion of the hearing related to the variance, and will maintain this record in the community's files. The Town shall also issue a letter to the property owner regarding potential impacts to the annual premiums for the flood insurance policy covering that property, in writing over the signature of a community official that: (i) The issuance of a variance to construct a structure below the base flood level will result in increased premium rates for flood insurance up to amounts as high as \$25 for \$100 of insurance coverage; and (ii) Such construction below the base flood level increases risks to life and property. Such notification shall be maintained with the record of all variance actions for the referenced development in the floodplain overlay district.

9.2.11. Variances to local Zoning Bylaws related to community compliance with the National Flood Insurance Program (NFIP). A variance from these floodplain bylaws must meet the requirements set out by State law, and may only be granted if:

- 1.) **Good and sufficient cause and exceptional non-financial hardship exist;**

2.) The variance will not result in additional threats to public safety, extraordinary public expense, or fraud or victimization of the public; and

3) The variance is the minimum action necessary to afford relief.

9.2.12. Abrogation and greater restriction section. The floodplain management regulations found in this Floodplain Overlay District section shall take precedence over any less restrictive conflicting local laws, ordinances or codes.

9.2.13. Disclaimer of liability. The degree of flood protection required by this bylaw [ordinance] is considered reasonable but does not imply total flood protection.

9.2.14. Severability. If any section, provision or portion of this bylaw [ordinance] is deemed to be unconstitutional or invalid by a court, the remainder of the ordinance shall be effective.

SECTION 11.0 DEFINITIONS

Floodplain Flood Plain Overlay District: For the purposes of Section 9.2, the following definitions shall apply:

Area of Special Flood Hazard: The land in the floodplain within a community subject to a one percent or greater chance of flooding in any given year. The area may be designated as Zone A, AO, AH, AI- 30, AE, A99, VI-30, VE, or V.

Base Flood: The flood having a one percent chance of being equaled or exceeded in any given year.

Coastal High Hazard Area: An area of special flood hazard extending from offshore to the inland limit of a primary frontal dune along an open coast and any other area subject to high velocity wave action from storms or seismic sources. The area is designated on a FIRM as Zone V, V I-30, or VE.

Development: Any manmade change to improved or unimproved real estate, including but not limited to building or other structures, mining, dredging, filling, grading, paving, excavation or drilling operations.

District: The Floodplain Protection Overlay District.

Federal Emergency Management Agency (FEMA): The agency that administers the national Flood Insurance Program. FEMA provides a nationwide flood hazard area mapping study program for communities as well as regulatory standards for development in the flood hazard areas.

Flood Insurance Rate Map (FIRM): An official map of a community on which FEMA has delineated both areas of special flood hazard and the risk premium zones applicable to the community.

Flood Insurance Study: An examination, evaluation, and determination of flood hazards, and, if appropriate, corresponding water surface elevations, or an examination, evaluation and determination of flood-related erosion hazards.

Floodway: The channel of a river or other watercourse and the adjacent land areas that must be reserved in order to discharge the base flood without cumulatively increasing the water surface elevation.

Functionally Dependent Use: A use which cannot perform its intended purpose unless it is located or carried out in close proximity to water. The term includes only docking facilities, port facilities that are necessary for the loading and unloading of cargo or passengers, and ship building and ship repair facilities, but does not include long-term storage or related manufacturing facilities. [US Code of Federal Regulations, Title 44, Part 59] Also [Referenced Standard ASCE 24-14]

Highest Adjacent Grade: The highest natural elevation of the ground surface prior to construction next to the proposed walls of a structure. [US Code of Federal Regulations, Title 44, Part 59]

Historic Structure: Any structure that is:

- (a.) Listed individually in the National Register of Historic Places (a listing maintained by the Department of Interior) or preliminarily determined by the Secretary of the Interior as meeting the requirements for individual listing on the National Register;**
- (b.) Certified or preliminarily determined by the Secretary of the Interior as contributing to the historical significance of a registered historic district or a district preliminarily determined by the Secretary to qualify as a registered historic district;**
- (c.) Individually listed on a state inventory of historic places in states with historic preservation programs which have been approved by the Secretary of the Interior; or**
- (d.) Individually listed on a local inventory of historic places in communities with historic preservation programs that have been certified either: (1) By an approved state program as determined by the Secretary of the Interior or (2) Directly by the Secretary of the Interior in states without approved programs. [US Code of Federal Regulations, Title 44, Part 59]**

Lowest Floor: The lowest floor of the lowest enclosed area (including basement or cellar). An unfinished or flood resistant enclosure, usable solely for parking vehicles, building access or storage in an area other than a basement area is not considered a building's lowest floor, provided that such enclosure is not built so as to render the structure in violation of the applicable non-elevation design requirements of NFIP Regulations 60.3.

Manufactured Home: A structure, transportable in one or more sections, which is built on a permanent chassis and is designed for use with or without a permanent foundation when connected to the required utilities. For floodplain management purposes the term "manufactured home" also includes park trailers, travel trailers, and other similar vehicles placed on a site for greater than 180 consecutive days. For insurance purposes, the term "manufactured home" does not include park trailers, travel trailers, and other similar vehicles.

Manufactured Home Park or Subdivision: A parcel (or contiguous parcels) of land divided into two or more manufactured home lots for rent or sale.

New Construction: For floodplain management purposes, structures for which the "start of construction" commenced on or after the effective date of a floodplain management regulation adopted by a community. For the purpose of determining insurance rates, new construction means structures for which the "start of construction" commenced on or after the effective date of an initial FIRM or after December 31, 1974, whichever is later.

Structures for which the start of construction commenced on or after the effective date of the first floodplain management code, regulation, ordinance, or standard adopted by the authority having jurisdiction, including any subsequent improvements to such structures. New construction includes work determined to be substantial improvement. [Referenced Standard ASCE 24-14]

One Hundred Year Flood: See Base Flood.

Recreational Vehicle: A vehicle which is:

(a) Built on a single chassis;

(b) 400 square feet or less when measured at the largest horizontal projection;

(c) Designed to be self-propelled or permanently towable by a light duty truck; and

(d) Designed primarily not for use as a permanent dwelling but as temporary living quarters for recreational, camping, travel, or seasonal use. [US Code of Federal Regulations, Title 44, Part 59]

Regulatory Floodway: See Floodway.

Special Flood Hazard Area: An area having special flood and/or flood-related erosion hazards, and shown on an FHBM or FIRM as Zone A, AO, AI -30, AE, A99, AH, V, V I-30, VE.

Start of Construction: The date of issuance for new construction and substantial improvements to existing structures, provided the actual start of construction, repair, reconstruction, rehabilitation, addition, placement or other improvement is within 180 days after the date of issuance. The actual start of construction means the first placement of permanent construction of a building (including a manufactured home) on a site, such as the pouring of a slab or footings, installation of pilings or construction of columns. Permanent construction does not include land preparation (such as clearing, excavation, grading or filling), the installation of streets or walkways, excavation for a basement, footings, piers or foundations, the erection of temporary forms or the installation of accessory buildings such as garages or sheds not occupied as dwelling units or not part of the main building. For a substantial improvement, the actual "start of construction" means the first alteration of any wall, ceiling, floor or other structural 12 part of a building, whether or not that alteration affects the external dimensions of the building. [Base Code, Chapter 2, Section 202]

Structure: For floodplain management purposes, a walled and roofed building including a gas or liquid storage tank, that is principally above ground, as well as a manufactured home.

Structure: For insurance coverage purposes, means a walled and roofed building, other than a gas or liquid storage tank, that is principally above ground and affixed to a permanent site, as well as a manufactured home on foundation. For the latter purpose, the term includes a building while in the course of construction, alteration, or repair, but does not include building materials or supplies intended for use in such construction, alteration, or repair, unless such materials or supplies are within an enclosed building on the premises.

Substantial Damage: Damage of any origin sustained by a structure whereby the cost of restoring the structure to its before-damaged condition would equal or exceed 50 percent of the market value of the structure before the damage occurred.

Substantial Improvement: Any repair, reconstruction, or improvement of a structure, the cost of which equals or exceeds 50 percent of the market value of the structure either (a) before the improvement or repair is started, or (b) if the structure has been damaged and is being restored, before the damage occurred. For the purposes of this definition, "substantial improvement" is considered to occur when the first alteration of any wall, ceiling, floor, or other structural part of the building commences, whether or not that alteration affects the external dimensions of the structure.

Substantial Repair of a Foundation: When work to repair or replace a foundation results in the repair or replacement of a portion of the foundation with a perimeter along the base of the foundation that equals or exceeds 50% of the perimeter of the base of the foundation measured in linear feet, or repair or replacement of 50% of the piles, columns or piers of a pile, column or pier supported foundation, the building official shall determine it to be substantial repair of a foundation. Applications determined by the building official to constitute substantial repair of a foundation shall require all existing portions of the entire building or structure to meet the requirements of 780 CMR. [As amended by MA in 9th Edition BC]

Variance: A grant of relief by a community from the terms of a flood plain management regulation. [US Code of Federal Regulations, Title 44, Part 59].

Violation: The failure of a structure or other development to be fully compliant with the community's flood plain management regulations. A structure or other development without the elevation certificate, other certifications, or other evidence of compliance required in §60.3 is presumed to be in violation until such time as that documentation is provided. [US Code of Federal Regulations, Title 44, Part 59]

Zone A: The 100-year floodplain area where the base flood elevation (BFE) has not been determined. To determine the BFE, use the best available federal, state, local, or other data.

Zone AI-30 and Zone AE (for new and revised maps): The 100-year floodplain where the base flood elevation has been determined.

Zone AH and Zone AO: The 100-year floodplain with flood depths of 1 to 3 feet where a clearly defined channel does not exist, where the path of flooding is unpredictable, and where velocity flow may be evident. Such flooding is characterized by ponding or sheet flow.

Zone A99: Areas to be protected from the 100-year flood by federal flood protection system under construction. Base flood elevations have not been determined.

Zones B, C and X: Areas identified in the community Flood Insurance Study as areas of moderate or minimal flood hazard. Zone X replaces Zones B and C on new and revised maps.

Zone V: A special flood hazard area along a coast subject to inundation by the 100-year flood with the additional hazards associated with storm waves. Base flood elevations have not been determined.

Zone VI-30 and Zone VE (for new and revised maps): A special flood hazard area along a coast subject to inundation by the 100-year flood with additional hazards due to velocity (wave action). Base flood elevations have been determined.

April 5, 2025

From: Hamilton Finance and Advisory Committee

Commentary and Recommendations on the Warrant for:

ANNUAL TOWN MEETING

Saturday April 5, 2025

Hamilton-Wenham Regional High School, Hamilton

To the Citizens of Hamilton:

Before each Annual Town Meeting and Special Town Meeting, the Finance and Advisory Committee (FINCOM) is asked to provide our recommendations and analysis regarding the warrant articles to be presented at Town Meeting for your deliberation and disposition. FINCOM's responsibility is to recommend the action we consider appropriate as to "any or all municipal questions." As citizens, you are entitled to consider and vote on all such questions presented to you on the town meeting warrant.

As Hamilton residents, we are fortunate to have retained the most direct and democratic form of governance--the town meeting. But that means that only those who attend will ultimately make these decisions. Too often, a small minority of citizens make decisions at town meeting that will affect all citizens. FINCOM encourages you to participate in the decision-making process by attending Town Meeting and voting on these important matters.

Please read this document in conjunction with the Warrant and the appropriate Appendices. Please refer to those documents for the wording of the articles, summaries, and fiscal impact as prepared by the Select Board (SB), Town Manager, Finance Director, and Town Counsel.

These items should not be viewed or decided on in a vacuum but must be considered in context with each other; what the funding sources will be as well as the cumulative effect on the tax rate. FINCOM will provide insight into the projected tax impact of these proposed projects during the Town meeting as well as posting the same information to the FINCOM website.

ARTICLES 2025/4 1-1 and 1-2

These articles are self-explanatory and do not require additional comment.

ARTICLES 2025/4 1-3 Article for Consent Motion

Certain of the articles described below and as listed in the Warrant will be consolidated into a single motion for approval. These articles include administrative and house-keeping matters, and similar issues that the SELECT BOARD (SB) considers to be uncontroversial. Consolidating those articles is efficient and streamlines the Town Meeting process. Any citizen may ask that any article be removed from the Consent Agenda and be discussed separately.

Expected Consent Motion to include articles: ARTICLES 2-1, 2-5, 2-6, 2-7, 2-8, 2-10, 3-1, 3-3 and 3-4

Article 2025/4 2-1 Compensation/Classification Table

Article 2-1 proposes amendments to the Town's Personnel By-Law by adopting changes to the Classification and Compensation Table as set forth in Appendix A to the Warrant. The changes are being made to reflect the costs of the collective bargaining agreements and living increases for settled contracts and non-union employees. In addition to modified pay rates, the following changes are proposed:

1. Annual Cost of Living (COLA) increases for all positions is 3.5%.
2. The Town negotiated contracts with all 5 unions last spring. These are 3-year contracts through 6/30/2027.
3. The Police Union has the greatest impact on the overall compensation budget, given their budget is the largest.
4. Call Firefighters also increased to stay competitive in the market and secure those positions.
5. Employees currently on the step grid will receive a COLA increase on 7/1 and a step increase on 1/1.

Continued increases in personnel spending by the Town will apply pressure on the Town's budget, including the potential for the need for a Proposition 2 ½ override. Nevertheless, the current changes are well supported and FINCOM advises that this Article be approved.

The Finance and Advisory Committee recommends FAVORABLE (4-0) on Article 2-1.

ARTICLE 2025/4 2-2 Prior Year Bills

Each year-end, Town Management lets vendors know that bills must be submitted for payment. Occasionally vendors overlook the request or assume their bill is in process. When an invoice is too late to be paid in the current year’s budget, a special request must be made at Town Meeting to fund the invoice.

As of March 24, 2025, there are 12 prior year bills totaling \$15,132.73 to be presented at Town Meeting for consideration. These bills will be funded through Free Cash with no impact to the tax rate.

| Vendor | Department | Purpose | Amount |
|-------------------------------|-------------------|---|--------------------|
| Casella Waste | DPW | Mattress Disposal | \$1,550.00 |
| Casella Waste | DPW | Mattress Disposal | \$2,210.00 |
| Law Office of Jonathan Witten | Town Manager | Zoning/Planning Legal Services | \$3,355.00 |
| Meridia | Select Board | Annual Town Meeting 2024 | \$4,500.00 |
| National Grid | DPW | Electricity for new Inspection Building | \$457.84 |
| National Grid | DPW | Electricity for new Inspection Building | \$432.52 |
| National Grid | DPW | Electricity for new Inspection Building | \$346.53 |
| National Grid | DPW | Electricity for new Inspection Building | \$261.08 |
| National Grid | DPW | Electricity for new Inspection Building | \$109.04 |
| National Grid | DPW | Electricity for new Inspection Building | \$94.95 |
| Robert E. Puff | Planning | Bridge Street Drainage Engineering Services | \$1,725.00 |
| Russell Camp | Chebacco Woods | Dog Bag Box-Build, paint, laminate sign | \$90.77 |
| Total Prior Year Bills | | | \$15,132.73 |

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-2.

ARTICLE 2025/4 2-3 General Town Departmental Appropriations

Article 2-3 is the annual budget appropriation for the town government and schools, including the Hamilton-Wenham Regional School District (HWRSD) and Essex North Shore Agricultural and Technical School. Please refer to **Appendices B** and **C** of the Warrant for detailed figures.

The proposed FY26 budget includes increases for both the Town and HWRSD compared to FY25 while maintaining current service levels. Total spending proposed for FY26 is \$42,915,592, representing a 1.07% increase over FY25. See **Appendix B** for detailed comparisons.

Article 2-3 seeks to appropriate \$41,714,765, representing a 3.7% increase over the prior year's main budget appropriation. Certain amounts included in the overall FY26 budget are separately appropriated under other Warrant Articles as follows:

| Article | Purpose | Amount |
|----------------|-------------------------------------|--------------------|
| 2-4 | Capital Expenditures | \$762,125 |
| 2-7 | Hamilton Development Corp. Transfer | \$78,702 |
| 2-8 | OPEB Trust Fund Transfer | \$125,000 |
| 2-9 | Capital Stabilization Fund Transfer | \$235,000 |
| | | |
| | TOTAL | \$1,200,827 |

These appropriations come from Free Cash, American Rescue Plan Act funds, Meals Tax transfers, or are one-time expenses, thus not indicative of ongoing operational spending and not impacting the tax rate.

For the Town side, the total FY26 operating and personnel expenses are \$15,206,732, an increase of \$497,740 (3.4%) over FY25. This increase is primarily due to personnel expenses rising by \$481,819 (4.9%), driven mainly by renegotiated public safety labor contracts and proactive increases in call firefighter pay rates to aid retention. Additionally, the increase includes higher retirement and insurance costs. Operating expenses total \$4,885,484, a \$15,920 (0.3%) increase over FY25.

Personnel expenses represent 64.6% of the Town's operating budget, up from 60.2% last year, totaling \$10,321,248. Excluding retirement and insurance, departmental personnel costs are \$7,108,731, a 0.6% increase over FY25, underscoring the significant impact of rising retirement and insurance costs (\$439,885, or 15.9% YoY).

On the School District side, Hamilton's FY26 HWRSD assessment is \$25,669,983, a 3.94% increase over FY25. Hamilton's share of the assessment decreased slightly from 66.29% to 65.92%. The primary factor driving the increase is recent teacher labor contract settlements. The operational budget rose by 4.52%, though this increase was moderated by

using past-year surplus funds (Excess & Deficiency) to reduce the current assessment, a practice that may not be sustainable.

The Essex North Shore Agricultural and Technical School FY26 assessment and debt service total \$424,070 and \$59,531, respectively, increasing by \$57,242 (13.4%) over FY25.

| School spending detail: | <u>FY25</u> | <u>FY26</u> | <u>Increase</u> | <u>% Change</u> |
|--|---------------------|---------------------|------------------|---------------------|
| HW Regional Schools (HWRSD) | \$23,375,176 | \$24,456,892 | \$1,081,716 | 4.6% |
| HWRSD Debt Service | \$1,438,690 | \$1,213,091 | -\$225,599 | -15.7% |
| Essex North Shore Agricultural and Technical School (ENSATS) | \$402,150 | \$424,070 | \$21,920 | 5.5% |
| ENSATS Debt Service | \$24,209 | \$59,531 | 35,322 | 145.9% |
| TOTAL | \$25,240,225 | \$26,153,584 | \$913,359 | 3.6% |

The increase in HWRSD operational spending primarily reflects an increase in Full-Time Equivalents (FTEs) from 294.52 in FY25 to 295.40 in FY26. Additions include 2.1 STEM teachers and 1 Special Education ESP, offset by a 1.83 FTE reduction in Literacy ESPs. Despite a modest increase of 0.86 FTEs in teacher staffing, total spending rose by \$1,689,741. Teacher expenses per FTE increased by 9.3% (from \$94,490 to \$103,309), partly inflated due to retroactive adjustments from the labor agreement. Future increases under 3.0% annually may be difficult without substantial operational changes.

The FY26 budget uses \$2,088,123 in Excess & Deficiency funds to offset school district expenses and assessments. While current increases are reasonable, ongoing increases at higher rates may exceed town fiscal capacity.

Town revenues primarily (approximately 85%) come from property tax levies. Proposition 2½ limits annual tax levy increases to 2.5% plus new growth, with additional spending requiring voter approval (override). The town previously had excess levy capacity of over \$2.9 million (FY18), but this excess capacity is fully exhausted as of FY26. Moving forward, personnel costs alone are expected to rise by at least 3.0% annually. With no remaining levy capacity, future cost increases above 2.5% will require additional revenue, overrides, and/or spending cuts.

The Finance and Advisory Committee utilizes multiple monitoring and forecasting models and is anticipating significant challenges for FY27 and beyond with an override likely becoming necessary in the future. Therefore, continued financial discipline and efficient spending practices remain essential.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-3.

ARTICLE 2025/4 2-4 Capital Expenditures

Article 2-4 is the annual appropriation for capital expenditures for the Town. The FY2026 request of \$852,125 is discussed below and appears on Exhibit D. This list is the result of requests from department heads which are discussed with the Town's Capital Committee (CAPCOM) and are approved after deliberations among the CAPCOM, FINCOM and SB.

A brief discussion of each item appears below:

1) Highway – Highway - Roads and Sidewalk Improvements (\$350,000)

Rationale/Purpose of Spend: Although Ch. 90 provides a limited amount of funds for sidewalk and road repair, in FY2026 the CAPCOM has recommended continuing to fund additional road and sidewalk projects that will exceed the Ch. 90 budget.

2) Facilities/Buildings - COA Building Improvements (\$61,000)

Rationale/Purpose of Spend: Building maintenance program which will address exterior repairs for dormers, gutters, wood trim, and paint.

3) Facilities/Buildings - Public Safety Building Improvements (\$20,000)

Rationale/Purpose of Spend: While a roof replacement will be required in the future, FY2026 costs will be limited to roof repairs.

4) Facilities/Buildings - Patton Park Restrooms (\$30,000)

Rationale/Purpose of Spend: Upgrading the restrooms at Patton Park will be a welcome improvement appreciated by thousands of visitors each year.

5) Library - Replace 2nd HVAC Condenser (\$163,125)

Rationale/Purpose of Spend:—CAPCOM recommends bringing this 2nd HVAC unit replacement on-line to optimize the energy efficiency for the building complex.

6) Police – SUV Cruiser (\$71,000)

Rationale/Purpose of Spend: The replacement SUV is part of the Town's gradual fleet replacement so that older vehicles with a lot of mileage get replaced on a regular basis. Generally, the plan calls for the purchase of a new fleet vehicle every year, with the occasional purchase of 2 vehicles.

7) Police - Replace Portable Radios (\$67,000)

Rationale/Purpose of Spend: The project will facilitate the move of all Hamilton public safety staff to a single system for communications.

8) Water Department Pickup Truck (\$90,000) (Funded from Water Retained Earnings)

Rationale/Purpose of Spend: The vehicle is a replacement for the Water Operation Supervisor truck. It is used for a variety of purposes such as for water department chemical transport, emergency response and monthly water testing.

FINCOM recommends that the Town approve spending on these items as there is a clear need for each and they are an appropriate expenditure of Town funds. The Capital Appropriation of \$852,125 contained in this article is lower than the request at last year’s Annual Town Meeting (\$1,360,788).

Free Cash Overview

By way of a reminder, at the Special Town Meeting in September 2024, the town approved usage of \$500,000 from Free Cash for renovation of the Town Hall.

The town ended FY2024 with \$4,512,906 in Free Cash. The chart below provides a recap/projection of free cash since the end of FY2024:

| <u>Article</u> | <u>Description</u> | <u>Amount</u> |
|---------------------------------------|---|----------------------|
| | Free Cash Balance at FY2024 Year-End (June 2024) | \$4,512,906 |
| Special Town Meeting - September 2024 | | |
| 2-2 | Town Hall Project | (\$500,000) |
| | Free Cash Balance Prior to 2025 Annual Town Meeting | \$4,012,906 |
| Annual Town Meeting – April 2025 | | |
| 2-4 | Capital Expenditures | (\$ 762,125) |
| 2-8 | OPEB Trust Fund Transfer | (\$ 125,000) |
| 2-10 | Capital Stabilization Fund Transfer | (\$ 235,000) |
| | Fire Dept Capital Lease Purchases | (\$ 111,712) |
| | Pension Trust Transfer | (\$ 550,000) |
| | One-Time Retirement Payouts | (\$ 37,829) |
| 2-2 | Prior Year Bills | (\$ 15,132) |

| | | |
|--|--|---------------|
| | One-Time General Code Software – Town Clerk | (\$ 15,000) |
| | Sub-Total ATM 2025 | (\$1,851,798) |
| | | |
| | Free Cash Balance after STM 2024 & ATM 2025 | \$2,161,108 |
| | Estimated Reserve of 5% of Operating Budget | \$2,019,231 |
| | Current Excess over Desired Reserve | \$141,877 |

Generally, FINCOM does not recommend using free cash to fund expenses if those expenses are recurring and otherwise operational in nature. Eventually this practice would deplete the Town’s free cash, vitally needed in uncertain times, and mask the true operational expenses of the Town. So long as enough free cash is or will be generated from the prior and/or current year’s budget and the expenditures are one time in nature, we believe it to be prudent to use free cash for capital expenditures as opposed to depleting stabilization funds or appropriating and further negatively impacting the tax rate.

These capital expenditures will not impact the tax rate.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-4.

ARTICLE 2025/4 2-5 Water Enterprise Budget

The Water Enterprise Budget is solely supported by the Water Enterprise Fund, which is funded by individual water bills. The SB generally reviews rates annually and in fact increased water rates in 2023. There are two ways to increase rates: through usage rates and through the flat rate infrastructure charge. As the name implies, the flat rate infrastructure charge is intended to match the amount spent on capital related to the water infrastructure that all water consumers benefit from. The increases are intended to cover operating and debt service costs and to maintain reserves. Our financial policy with regards to the enterprise funds, requires the Town to “maintain a minimum reserve amount of 20%”.

The Long-Term Capital Improvement plan of the town currently contains over \$8.9 Million of “water” capital improvements in the FY2026 - FY2029 time frame. Due to ongoing capital improvement projects the Water Enterprise Fund will be paying off debt of \$955,872.50 in FY2026. The Water Enterprise Fund has budgeted for \$2,514,566 in FY2026. The overall budget has increased by 8.4% over FY2025, largely due to debt services being paid in FY2026.

The FINCOM finds this FY2026 budget to be controlled and reasonable. And although there is no tax impact on the town, the town residents should anticipate that there may be another water rate increase in the future.

Short-Term the goal of the Town is to build up retained earnings to fund a large system

improvement project locally without the need to borrow. The project is aimed at upgrading and replacing existing infrastructure. Estimated costs are between \$1.0 to \$2.0 Million based on past large system improvement projects. The Town has applied for a grant to cover construction, administration, and related costs. Prior design of this project was funded through earlier grants.

Water supply and quality are growing issues across the Town and North Shore. To address these issues, the Town is exploring multiple options. The Town is under design for a new interconnection with Wenham and Salem-Beverly Water Supply Board (SBWSB). This would allow the Town to supplement additional water supply during emergencies and high-demand periods. Final design and construction are anticipated to be fully funded through a MassDEP WMA grant. Warrant Article 2025/4 3-4 is the catalyst to this project, with the easement providing the Town with the only viable location for a new interconnection.

Additionally, the Town is in conversation with Senator Bruce Tarr's Water Task Force, created to address the issues of water supply and quality across the North Shore. Options being discussed but not limited to; fully connecting the Town and surrounding communities to SBWSB, a connection with Massachusetts Water Resources Authority, or possible local infrastructure projects across the North Shore. These projects are still being evaluated for feasibility and several years away from realization.

The FINCOM continues to partner with Town Management to review upcoming local capital projects and the necessary funding required to support those projects. In addition, FINCOM is closely monitoring the issue of water supply and larger system impact projects across the North Shore.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-5.

ARTICLE 2025/4 2-6 Annual Financial Actions

Article 2-6 is an annual "house-keeping" exercise where the town transfers funds to the General Fund from two funds and, with respect to the Clark Property Fund, between funds:

- A. \$2,000 is transferred from the Cemetery Sale of Lots and Graves Fund to the General Fund as an off-set to help repay the cemetery expenditures that come from the General Fund.
- B. \$519,659 is to be transferred from the Water Enterprise Fund to the General Fund to offset the indirect costs that are incurred on behalf of the Water Department. These indirect costs would include, for example, the time spent by Town employees when bills are paid for the Water Department, or collecting water

payments, or any administrative or other work performed by non-water department employees, debt cost, health insurance, etc. The Massachusetts DOR recommends that these indirect costs be accounted for to know the full costs of providing water service to the Town. The Town is reimbursed for these indirect costs and with this information on indirect costs, the town can recover costs by relying on user fees, and to maintain revenue/retained earnings to use for debt service, operating and capital expenses.

- C. \$9,213 is to be transferred as an annual transfer of funds derived from the interest that has accumulated in the Clark Property Fund. The interest is transferred to the Conservation Fund annually.

As these transfers are between funds or effectively reimburse the Town's General Fund, the net effect of these transfers is to reduce the tax rate for citizens of Hamilton.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-6.

ARTICLE 2025/4 2-7 Hamilton Development Corporation

The Hamilton Development Corporation (HDC) is a publicly chartered organization whose charge is to initiate, foster and support economic development in the Town's commercial District using public and private funding. Pursuant to Town Meeting vote, the HDC receives annual funding by application of meals tax revenue. Article 2-7 proposes to transfer \$78,702 from the General Fund which is the amount that the Town collected from Meal's Tax in FY2024, the most recently completed fiscal year. There is a time lag between the receipt of meals tax by the Town and the related funding of the HDC as part of the annual budget process.

Prior to this year the funding of the HDC had been largely equivalent to the Meal's Tax collected but it was not always funded at the full amount collected. Recently, the Select Board adopted a financial policy, fully endorsed by FINCOM, that as part of the annual budget process, the HDC should receive 100% of the Meal's Tax collected by the Town during the prior fiscal year. This formulaic approach allows the HDC funding amount to be based on actual collections, as was the intent when the Meal's Tax was adopted by the Town. It also provides the HDC with a more certain amount for planning purposes after the close of the prior fiscal year.

As related in the HDC 2022 ANNUAL REPORT, "the enabling legislation gave the HDC specific authority to purchase, own, operate, lease property and expend funds within the commercial District for the economic vitality of the District." Accordingly, the HDC is empowered to "(m)aximize economic benefit to the town, which cannot be fully realized by the ordinary operations of private enterprise; (l)everage private investments and sources of public revenue; to retain existing enterprises, and attract new commercial, industrial or residential development; (r)edvelop rehabilitate, or rebuild unused, underused and undeveloped areas for commercial, industrial, residential, institutional and

public facility purposes for which public funds may be expended for the good and welfare of the town and the commonwealth.”

In prior FINCOM commentary, we acknowledged the HDC-Willow Street project’s contribution to tax base and affordable housing. In 2023, the HDC submitted a comprehensive application for a \$5M grant for streetscape improvements in the downtown area to improve traffic patterns and make it more pedestrian and bicycle-friendly. Although the comprehensive grant was denied in late 2023 due to its size, the planning process was important and may still be gradually implemented while additional grants and funding opportunities are sought. These improvements may be implemented separately or as part of potential future downtown developments related to the 3A zoning regulations, the Winthrop School site, etc. In the past year, the focus of the HDC has been on 1) development of a pocket park at Bay Road and Railroad Ave. to make the area more attractive for downtown shoppers, 2) supporting the Town’s efforts with respect to the development of form-based codes for the downtown and 3) supporting the Town’s efforts for improvement of Wi-Fi and cellular service in the downtown area.

Given Hamilton’s overwhelming reliance upon proceeds from the real estate tax to fund its fiscal needs, including its 60% plus share of the School District costs, and the certainty that such fiscal obligations will increase, with consequential increases to the property tax burden on citizens, there is an ongoing need to maximize and expand the Town’s downtown commercial base and tax revenue and these needs and objectives are squarely within the HDC’s statutorily prescribed wheelhouse.

There is no real effect on the tax rate since this budgetary allocation is funded by the Meals Tax. While not funding the transfer to the HDC would theoretically save tax dollars, this would run counter to the intent of enacting the Meals Tax.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-7.

ARTICLE 2025/4 2-8 OPEB Trust Fund

Beginning with the 2010 Annual Town Meeting, the FINCOM has recommended, and the Town Meetings have concurred, making annual contributions toward funding by accrual the Town’s “Other Post-Employment Benefits” (OPEB) obligations. The most recent actuarial study estimated the unfunded liability to be approximately \$5.7 million. As a result of these annual contributions, the Town has already set aside approximately \$1,473,406 for this long-term liability. The \$125,000 sum requested by this Article reflects a continuing annual appropriation as calculated by periodic actuarial review.

As related by the Town’s actuary, Odyssey Advisors, in its description of the accounting standard applicable to Town’s OPEB Plan: “The philosophy behind the accounting standard is that these post-employment benefits are part of the compensation earned by

employees in return for their services, and the cost of these benefits should be recognized while employees are providing those services, rather than after they have retired. This philosophy has already been applied for years to defined benefit pensions; and (the accounting standards) extend this practice to all other post-employment benefits” (p.8).

That same Plan description further relates that the annual required contribution of the Town “represents a level of funding that, if paid on an ongoing basis, is projected to cover normal cost (of OPEB obligations) each year and amortize any unfunded actuarial liabilities (or funding excess) over a period not to exceed 30 years” (p.25). There will be periodic actuarial assessments of the status of the Town’s OPEB Plan, but we believe that the recommended \$125,000 contribution made pursuant to the 30-year amortization schedule may gradually increase to reflect future medical trends and costs.

Currently, retired employees choosing to participate in the benefit plan pay 45% of health insurance premium cost, 100% of dental coverage, and 25% of life insurance cost. Currently the Town’s portion of these costs gets appropriated. It is anticipated that as the Trust Fund grows in value, eventually the Fund will be sufficient to satisfy current and future obligations.

It is anticipated that this contribution will come from the Town’s free cash, which means the adoption of this Article will not affect the tax rate.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-8.

ARTICLE 2025/4 2-9 Capital Stabilization Fund

This Article moves funds from existing Free Cash to the Capital Stabilization Fund in accordance with the Stabilization Fund policy. As previously established, this fund requires a two-thirds (2/3) majority vote to move funds into, and a two-thirds (2/3) majority of Town Meeting voters to move funds out of the fund. Therefore, this money is protected from being used for anything other than a use favored by a two-thirds (2/3) majority of Town Meeting voters.

The Town’s financial policy with respect to financial reserves set a target amount for the Town’s capital stabilization reserve fund to be equal to the total annual asset depreciation of the Town, which this year is approximately \$1.7 million. After approximately \$645,000 from the Capital Stabilization Fund was used last year to purchase a Fire Truck for the Town, the Town is currently under that target by \$523,791. The request is to transfer \$235,000 to the Capital Stabilization Fund (the same amount transferred in FY25) as part of a three-year plan to replenish the Capital Stabilization Fund after that large purchase. This request is in line with reaching the target established by the Town’s financial policies and will move the Town to a better financial position to absorb future capital needs

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-9.

ARTICLE 2025/4 2-10 - Community Preservation Budget

The Community Preservation Budget is funded from a 2% surcharge onto the property tax plus State matching funds. This is noted as a separate line item on your tax bill.

The CPC is charged with providing support to various town projects: historical, open space and community housing. For each fiscal year, the community must spend or reserve at least 10% of the annual revenues in the fund for each of the act’s community preservation purposes: community housing, historic preservation, and open space. Annual administrative and operating expense appropriations may not exceed 5% of the year’s estimated annual revenues. This article addresses the following line-items contained in Appendix F to the warrant:

| # | Description | Amount |
|---|---|------------------|
| 1 | <u>Administration Expense</u> Appropriate from the FY25 Community Preservation Fund Revenues for administration costs including, but not limited to, annual Community Preservation Coalition membership fees, signs publicizing CPA projects and salary for part-time Community Preservation Coordinator. | \$30,295 |
| 2 | <u>Open Space and Recreation - Project</u> Appropriate from the Community Preservation Fund Balance to fund the debt service for the Sagamore Hill conservation project. This bond will be paid in full in FY2032. | \$102,100 |
| 3 | <u>Transfers</u> Transfer from the Community Preservation Unreserved Fund Balance to the Community Housing Reserve | \$70,000 |
| 4 | <u>Historic Preservation – Town Hall Project</u> To appropriate \$340,650 from the Community Preservation Unreserved Fund Balance to fund the debt service for the Town Hall Renovation Project. This bond will be paid in full in FY2043. | \$340,650 |
| | Total FY’26 Use of Funds | \$543,045 |

The CPC budget is limited by the surcharge and State match. Given the amount of CPC spending in prior years, FINCOM encourages the continued accumulation of reserves for future larger projects.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 2-10.

ARTICLE 2025/4 2-11 – HWRSD Consolidated Elementary School

FINCOM Supports the Consolidated School Building Proposal

FINCOM supports Article 2-11 which requires Hamilton to take responsibility for: **\$61 Million of the \$142 Million school project cost.**

The chart below is the proposal being advanced in Article 2-11.

| Entity | Project Cost | | Debt Service | | |
|----------|--------------|------|------------------------------|---------------|---------------------|
| | \$M | % | \$M 20-Years | \$M Annual | Year 1 / Year 20 |
| State | \$ 49 | 36% | Funded from State Income Tax | | |
| Wenham | \$ 31 | 22% | \$46 | \$2.3 | \$3.0 - \$1.6 |
| Hamilton | \$ 61 | 42% | \$89 | \$4.4 | \$5.8 - \$3.2 |
| Total | \$ 142 | 100% | \$135 | | |

Overview

The key drivers for this support are:

- **Consolidating two schools removes two old buildings from the capital repair/improvement pipeline.** Simply stated, FINCOM does not believe investing ten-of-millions of funding into two 60/70-year-old school buildings is a strong investment proposal. Consolidation would allow the District to redirect focus and funding onto other schools in the District. (The near-term capital contained in the FY '25 budget targeting these two schools was \$9.4Million and would be largely avoided while considering risk, safety, comfort and functionality.)
- **The immediate availability (2028) of the \$49M MSBA reimbursement award.** This is a “once-in-a-great while opportunity.” A delay in utilizing these funds, of even just three years, could impose a loss of value to the school District of \$6 M+ (By way of reminder, the reimbursement from the MSBA includes \$1.6 Million for “best practices” in building maintenance.)
- **As far back as 2014, a consolidated school was being discussed by both towns and the District.** The 2014 Hamilton-Wenham Regional School District (District) Master Plan contains a recommendation for a consolidated school *“if the district were interested in the most cost-effective construction project, a single school (population 728 students) is the least expensive”* option out of a

range of options. (Please take the time to review this document which is on the Elementary School project page.)

- **Alternative proposals to the proposed school project (two new schools, renovation, delay, etc.) will simply cost the School District more in the long-run.** The most vivid example of this is a scenario to build two new schools, the 2nd school built 10 years after the 1st school. In this scenario, both schools would follow the design which aligns with the Educational Plan adopted by the District. The difference would be \$86 Million in project cost which would translate into an estimated \$73 Million of additional tax burden for Hamilton taxpayers.
- **School construction costs** have increased dramatically (30 – 50%) since 2020. It is expected this upward trajectory will continue. **Industry forecasts predict a 5-7% increase in overall construction costs in 2025.** These impacts are arising from lack of labor availability, potential tariffs, supply chain issues, commodity and material cost increases and overall market inflation. Any school construction project will continue to be battered by this cost pressure.
- **The Unit costs per student** of this consolidated school project compare very favorably against recent MSBA approved projects and other project scenarios considered by the HWRSD. This means that because of economies of scale and a thoughtful design, the cost of the consolidated project is materially more attractive than alternatives.
 - **Net Project Cost per student is \$ 136 thousand**
 - **Square Footage per student is 172 Sq. ft.**

One Member of FINCOM Offered a Dissenting Point-of-View

While I agree that our town needs to address the condition of our school buildings, and I acknowledge that from a financial standpoint consolidation appears most economical, I cannot support the proposal to consolidate our three elementary schools into one.

Research consistently demonstrates that school and class size significantly impact educational outcomes—more than facility quality. Based on this evidence and my personal educational experience in smaller schools, I believe maintaining three separate elementary schools better serves our students' needs.

Rather than suggesting a specific alternative, I encourage our town and school board to develop creative solutions that preserve our smaller learning environments. One potential approach could include building one new school immediately while seeking MSBA aid, then upgrading the remaining two schools to adequate standards. We could implement a rotation system among the buildings to ensure equitable access for all students, particularly since all schools are within close proximity. Over time, we would then plan to replace the remaining two schools.

This approach would likely cost more over time, but I believe this represents a worthwhile investment in our children's education rather than prioritizing short-term financial considerations alone.

In the commentary that follows below, FINCOM is addressing a set of topics which we believe are important. Many questions have been asked and answered over the past two years by the School Building Committee and the School Administration.

Please refer to the Hamilton-Wenham Regional School District website and explore the Frequently Asked Questions (FAQs) section under the “HW Elementary School Project” page. Many financial related questions have been addressed in the various questions and answers presented there.

Background and Discussion

Investments in School Facilities – A Look Back....and Forward

As we all review capital spending projects, whether they are personal or business related, we ask ourselves some version of the following questions:

“What is the value derived from the investment?” What do we get for the investment?” or more simply stated.... ”What is the “return on investment.” “What do we get for our money?”.

As we look at a proposed new school investment, we will use this “Return on Investment” viewpoint.

When viewing any proposed investment, it is wise to consider the condition of the entire “portfolio” of assets under consideration. In this case our portfolio is our collection of school properties. Let’s view our previous school “investments” to set some context.

School Investments – A Look Back...and Forward

| | \$ | Greatest Generation | Baby Boomers | Gen X, Millennials, Gen Z | | |
|--|--------------------|---|-----------------------------|---------------------------|--|---------------------|
| | | 1950 – 1974 (25 Years) | 1975 – 1999 (25 Years) | 2000 – 2024 (25 Years) | 2025 – 2049 (25 Years) | 2050 -> |
| <p>In the 1950's and 60's ...</p> <p>The "Greatest Generation"....</p> <p>....responded to the post-WWII demand for school capacity in Hamilton & Wenham... and embarked on a building campaign....</p> <p>...from which the Cutler, Buker, Winthrop & High schools emerged.</p> | School | Constructed – '51 Additions – '52, '56 | Addition – '92 | X | <div style="border: 2px solid red; padding: 5px;"> <p>Combined Elementary School</p> <p>→740 Students 127,298 sq ft</p> <ul style="list-style-type: none"> • 172 sq ft per student • \$ 142M – Gross Cost • \$193k gross per student • \$124k net per student <p>\$ 49M – MSBA</p> <p>\$61M - Hamilton</p> </div> | |
| | Cutler | | | | | |
| | Winthrop | Constructed – '59 Additions – '66 | X | X | | |
| | Buker | Constructed – '53 Additions – '55 | Addition – '89 | X | | |
| | High School | Constructed – '61 | Renovation / Addition – '99 | X | | |
| | Miles River | - | Constructed – '99 | X | | |
| | | | | | | Investment Required |

The chart above provides a historical view of the construction / addition projects undertaken for each school in the District starting in the 1950s. The oldest school in the portfolio is the Cutler School with the original construction dating to 1951.

Of particular note are the two ~25-year time - periods between major construction projects. These “paced” investments have allowed the District to finance and repay the associated debt obligation while trying to avoid layering one project upon another. This profile suggests that each “generation” in Hamilton and Wenham has invested in new school facilities, in a periodic manner, to benefit not only the current generation of students but also for future generations of students. This is a key pillar of public education in the U.S.

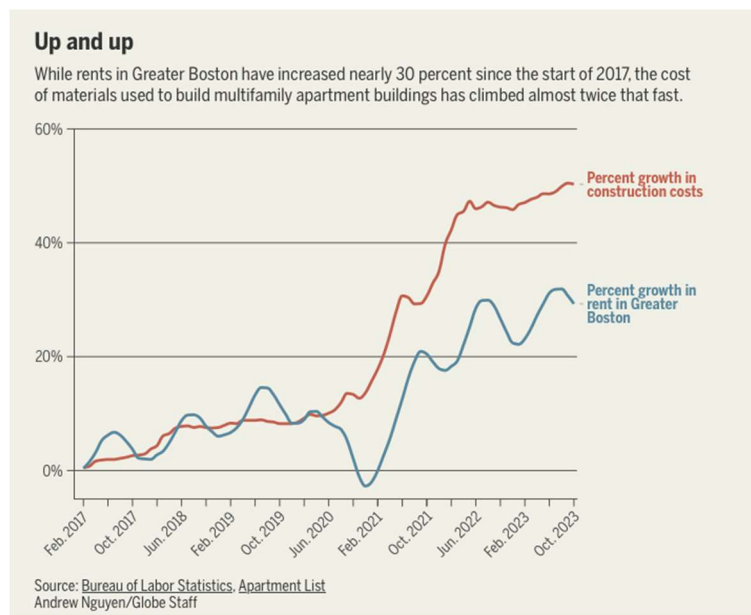
As mentioned above, as with any portfolio of investments/assets, it is wise to review the condition of those assets and determine if a replacement or alternative investment, with a higher performing return, should be utilized. The FINCOM believes the HWRSD is now at a point where a significant investment in the school portfolio is warranted. We do not advise inventing ten-of-millions of dollars in 1950s designed buildings. This point of view is supported by the evaluation of the Cutler School by the MSBA.

- **As stated above, consolidating two schools removes two old buildings from the HWRSD building “portfolio” and removes the need for future investment in these two old buildings. This would allow the District to redirect focus on the other schools in the District.**

Construction Cost Increases – Some Reference Points. (Boston Globe, MSBA Construction Analytics)

To provide a point-of-view regarding the construction cost increases we have observed, we used the following:

- 1. Boston Globe Spotlight** - We were drawn to the Boston Globe “Spotlight” article dated December 2023. While the article does not align precisely with the Hamilton School Building Project, it does provide a valuable reference point regarding construction cost increases in the Greater Boston area. (Please take the time to go back and read this series of articles.) The chart below was included in this “Spotlight” article and is sourced from the Bureau of Labor Statistics. It indicates construction cost increases of 50% in the apartment building sector.

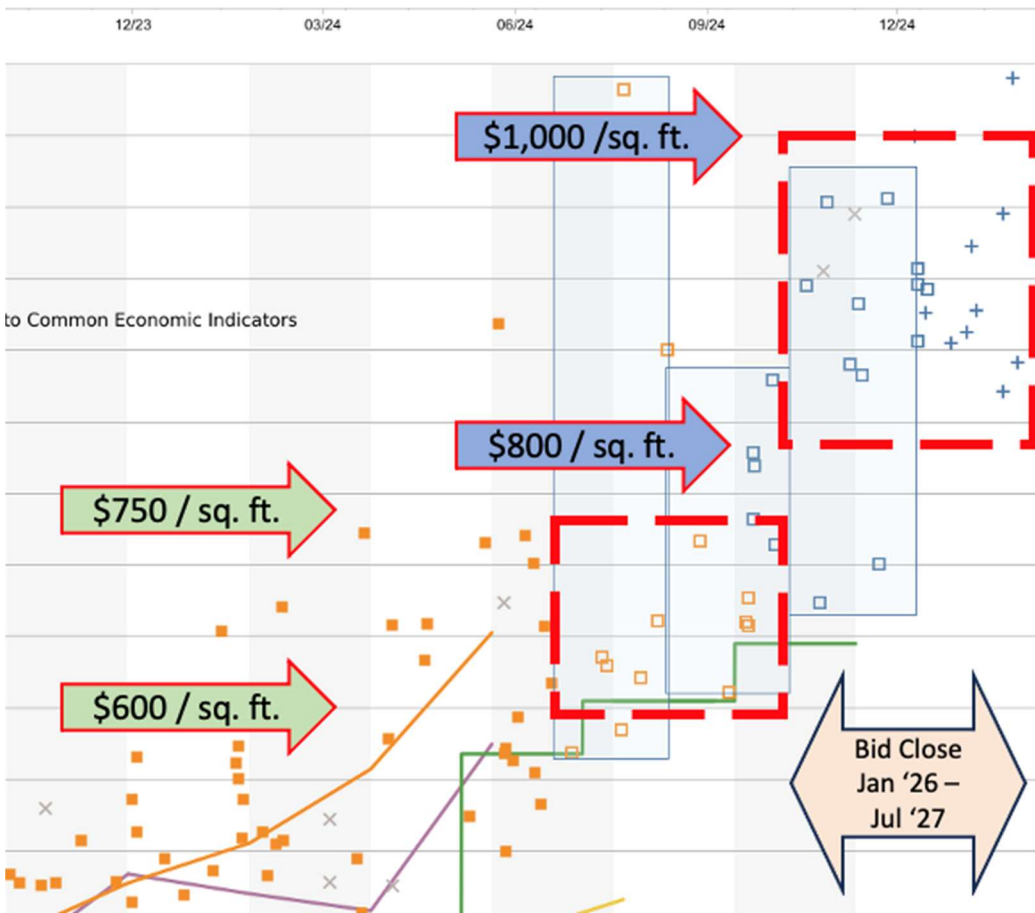
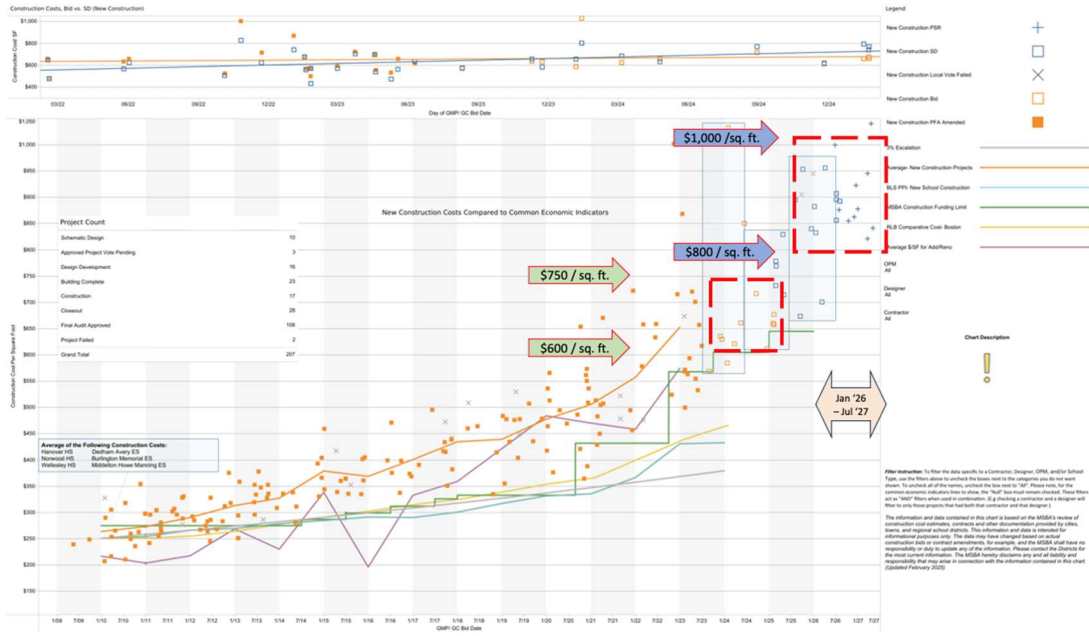


- 2. Massachusetts School Building Authority (MSBA)** – The second source we used for construction cost information is the Massachusetts School Building Authority (MSBA).

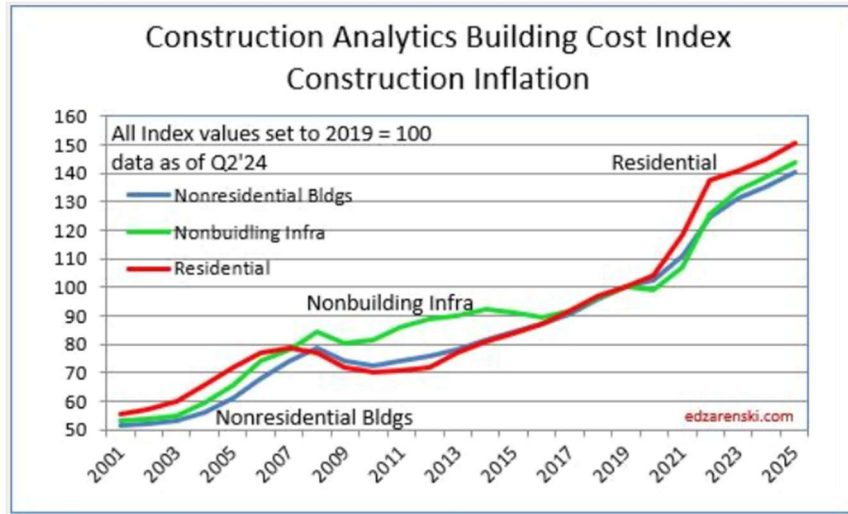
While it is unlikely the chart below will be easily readable (please go to the MSBA website), the rightmost area of the chart provides some visual insight into the aggressive cost per square foot increases being realized and presented to the MSBA for recent school building projects. These cost increases are in the 30% - 50% range. The key point is that new construct costs have now moved into the \$800 - \$1,000 per square foot range.

ATM - New School Warrant – MSBA “New” Construction Cost

School "New" Construction Costs
 File created on: 3/16/2025 – Source: MSBA Website



3. **Ed Zarenski is a construction economics analyst.** He authors his research under the name “Construction Analytics.” He has been in the construction industry for 42 years. The most vivid expression from Ed is below which illustrates the construction cost dynamics with 2019 as the base year. He is showing 40% - 50% cost increases.



4. **Boston Globe - February 2025 – School Construction Cost Increases**

The increases in Massachusetts are similar to those across the nation, which are causing project costs to soar. According to the US Bureau of Labor Statistics, new school construction costs nationwide have spiked more than 32 percent since January 2020.

School construction costs nationwide have grown by about one-third in just five years.

Federal data show producer prices surged rapidly from 2021 to 2023.

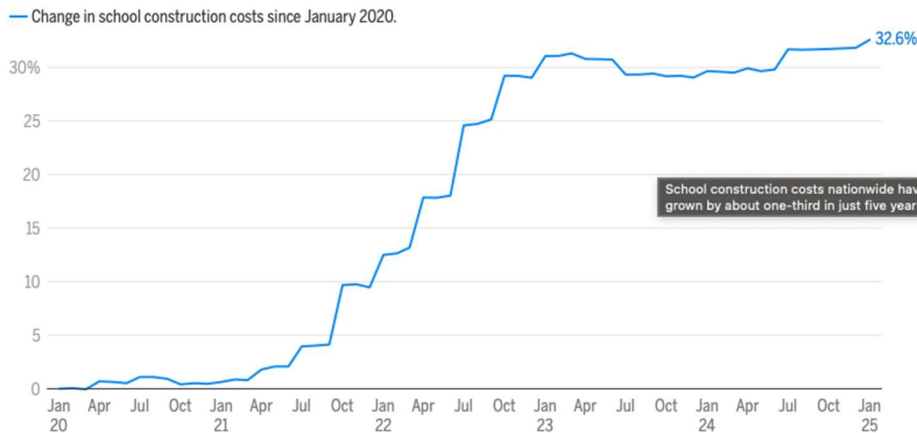


Chart: CHRISTOPHER HUFFAKER/GLOBE STAFF • Source: U.S. Bureau of Labor Statistics via FRED®

And those increases could worsen if President Trump proceeds with placing tariffs on an assortment of imports, which could include 25 percent tariffs on steel and lumber, according to [a White House announcement](#) and [multiple media reports](#).

\$700 million for a high school? Boston now seeking state funds to rebuild Madison Park as estimated costs balloon.

By Christopher Huffaker Globe Staff, Updated February 20, 2025, 6:05 a.m.



The recent estimate of \$700 million would make the revamped Madison Park Technical Vocational High School the most expensive in state history. JONATHAN WIGGS/GLOBE STAFF

Generations of students have cycled through Boston's lone vocational high school, enduring periods of neglect, failed leadership, and broken promises until finally a beacon of hope emerged in 2023 with Mayor Michelle's Wu proposal to rebuild the Roxbury campus, [even doubling it in size](#).

Multiple Mass. schools that surpass half a billion? They're on the horizon as the cost of construction projects sharply rise.

By James Vaznis Globe Staff, Updated February 26, 2025, 12:01 p.m.



Recently completed portions of the Lowell High School during the ongoing renovation project. JONATHAN WIGGS/GLOBE STAFF/BOSTON GLOBE

The price tag for new public schools in Massachusetts [has risen sharply](#) over the last five years, with high schools increasingly exceeding \$300 million and at least two projects each likely to cost more than \$700 million.

These reference points provide some insight as to what is happening in the commercial construction sector of the U.S. Economy as well as locally.

Massachusetts School Building Authority Program – October 2022 – February 2025

In 2021, the Hamilton Wenham Regional School District (“District”) submitted a Statement of Interest (SOI) to the Massachusetts School Building Authority (“MSBA”) for the proposed Cutler Elementary School building project (Project). Previous SOIs were submitted in 2018, 2019 and 2020. The MSBA partners with Massachusetts communities to support the design and construction of educationally - appropriate, flexible, sustainable, and cost-effective public-school facilities. The Authority is a financing agency that utilizes its dedicated funding source (one penny of the Massachusetts State 6.25% sales tax) to fund school building projects across the state.

The MSBA program is highly structured and consists of three Phases:

1) Eligibility Period - (Preparation)

- a. Compliance Certification - Completed
- b. Forming the School Building Committee - Completed
- c. Educational Profile & Enrollment Process - Completed
- d. Maintenance & Capital Planning Documents - Completed
- e. Local Vote Authorization (District & Hamilton / Wenham vote required) – Approved October 2022 STM

2) Scope Definition (Scoping)

- a. Forming the Project Team (School Building Committee) - Completed
- b. Feasibility Study - Completed
- c. Schematic Design - Completed
- d. Funding the Project
 - o Hamilton/Wenham vote required) – April 2025

3) Scope Monitoring

- a. Detailed Design

- b. Construction
- c. Completing the Project

In March 2022, the District received an invitation into the “Eligibility Period” (EP) of the MSBA program. The District has completed five elements (# 1a – #1e) of the EP program, including the submission of maintenance and capital planning documentation. (This subject is addressed by the MSBA to determine how the District maintained its facilities. It will be discussed below.)

In October 2022, both Hamilton and Wenham voted to provide approval to participate in the program and authorized \$1.25M to support the “Scope Definition” phase of the program.

The School Committee, the School Building Committee and the School District Administration engaged the MSBA school building process subsequent to the October 2022 vote. Since that time, the School Building Committee has completed three of the four elements of the “Scope Definition” phase. (Elements 2a – 2c)

Educational Plan / Program

An “Educational Plan” is required by the MSBA to conceive, in detail, the educational priorities a new building should satisfy.

- **The Educational Plan is the key driver of the building design. This design drives the features and square footage of the building. The cost is derived from the features and square footage included in the building design.**
- To develop an Educational Plan, the School Building Committee invited community members, teachers, staff, and students into a visioning process, in October 2023, for what a new elementary school could provide to our elementary students and our community. Also, feedback was solicited through surveys, community forums, presentations at community events and meetings, school tours, workshops, and many touch points over the course of a year to gather a broad perspective for the project.
- Visioning Sessions:
 - October 5, 2023 – Visioning Session #1 - (0 Parents Attended)
 - October 11, 2023 – Visioning Session #2 - (3 parents Attended)
 - October 18, 2023 – Visioning Session #3 - (8 parents Attended)

The resulting Educational Plan was published in early 2024 and serves as the key driver of the design of the school facility. Ultimately, the design created by the school District and brought forward for consideration, must be in alignment with Educational Plan or funding from the MSBA is at risk. It is up to the District to ensure the building design aligns with the Educational Plan.

Additional Background from the MSBA regarding the Educational Plan / Program

During Feasibility Study, the District will document its educational program, define the proposed educational activities, and work with its Designer to develop design responses to meet the educational objectives and needs identified.

Educational Program Requirements

The District's educational program must include the following:

- A statement of the teaching philosophy and methods.
- A thorough, in-depth explanation of the District's curriculum goals, and objectives of the program elements associated with the subject facility
- District's educational program should describe and include, but not necessarily be limited to, the following as it relates to the current program, facility needs, and proposed program and design features:

1. Grade and School Configuration Policies
2. Class Size Policies
3. School Scheduling Method
4. Teaching Methodology and Structure
5. Teacher Planning
6. Professional Development
7. Pre-kindergarten (e.g., Special Education only, tuition programs, locations,)
8. Kindergarten (e.g., full day, half day, locations, if applicable)
9. Lunch Programs (e.g., number of servings, District kitchen, full-service kitchens,
10. Technology Instruction Policies and Program Requirements (e.g., labs, in-
11. Media Center/Library
12. Visual Art Programs (e.g., in-classroom, specialized area, etc.)
13. Performing Arts Programs (e.g., music, dance, drama theater, etc)
14. Physical Education Programs
15. Special Education Programs (e.g., in-house, collaborative, facility restrictions)
16. Vocations and Technology Programs
17. Transportation Policies
18. Functional and Spatial Relationships
19. Security and Visual Access Requirements
20. Typical Day and Week in the Life of a Student

So Why are Schools Built currently Materially Larger than those built in 1950s ?

While there's no single definitive average, schools built in the 1950s generally had less square footage per student than schools built today, with a focus on basic needs, while current schools prioritize larger, more flexible spaces for diverse learning needs.

Here's a more detailed comparison:

Schools of the 1950s:

- **Focus:** Primarily on basic education, with classrooms often designed for rote memorization and traditional teaching methods.
- **Square Footage:** Classrooms were often smaller, with a focus on maximizing the number of students in a given space.
- **Design:** Classrooms tended to be rectangular with rows of desks facing the front, and a teacher at the front.
- **Other Spaces:** Often had limited space for specialized areas like libraries, computer labs, or art rooms.

Modern Schools:

- **Focus:** Emphasize student-centered learning, critical thinking, and creativity, with a focus on fostering collaboration and problem-solving skills.
- **Square Footage:** Classrooms are larger, with more flexible spaces that can be adapted to different learning activities.
- **Design:** Classrooms are designed to promote collaboration and creativity, with flexible furniture, breakout areas, and technology integration.
- **Other Spaces:** Include specialized areas like libraries, computer labs, art rooms, and science labs, as well as spaces for collaboration and small group work.

Renovation vs New Construction:

Now, let’s review the Cutler school project in more detail to unpack the Addition / Renovation subject and focus specifically on Option (C2.1) that was developed by the design team and presented below:

| Comparisons: | MSBA - Approved Projects | | HW School Building Committee Options | | | | | Apr '25 ATM Preferred Option |
|--------------------------------|--------------------------|-------------------------|--------------------------------------|-------------|-------------|-------------|-------------|------------------------------|
| | 10 Projects 10/22 ATM | Average 4 MSBA Projects | C1.0 | C2.1 | C3.1 | C3.3 | C3.4 | |
| | | | Code Upgrade | Add / Reno | New | New | New | |
| School Project Cost (Millions) | \$ 85 | \$ 107 | \$ 46 | \$ 115 | \$ 106 | \$ 142 | \$ 151 | \$ 142 |
| Enrollment | 652.5 | 550 | 285 | 285 | 285 | 645 | 740 | 740 |
| Cost per Student | 0 | | | | | | | |
| Gross | \$ 130,599 | \$ 195,233 | \$ 159,958 | \$ 403,941 | \$ 373,223 | \$ 220,734 | \$ 203,832 | \$ 192,251 |
| Net | \$ 82,543 | \$ 115,454 | \$ 148,760 | \$ 269,263 | \$ 248,787 | \$ 147,139 | \$ 135,872 | \$ 124,982 |
| Gross Square Feet | 119,627 | 101,941 | 45,800 | 83,945 | 83,945 | 128,939 | 127,298 | 127,298 |
| Total Sq. Ft per Student | 183 | 185 | 161 | 295 | 295 | 200 | 172 | 172 |
| Gross Square Feet | 119,627 | 101,941 | 45,800 | 83,945 | 83,945 | 128,939 | 127,298 | 127,298 |
| Construction Cost | 67,276,105 | 85,914,072 | 35,435,298 | 89,484,891 | 82,679,868 | 110,666,365 | 117,244,050 | 108,493,509 |
| Construction Cost Per SF | 562 | 843 | 774 | 1,066 | 985 | 858 | 921 | 852 |
| Total Project | 85,216,070 | 107,378,392 | 45,587,892 | 115,123,275 | 106,368,540 | 142,373,470 | 150,835,732 | 142,266,034 |
| Total Cost Per SF | 712 | 1,053 | 995 | 1,371 | 1,267 | 1,104 | 1,185 | 1,118 |

- The current Cutler School encompasses 45,800 sq. ft.
- The Addition / Renovation option reflecting the Educational Plan features and space ... grows to 83,945 sq. ft.

- This expansion of the footprint of the school accounts for a sizable portion of the “Add Reno” cost.
- If we were to *hypothetically* “split” the costs of C2.1 into two components:
 - the “Reno” portion is \$63M (54%) and
 - the “Add” portion is \$52M (46%).

| School Building Option 2.1 Scenario: "Split "Add / Reno" | | | | | |
|--|---------------------------|----------------------------|-----------------------|----------------------|----------------------|
| | | C2.1 Addition / Renovation | | | |
| | | C1.0 | C2.1 | C2.1 "Reno" | C2.1 "Add" |
| | | Code Upgrade | Add / Reno | "Reno" | "Add" |
| School Project Cost | Millions of \$ | \$ 46 | \$ 115 | \$ 63 | \$ 52 |
| Size | Square Footage | 45,800 | 83,945 | 45,800 | 38,145 |
| # of Students | # of Students in Building | 285 | 285 | 285 | 285 |
| | Sq. Ft. / Student | 161 | 295 | 161 | 134 |
| "Gross" Project Cost | | \$ 45,587,892 | \$ 115,123,275 | \$ 62,810,721 | \$ 52,312,554 |
| State Contribution | | \$ (3,191,152) | \$ (38,383,251) | \$ (20,941,723) | \$ (17,441,529) |
| "Net" Project Cost to HWRSD | | \$ 42,396,740 | \$ 76,740,024 | \$ 41,868,999 | \$ 34,871,025 |
| "Gross" Cost per Student | | \$ 159,958 | \$ 403,941 | \$ 220,388 | \$ 183,553 |
| "Net" Cost per Student | | \$ 148,760 | \$ 269,263 | \$ 146,909 | \$ 122,354 |

While this “Add/Reno” expression is simply a mathematical model, it does give us a view into what a “Renovation” of the existing 45,800 sq. ft. Cutler building might be valued at. This “Reno” scenario retains the footprint of the 1950’s space design of the Cutler School. It would not address the desired enhancement elements contained in the Educational Plan. (Presenting this “hypothetical” valuation does not mean we could do this project with the involvement of the MSBA, it is simply a valuation “model.”)

FINCOM Discussion of Proposed School Building Project – at Annual Town Meetings 2022 - 2024....What have we shared previously with Taxpayers...?

October 2022 – Special Town Meeting (STM), Both Hamilton and Wenham voted to provide approval to participate in the MSBA “Feasibility Study” component of program and authorized \$1.25M to support the “Scope Definition” phase of the program. (The MSBA has been reimbursing the District over the past year, and it is anticipated the reimbursement will intimately be 48% of the \$1.25M.) FINCOM included a detailed overview of the MSBA program (in the Book of Recommendations) and urged voters to educate themselves about the program. A financial overview of 10 recent school projects was also included. Given the age and condition of the school facilities across the District, and the size of the “subsidy” FINCOM supported providing funding for the Feasibility Study.

April 2023 - Annual Town Meeting (ATM), At the meeting, FINCOM presented a capital forecast and tax impact inclusive of the School District and Town. The assumptions supporting the “New School – Cutler Elementary Project” profile was assumed to be a 700-student building with a cost in the range of \$85M - \$120M. This was a 143,000 sq. ft. building. The annual tax impact presented was **\$700 - \$1,200** for a house valued at \$713,000. (Keep in mind these were estimates for a project completing five years in the future.)

Capital Spending & Tax Impact - Estimate -- FY '24 - FY '30

| | Project | Gross Capital* in Millions | Hamilton - Estimated Annual Tax Impact** for a Home valued at \$713,000 | Comments * Gross Capital equals total Project Cost before reductions, reimbursements and offsets. ** The Estimated Annual Tax Impact is correspondingly reduced by any expected funding outside of property taxes. |
|--|--|----------------------------|---|--|
| School District | New School - Cutler Elementary Project | \$85M - \$120M | \$700 - \$1,200 | Tax impact estimate assumes reimbursement by MSBA (State) and Wenham contribution @ 34%. |
| | Fields at High School | \$15M | \$250 - \$300 | Tax impact estimate assumes offsets from Gifts, Grants, Fundraising (E&D, CPC, etc) and Wenham contribution @ 34%. |
| | High School Roof Replacement | \$2M | \$18 | Tax impact estimate assumes reimbursement by State and Wenham contribution @ 34%. |
| | All other | \$10M | \$78 | Tax impact estimate assumes Wenham contribution @ 34%. |
| | Sub-Total School Capital | \$112M - \$147M | \$1,046 - \$1,596 | |
| Hamilton | Water Projects | \$10M | \$0 | Water projects are generally funded from Water Revenue paid by each taxpayer. (Not a tax but a usage fee) |
| | Town Hall Renovation | \$6M | \$0 | Renovations are expected to be funded by previously approved CPC grant and Free cash available. (All funds sourced from taxpayers) |
| | All Other | \$6M | \$134 | Tax impact estimate assumes no funding outside of property taxes. |
| | Sub-Total Town Capital | \$22M | \$134 | |
| Total School & Town Capital | | \$134M - \$169M | \$1,180 - \$1,730 | |

Note: Since 2019 operational budget increases from the Town and School have increased Hamilton's Property Taxes at a compounded annual growth rate of 5.92% or \$592 per year for a home with a value of \$713,000. The tax impact of capital projects would be in addition to annual increases from operational budgets.

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ATM - Capital / Financial Overview - Notes

1

April 2024 Annual Town Meeting, the FINCOM presented a capital forecast and tax impact inclusive of the School District and Town. This included a school which would house 740 students. The capital cost was in the range of \$44M - \$151M. The annual tax impact presented was **\$678 - \$1,569** for a house valued at \$798,000.

(The “Elementary School Project” “profile” included 14 building options with the largest building being 123,000 sq. ft.)

| Capital* Spending & Estimated Impact -- FY '25 - FY '31 | | | | Estimates by FINCOM |
|---|---|----------------------------|---|--|
| | Project | Gross Capital* in Millions | Hamilton - Estimated Annual Tax Impact** for a Home valued at \$798,000 | Comments * Gross Capital equals total Project Cost before reductions, reimbursements and offsets. These amounts are gathered from the School and Town budgets and are incremented by FINCOM to project likely additional outlays for the 7.5-year period. ** The Estimated Annual Tax Impact is reduced by any expected funding outside of property taxes. This estimate includes interest from financing capital @ 5% over 30 years. (1) The range represents a total of 14 potential scenarios that have been examined by the School Building Committee 2) Tax impact estimate assumes: - Reimbursement by MSBA (State) - (\$0M - \$47M) - Wenham contribution @ 34%. (3) Certain elementary school capital spending is avoided with the construction of “combined” new school. |
| School District | Elementary School Project | \$44M / \$151M (1) | \$678 - \$1,569 (2,4) | |
| | High School Roof Replacement | \$5M | \$41 | Tax impact estimate assumes reimbursement by State & Wenham contribution @ 34%. |
| | High School / Middle School | \$2M | \$28 | Tax impact estimate assumes Wenham contribution @ 34%. |
| | All other (HS/MS - Flooring Replacement, Boiler Plant Phased Replacement, Windows Replacement, HVAC Control Upgrade, Interior Painting,) | \$11M / \$2M (3) | \$149 - \$27 | Tax impact estimate assumes Wenham contribution @ 34%. |
| | Sub-Total School Capital | \$62M - \$160M | \$896 - \$1,665 | |
| Hamilton | Water Projects | \$10M | \$0 | Water projects are funded from Water bills paid by each taxpayer. These rates will likely rise due to increased investment in infrastructure and source projects. (In 2024, FINCOM will be undertaking an updated analysis of projected revenues and costs.) |
| | Vehicles | \$2M | \$28 | Tax impact estimate assumes no funding outside of property taxes. |
| | All Other (Highways, Facilities, Recreation) | \$9M | \$184 | Tax impact estimate assumes no funding outside of property taxes. |
| | Sub-Total Town Capital | \$21M | \$212 | |
| Total School & Town Capital | | \$83 / \$181M | \$1,108 - \$1,877 | |

(4) Note: The Hamilton Wenham Regional School District is currently evaluating multiple elementary school project options. These “options” range from \$44 Million for a “Base Repair / Code Upgrade” to multiple “Combined” School options; the largest at \$151 Million. If one of the “Combined” options is selected, this would allow Hamilton to sell one of the existing school sites. One possible scenario for a sale and subsequent development would yield a potential tax benefit of ~ \$500k per year (\$186k-yr on an average tax bill) or \$22 million over the 30-year financing term of the new school building.

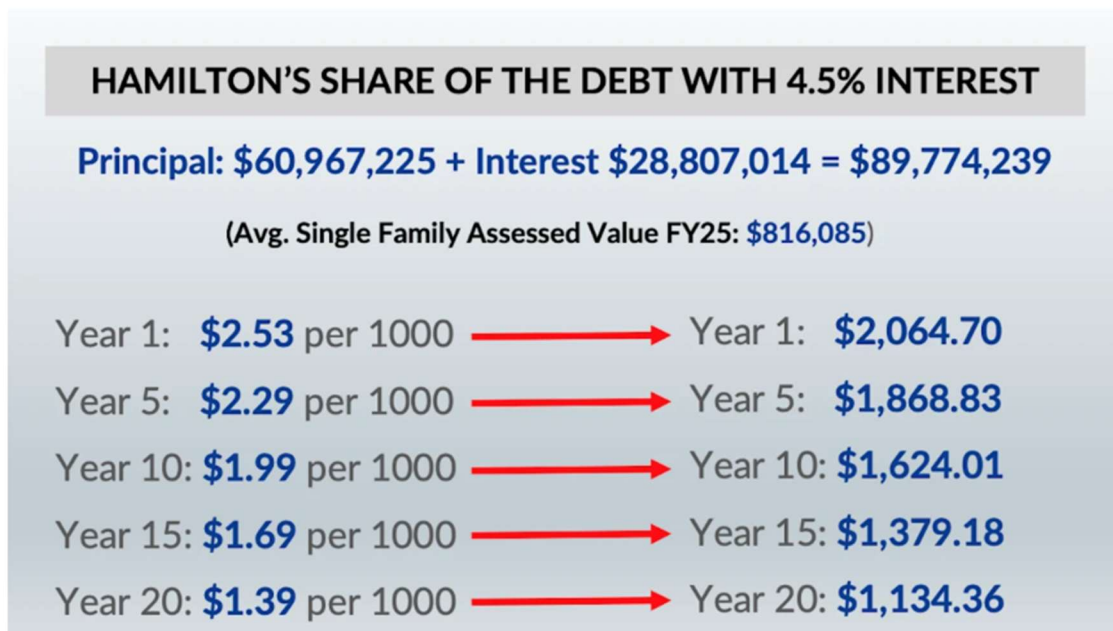
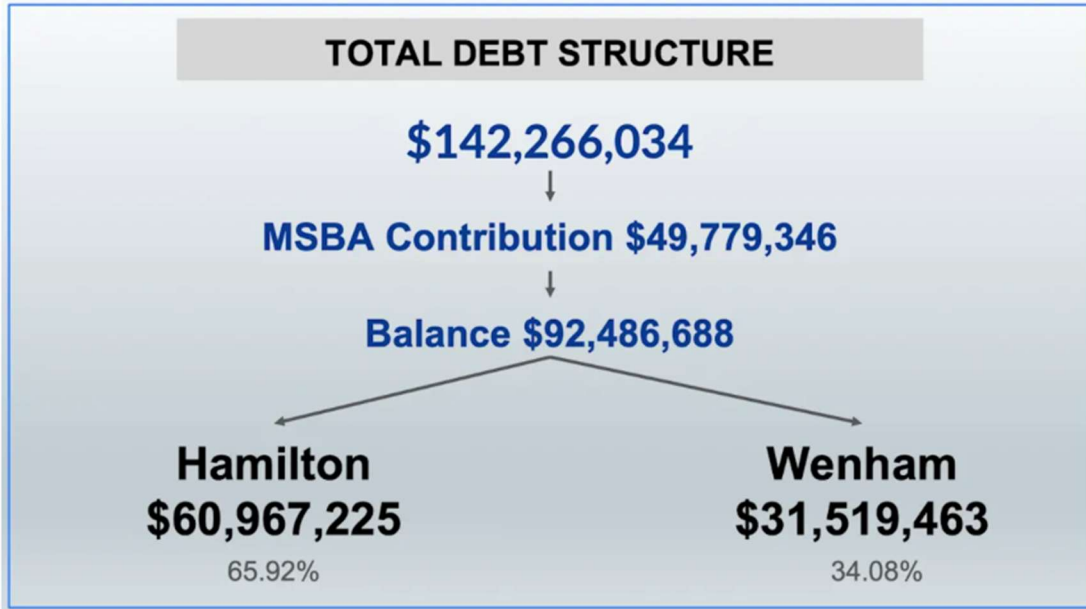
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ATM - Capital / Financial Overview - Notes

1

Both charts are housed on the FINCOM town website.

Tax Impact of Proposed School - from the HWRSD Project Website



The rate per thousand will decrease each year. These numbers represent the rate per thousand in 5-year increments.

Tax Impact of Proposed School - from the HWRSD Project Website (Continued)

HAMILTON Average home assessment

Residential Tax Rate \$15.65

| Year: | YEAR 1 2028 | YEAR 2 2029 | YEAR 3 2030 | YEAR 4 2031 | YEAR 5 2032 | YEAR 6 2033 | YEAR 7 2034 | YEAR 8 2035 | YEAR 9 2036 | YEAR 10 2037 |
|--------------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|-----------------|
| Debt: | \$5,791,886.35 | \$5,654,710.09 | \$5,517,533.84 | \$5,380,357.59 | \$5,243,181.33 | \$5,106,005.07 | \$4,968,822.81 | \$4,831,652.56 | \$4,694,476.31 | \$4,557,300.05 |
| Tax Rate Impact: | \$2.53 | \$2.47 | \$2.41 | \$2.35 | \$2.29 | \$2.23 | \$2.17 | \$2.11 | \$2.05 | \$1.99 |
| House Value | | | | | | | | | | |
| \$100,000.00 | \$253.00 | \$247.00 | \$241.00 | \$235.00 | \$229.00 | \$223.00 | \$217.00 | \$211.00 | \$205.00 | \$199.00 |
| \$200,000.00 | \$506.00 | \$494.00 | \$482.00 | \$470.00 | \$458.00 | \$446.00 | \$434.00 | \$422.00 | \$410.00 | \$398.00 |
| \$300,000.00 | \$759.00 | \$741.00 | \$723.00 | \$705.00 | \$687.00 | \$669.00 | \$651.00 | \$633.00 | \$615.00 | \$597.00 |
| \$400,000.00 | \$1,012.00 | \$988.00 | \$964.00 | \$940.00 | \$916.00 | \$892.00 | \$868.00 | \$844.00 | \$820.00 | \$796.00 |
| \$500,000.00 | \$1,265.00 | \$1,235.00 | \$1,205.00 | \$1,175.00 | \$1,145.00 | \$1,115.00 | \$1,085.00 | \$1,055.00 | \$1,025.00 | \$995.00 |
| \$600,000.00 | \$1,518.00 | \$1,482.00 | \$1,446.00 | \$1,410.00 | \$1,374.00 | \$1,338.00 | \$1,302.00 | \$1,266.00 | \$1,230.00 | \$1,194.00 |
| \$700,000.00 | \$1,771.00 | \$1,729.00 | \$1,687.00 | \$1,645.00 | \$1,603.00 | \$1,561.00 | \$1,519.00 | \$1,477.00 | \$1,435.00 | \$1,393.00 |
| \$800,000.00 | \$2,024.00 | \$1,976.00 | \$1,928.00 | \$1,880.00 | \$1,832.00 | \$1,784.00 | \$1,736.00 | \$1,688.00 | \$1,640.00 | \$1,592.00 |
| \$816,085.00 | \$2,064.70 | \$2,015.73 | \$1,966.76 | \$1,917.80 | \$1,868.83 | \$1,819.87 | \$1,770.90 | \$1,721.94 | \$1,672.97 | \$1,624.01 |
| \$900,000.00 | \$2,277.00 | \$2,223.00 | \$2,169.00 | \$2,115.00 | \$2,061.00 | \$2,007.00 | \$1,953.00 | \$1,899.00 | \$1,845.00 | \$1,791.00 |
| \$1,000,000.00 | \$2,530.00 | \$2,470.00 | \$2,410.00 | \$2,350.00 | \$2,290.00 | \$2,230.00 | \$2,170.00 | \$2,110.00 | \$2,050.00 | \$1,990.00 |
| \$1,100,000.00 | \$2,783.00 | \$2,717.00 | \$2,651.00 | \$2,585.00 | \$2,519.00 | \$2,453.00 | \$2,387.00 | \$2,321.00 | \$2,255.00 | \$2,189.00 |
| \$1,200,000.00 | \$3,036.00 | \$2,964.00 | \$2,892.00 | \$2,820.00 | \$2,748.00 | \$2,676.00 | \$2,604.00 | \$2,532.00 | \$2,460.00 | \$2,388.00 |
| \$1,300,000.00 | \$3,289.00 | \$3,211.00 | \$3,133.00 | \$3,055.00 | \$2,977.00 | \$2,899.00 | \$2,821.00 | \$2,743.00 | \$2,665.00 | \$2,587.00 |
| \$1,400,000.00 | \$3,542.00 | \$3,458.00 | \$3,374.00 | \$3,290.00 | \$3,206.00 | \$3,122.00 | \$3,038.00 | \$2,954.00 | \$2,870.00 | \$2,786.00 |
| \$1,500,000.00 | \$3,795.00 | \$3,705.00 | \$3,615.00 | \$3,525.00 | \$3,435.00 | \$3,345.00 | \$3,255.00 | \$3,165.00 | \$3,075.00 | \$2,985.00 |
| \$1,600,000.00 | \$4,048.00 | \$3,952.00 | \$3,856.00 | \$3,760.00 | \$3,664.00 | \$3,568.00 | \$3,472.00 | \$3,376.00 | \$3,280.00 | \$3,184.00 |
| \$1,700,000.00 | \$4,301.00 | \$4,199.00 | \$4,097.00 | \$3,995.00 | \$3,893.00 | \$3,791.00 | \$3,689.00 | \$3,587.00 | \$3,485.00 | \$3,383.00 |
| \$1,800,000.00 | \$4,554.00 | \$4,446.00 | \$4,338.00 | \$4,230.00 | \$4,122.00 | \$4,014.00 | \$3,906.00 | \$3,798.00 | \$3,690.00 | \$3,582.00 |
| \$1,900,000.00 | \$4,807.00 | \$4,693.00 | \$4,579.00 | \$4,465.00 | \$4,351.00 | \$4,237.00 | \$4,123.00 | \$4,009.00 | \$3,895.00 | \$3,781.00 |
| \$2,000,000.00 | \$5,060.00 | \$4,940.00 | \$4,820.00 | \$4,700.00 | \$4,580.00 | \$4,460.00 | \$4,340.00 | \$4,220.00 | \$4,100.00 | \$3,980.00 |
| \$2,100,000.00 | \$5,313.00 | \$5,187.00 | \$5,061.00 | \$4,935.00 | \$4,809.00 | \$4,683.00 | \$4,557.00 | \$4,431.00 | \$4,305.00 | \$4,179.00 |
| \$2,200,000.00 | \$5,566.00 | \$5,434.00 | \$5,302.00 | \$5,170.00 | \$5,038.00 | \$4,906.00 | \$4,774.00 | \$4,642.00 | \$4,510.00 | \$4,378.00 |
| \$2,300,000.00 | \$5,819.00 | \$5,681.00 | \$5,543.00 | \$5,405.00 | \$5,267.00 | \$5,129.00 | \$4,991.00 | \$4,853.00 | \$4,715.00 | \$4,577.00 |
| \$2,400,000.00 | \$6,072.00 | \$5,928.00 | \$5,784.00 | \$5,640.00 | \$5,496.00 | \$5,352.00 | \$5,208.00 | \$5,064.00 | \$4,920.00 | \$4,776.00 |
| \$2,500,000.00 | \$6,325.00 | \$6,175.00 | \$6,025.00 | \$5,875.00 | \$5,725.00 | \$5,575.00 | \$5,425.00 | \$5,275.00 | \$5,125.00 | \$4,975.00 |

HAMILTON Average home assessment

Residential Tax Rate \$15.65

| Year: | YEAR 11 2038 | YEAR 12 2039 | YEAR 13 2040 | YEAR 14 2041 | YEAR 15 2042 | YEAR 16 2043 | YEAR 17 2044 | YEAR 18 2045 | YEAR 19 2046 | YEAR 20 2047 |
|--------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| Debt: | \$4,420,123.79 | \$4,282,947.54 | \$4,145,771.28 | \$4,008,595.02 | \$3,871,418.77 | \$3,734,242.51 | \$3,597,066.26 | \$3,459,890.00 | \$3,322,713.75 | \$3,185,537.49 |
| Rate Impact: | \$1.93 | \$1.87 | \$1.81 | \$1.75 | \$1.69 | \$1.63 | \$1.57 | \$1.51 | \$1.45 | \$1.39 |
| House Value | | | | | | | | | | |
| \$100,000.00 | \$193.00 | \$187.00 | \$181.00 | \$175.00 | \$169.00 | \$163.00 | \$157.00 | \$151.00 | \$145.00 | \$139.00 |
| \$200,000.00 | \$386.00 | \$374.00 | \$362.00 | \$350.00 | \$338.00 | \$326.00 | \$314.00 | \$302.00 | \$290.00 | \$278.00 |
| \$300,000.00 | \$579.00 | \$561.00 | \$543.00 | \$525.00 | \$507.00 | \$489.00 | \$471.00 | \$453.00 | \$435.00 | \$417.00 |
| \$400,000.00 | \$772.00 | \$748.00 | \$724.00 | \$700.00 | \$676.00 | \$652.00 | \$628.00 | \$604.00 | \$580.00 | \$556.00 |
| \$500,000.00 | \$965.00 | \$935.00 | \$905.00 | \$875.00 | \$845.00 | \$815.00 | \$785.00 | \$755.00 | \$725.00 | \$695.00 |
| \$600,000.00 | \$1,158.00 | \$1,122.00 | \$1,086.00 | \$1,050.00 | \$1,014.00 | \$978.00 | \$942.00 | \$906.00 | \$870.00 | \$834.00 |
| \$700,000.00 | \$1,351.00 | \$1,309.00 | \$1,267.00 | \$1,225.00 | \$1,183.00 | \$1,141.00 | \$1,099.00 | \$1,057.00 | \$1,015.00 | \$973.00 |
| \$800,000.00 | \$1,544.00 | \$1,496.00 | \$1,448.00 | \$1,400.00 | \$1,352.00 | \$1,304.00 | \$1,256.00 | \$1,208.00 | \$1,160.00 | \$1,112.00 |
| \$816,085.00 | \$1,575.04 | \$1,526.08 | \$1,477.11 | \$1,428.15 | \$1,379.18 | \$1,330.22 | \$1,281.25 | \$1,232.29 | \$1,183.32 | \$1,134.36 |
| \$900,000.00 | \$1,737.00 | \$1,683.00 | \$1,629.00 | \$1,575.00 | \$1,521.00 | \$1,467.00 | \$1,413.00 | \$1,359.00 | \$1,305.00 | \$1,251.00 |
| \$1,000,000.00 | \$1,930.00 | \$1,870.00 | \$1,810.00 | \$1,750.00 | \$1,690.00 | \$1,630.00 | \$1,570.00 | \$1,510.00 | \$1,450.00 | \$1,390.00 |
| \$1,100,000.00 | \$2,123.00 | \$2,057.00 | \$1,991.00 | \$1,925.00 | \$1,859.00 | \$1,793.00 | \$1,727.00 | \$1,661.00 | \$1,595.00 | \$1,529.00 |
| \$1,200,000.00 | \$2,316.00 | \$2,244.00 | \$2,172.00 | \$2,100.00 | \$2,028.00 | \$1,956.00 | \$1,884.00 | \$1,812.00 | \$1,740.00 | \$1,668.00 |
| \$1,300,000.00 | \$2,509.00 | \$2,431.00 | \$2,353.00 | \$2,275.00 | \$2,197.00 | \$2,119.00 | \$2,041.00 | \$1,963.00 | \$1,885.00 | \$1,807.00 |
| \$1,400,000.00 | \$2,702.00 | \$2,618.00 | \$2,534.00 | \$2,450.00 | \$2,366.00 | \$2,282.00 | \$2,198.00 | \$2,114.00 | \$2,030.00 | \$1,946.00 |
| \$1,500,000.00 | \$2,895.00 | \$2,805.00 | \$2,715.00 | \$2,625.00 | \$2,535.00 | \$2,445.00 | \$2,355.00 | \$2,265.00 | \$2,175.00 | \$2,085.00 |
| \$1,600,000.00 | \$3,088.00 | \$2,992.00 | \$2,896.00 | \$2,800.00 | \$2,704.00 | \$2,608.00 | \$2,512.00 | \$2,416.00 | \$2,320.00 | \$2,224.00 |
| \$1,700,000.00 | \$3,281.00 | \$3,179.00 | \$3,077.00 | \$2,975.00 | \$2,873.00 | \$2,771.00 | \$2,669.00 | \$2,567.00 | \$2,465.00 | \$2,363.00 |
| \$1,800,000.00 | \$3,474.00 | \$3,366.00 | \$3,258.00 | \$3,150.00 | \$3,042.00 | \$2,934.00 | \$2,826.00 | \$2,718.00 | \$2,610.00 | \$2,502.00 |
| \$1,900,000.00 | \$3,667.00 | \$3,553.00 | \$3,439.00 | \$3,325.00 | \$3,211.00 | \$3,097.00 | \$2,983.00 | \$2,869.00 | \$2,755.00 | \$2,641.00 |
| \$2,000,000.00 | \$3,860.00 | \$3,740.00 | \$3,620.00 | \$3,500.00 | \$3,380.00 | \$3,260.00 | \$3,140.00 | \$3,020.00 | \$2,900.00 | \$2,780.00 |
| \$2,100,000.00 | \$4,053.00 | \$3,927.00 | \$3,801.00 | \$3,675.00 | \$3,549.00 | \$3,423.00 | \$3,297.00 | \$3,171.00 | \$3,045.00 | \$2,919.00 |
| \$2,200,000.00 | \$4,246.00 | \$4,114.00 | \$3,982.00 | \$3,850.00 | \$3,718.00 | \$3,586.00 | \$3,454.00 | \$3,322.00 | \$3,190.00 | \$3,058.00 |
| \$2,300,000.00 | \$4,439.00 | \$4,301.00 | \$4,163.00 | \$4,025.00 | \$3,887.00 | \$3,749.00 | \$3,611.00 | \$3,473.00 | \$3,335.00 | \$3,197.00 |
| \$2,400,000.00 | \$4,632.00 | \$4,488.00 | \$4,344.00 | \$4,200.00 | \$4,056.00 | \$3,912.00 | \$3,768.00 | \$3,624.00 | \$3,480.00 | \$3,336.00 |
| \$2,500,000.00 | \$4,825.00 | \$4,675.00 | \$4,525.00 | \$4,375.00 | \$4,225.00 | \$4,075.00 | \$3,925.00 | \$3,775.00 | \$3,625.00 | \$3,475.00 |

Tax Impact of Proposed School - Alternative format – Same project

| Project Cost Allocation & Financing | | | | | | Debt Service Impact | | | | \$ Tax Impact by House Valuation | | | | | |
|-------------------------------------|-----------------------------------|----------------|--|----------------------------------|----------------|---------------------|-----------------------|----------------|--|----------------------------------|--|--|--|--|--|
| | Project Cost Allocation with MSBA | % to Total | | Project Cost Allocation w/o MSBA | % to Total | Debt Service | | % to Total | | | | | | | |
| Hamilton | 60,967,225 | 42.85% | | 93,781,770 | 65.92% | Hamilton | \$ 89,301,824 | 65.92% | | | | | | | |
| Wenham | 31,519,463 | 22.16% | | 48,484,264 | 34.08% | Wenham | \$ 46,168,176 | 34.08% | | | | | | | |
| Sub - Total | 92,486,688 | 65.01% | | 142,266,034 | 100.00% | Sub - Total | \$ 135,470,000 | 100.00% | | | | | | | |
| State | 49,779,346 | 34.99% | | - | 0.00% | State | | | | | | | | | |
| Total | 142,266,034 | 100.00% | | 142,266,034 | 100.00% | Total | \$ 135,470,000 | 100.00% | | | | | | | |

| Financing - By Year & Component | | | | | | Tax Rate Impact of Debt Service | | | | | \$ Tax Impact by House Valuation | | | | | | | | |
|---------------------------------|------------------|----------------------|--------------|------------|----------------|---------------------------------|---------------------|--------------------|-------------------------------------|--------------------|----------------------------------|-------------------|-----------|-----------|-----------|-----------|-----------|----------|----------|
| Year | Balance Starting | Interest | Principal | Total | Ending Balance | Year | Annual Debt Service | Tax Rate Impact \$ | Annual Tax \$ | % of 2025 Tax Rate | Year | Annual Tax Impact | | | | | | | |
| 1 | 2028 | 60,967,225 | 2,743,525 | 3,048,361 | 5,791,886 | 57,918,864 | 1 | 2028 | \$ 5,791,886 | \$ 2.53 | \$ 2,016 | 16.1% | 1 | 2028 | \$ 1,263 | \$ 2,016 | \$ 2,526 | \$ 3,537 | \$ 5,052 |
| 2 | 2029 | 57,918,864 | 2,606,349 | 3,048,361 | 5,654,710 | 54,870,503 | 2 | 2029 | \$ 5,654,710 | \$ 2.47 | \$ 1,968 | 15.8% | 2 | 2029 | \$ 1,233 | \$ 1,968 | \$ 2,466 | \$ 3,453 | \$ 4,933 |
| 3 | 2030 | 54,870,503 | 2,469,173 | 3,048,361 | 5,517,534 | 51,822,141 | 3 | 2030 | \$ 5,517,534 | \$ 2.41 | \$ 1,920 | 15.4% | 3 | 2030 | \$ 1,203 | \$ 1,920 | \$ 2,407 | \$ 3,369 | \$ 4,813 |
| 4 | 2031 | 51,822,141 | 2,331,996 | 3,048,361 | 5,380,358 | 48,773,780 | 4 | 2031 | \$ 5,380,358 | \$ 2.35 | \$ 1,873 | 15.0% | 4 | 2031 | \$ 1,173 | \$ 1,873 | \$ 2,347 | \$ 3,285 | \$ 4,693 |
| 5 | 2032 | 48,773,780 | 2,194,820 | 3,048,361 | 5,243,181 | 45,725,419 | 5 | 2032 | \$ 5,243,181 | \$ 2.29 | \$ 1,825 | 14.6% | 5 | 2032 | \$ 1,143 | \$ 1,825 | \$ 2,287 | \$ 3,202 | \$ 4,574 |
| 6 | 2033 | 45,725,419 | 2,057,644 | 3,048,361 | 5,106,005 | 42,677,058 | 6 | 2033 | \$ 5,106,005 | \$ 2.23 | \$ 1,777 | 14.2% | 6 | 2033 | \$ 1,114 | \$ 1,777 | \$ 2,227 | \$ 3,118 | \$ 4,454 |
| 7 | 2034 | 42,677,058 | 1,920,468 | 3,048,361 | 4,968,829 | 39,628,696 | 7 | 2034 | \$ 4,968,829 | \$ 2.17 | \$ 1,729 | 13.8% | 7 | 2034 | \$ 1,084 | \$ 1,729 | \$ 2,167 | \$ 3,034 | \$ 4,334 |
| 8 | 2035 | 39,628,696 | 1,783,291 | 3,048,361 | 4,831,653 | 36,580,335 | 8 | 2035 | \$ 4,831,653 | \$ 2.11 | \$ 1,682 | 13.5% | 8 | 2035 | \$ 1,054 | \$ 1,682 | \$ 2,107 | \$ 2,950 | \$ 4,215 |
| 9 | 2036 | 36,580,335 | 1,646,115 | 3,048,361 | 4,694,476 | 33,531,974 | 9 | 2036 | \$ 4,694,476 | \$ 2.05 | \$ 1,634 | 13.1% | 9 | 2036 | \$ 1,024 | \$ 1,634 | \$ 2,048 | \$ 2,867 | \$ 4,095 |
| 10 | 2037 | 33,531,974 | 1,508,939 | 3,048,361 | 4,557,300 | 30,483,613 | 10 | 2037 | \$ 4,557,300 | \$ 1.99 | \$ 1,586 | 12.7% | 10 | 2037 | \$ 994 | \$ 1,586 | \$ 1,988 | \$ 2,783 | \$ 3,975 |
| 11 | 2038 | 30,483,613 | 1,371,763 | 3,048,361 | 4,420,124 | 27,435,251 | 11 | 2038 | \$ 4,420,124 | \$ 1.93 | \$ 1,538 | 12.3% | 11 | 2038 | \$ 964 | \$ 1,538 | \$ 1,928 | \$ 2,699 | \$ 3,856 |
| 12 | 2039 | 27,435,251 | 1,234,586 | 3,048,361 | 4,282,948 | 24,386,890 | 12 | 2039 | \$ 4,282,948 | \$ 1.87 | \$ 1,491 | 11.9% | 12 | 2039 | \$ 934 | \$ 1,491 | \$ 1,868 | \$ 2,615 | \$ 3,736 |
| 13 | 2040 | 24,386,890 | 1,097,410 | 3,048,361 | 4,145,771 | 21,338,529 | 13 | 2040 | \$ 4,145,771 | \$ 1.81 | \$ 1,443 | 11.6% | 13 | 2040 | \$ 904 | \$ 1,443 | \$ 1,808 | \$ 2,532 | \$ 3,616 |
| 14 | 2041 | 21,338,529 | 960,234 | 3,048,361 | 4,008,595 | 18,290,168 | 14 | 2041 | \$ 4,008,595 | \$ 1.75 | \$ 1,395 | 11.2% | 14 | 2041 | \$ 874 | \$ 1,395 | \$ 1,748 | \$ 2,448 | \$ 3,497 |
| 15 | 2042 | 18,290,168 | 823,058 | 3,048,361 | 3,871,419 | 15,241,806 | 15 | 2042 | \$ 3,871,419 | \$ 1.69 | \$ 1,347 | 10.8% | 15 | 2042 | \$ 844 | \$ 1,347 | \$ 1,689 | \$ 2,364 | \$ 3,377 |
| 16 | 2043 | 15,241,806 | 685,881 | 3,048,361 | 3,734,243 | 12,193,445 | 16 | 2043 | \$ 3,734,243 | \$ 1.63 | \$ 1,300 | 10.4% | 16 | 2043 | \$ 814 | \$ 1,300 | \$ 1,629 | \$ 2,280 | \$ 3,257 |
| 17 | 2044 | 12,193,445 | 548,705 | 3,048,361 | 3,597,066 | 9,145,064 | 17 | 2044 | \$ 3,597,066 | \$ 1.57 | \$ 1,252 | 10.0% | 17 | 2044 | \$ 784 | \$ 1,252 | \$ 1,569 | \$ 2,196 | \$ 3,138 |
| 18 | 2045 | 9,145,064 | 411,529 | 3,048,361 | 3,459,890 | 6,096,723 | 18 | 2045 | \$ 3,459,890 | \$ 1.51 | \$ 1,204 | 9.6% | 18 | 2045 | \$ 755 | \$ 1,204 | \$ 1,509 | \$ 2,113 | \$ 3,018 |
| 19 | 2046 | 6,096,723 | 274,353 | 3,048,361 | 3,322,714 | 3,048,361 | 19 | 2046 | \$ 3,322,714 | \$ 1.45 | \$ 1,156 | 9.3% | 19 | 2046 | \$ 725 | \$ 1,156 | \$ 1,449 | \$ 2,029 | \$ 2,898 |
| 20 | 2047 | 3,048,361 | 137,176 | 3,048,361 | 3,185,538 | - | 20 | 2047 | \$ 3,185,538 | \$ 1.39 | \$ 1,109 | 8.9% | 20 | 2047 | \$ 695 | \$ 1,109 | \$ 1,389 | \$ 1,945 | \$ 2,779 |
| Total | | 28,807,014 | 60,967,225 | 89,774,239 | | | Total | \$ 89,774,239 | \$ 31,247 | | | Total | \$ 19,578 | \$ 31,247 | \$ 39,156 | \$ 54,819 | \$ 78,312 | | |
| Average | | 1,440,351 | 3,048,361 | 4,488,712 | | | Average | \$ 4,488,712 | \$ 1.96 | \$ 1,562 | 12.5% | Average | \$ 979 | \$ 1,562 | \$ 1,958 | \$ 2,741 | \$ 3,916 | | |
| | | Interest Rate | 4.50% | | | | | | FY 2025 Tax Rate per \$1,000 | | | | | | | | | | |
| | | | | | | | | | \$ 15.65 | | | | | | | | | | |

Selection of the “Combined School “Program

April 2024 - The School Building Committee (SBC) voted to recommend a “Combined” elementary school project (C3.4). At the time of this decision there were five options under consideration:

| | Project | Survey | Total Cost (\$ Mil) | # of Students | % of Elementary Students | Net Cost per Student (\$ Thous.) | Sq Ft per Student |
|-------------|--------------|----------|---------------------|---------------|--------------------------|----------------------------------|-------------------|
| C1.0 | Code Upgrade | | \$46 | 285 | 34% | \$149 | 161 |
| C2.1 | Add / Reno | X | \$115 | 285 | 34% | \$269 | 295 |
| C3.1 | New | X | \$106 | 285 | 34% | \$249 | 295 |
| C3.3 | New | | \$142 | 645 | ~ 90% | \$147 | 200 |
| C3.4 | New | X | \$151 | 740 | 100% | \$136 | 172 |

June 2024 - In advance of a vote by the School Committee (SC) on the SBC recommendation, the SC sponsored a survey of 300 taxpayers in Hamilton and Wenham. This survey asked respondents to vote for one of three options (Noted above). The option with the largest positive vote was to replace the Cutler School (C3.1) at a cost of \$106 Million. While the positive vote was 112 to 91 in favor, the SC decided to go with the option that provided a new facility for 100% of the Grade 1-5 elementary school population. This population represents 41% of the total students in the District. This option possessed the **lowest cost per student at \$136k and square feet per student of 172.**

The SBC and the SC both felt that investing in a new school building with a capacity of only 285 students at a cost per student of \$249K was not a sound financial decision for the towns or an equitable one for the students of the District. The consolidated option removes two old school buildings from future capital investment. In the same vein, the “Add/Reno” project for the same student population was not deemed a sound decision as it did not align with the expanded space and functional desires contained in the Educational Plan design.

FYI - The charts below provide the current student population by grade and school.

| Enrollment by Grade (2024-25) | | | | | | | | | | | | | | | | |
|---|----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|----|-------|
| | PK | K | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | SP | Total |
| Bessie Buker Elementary | 0 | 38 | 39 | 40 | 64 | 39 | 35 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 255 |
| Cutler School | 0 | 33 | 57 | 38 | 44 | 34 | 40 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 246 |
| Hamilton-Wenham Regional High | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 117 | 116 | 107 | 108 | 0 | 448 |
| Miles River Middle | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 135 | 136 | 120 | 0 | 0 | 0 | 0 | 0 | 391 |
| Winthrop School | 31 | 46 | 40 | 60 | 45 | 59 | 48 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 329 |
| District | 31 | 117 | 136 | 138 | 153 | 132 | 123 | 135 | 136 | 120 | 117 | 116 | 107 | 108 | 0 | 1,669 |

| School | Grade 1-5 | | All Other | | Total Students | |
|--------------|------------|---------------|------------|---------------|----------------|-------------|
| | # | % to Total | # | % to Total | # | % to Total |
| Buker | 217 | 31.8% | 38 | 3.9% | 255 | 15.3% |
| Cutler | 213 | 31.2% | 33 | 3.3% | 246 | 14.7% |
| High School | - | - | 448 | 45.4% | 448 | 26.9% |
| Miles River | - | - | 391 | 39.6% | 391 | 23.4% |
| Winthrop | 252 | 37.0% | 77 | 7.8% | 329 | 19.7% |
| Total | 682 | 100.0% | 987 | 100.0% | 1,669 | 100% |
| | 41% | | 59% | | 100% | |

One School vs Two New Schools - 10 Years Apart (June 2024 Fincom Discussion)

As discussed above: **Alternative proposals to the proposed school project (two new schools, renovation, delay, etc.) will simply cost the School District more in the long-run.** The most vivid example of this is a scenario to build two new schools, the 2nd school built 10 years after the 1st school. In this scenario, both schools would follow the design which aligns with the Educational Plan adopted by the District.

One New School vs. Two New Schools – PDP Costs

The building cost data used for this analysis was based on the 12/20/23 "Revision 1" Version of the "PDP Cost Comparative Analysis" supplied by JCJ Architecture..

Option #1: One School:

New Consolidated Cutler and Winthrop Elementary School

Students: 740 Students

Square footage: 127,298

- Per Student: 172

Cost

- Total* \$ 142M
- Construction \$ 108M Per Sq Ft \$852
- Non-Construction \$ 34M
- Per Student (Gross) \$192 thous.

* Total Cost is 129% of Construction Cost

Option #2: Two Schools:

Construct: New Cutler School in 2028 - 285 Students

Construct: New Winthrop School in 2038 - 430 Students

Students: - 715 Students

Square footage: 178,247

- Per Student: 249

Cost

- Total* \$ 228M
- Construction \$ 178M Per Sq Ft \$1,001
- Non-Construction \$ 50M
- Per Student \$319 thous.

* Total Cost is 128% of Construction Cost

Difference \$86M

Hamilton-Wenham Elementary School Project School Building Committee Meeting 12/18/2023
12/20/2023 Revision 1 : PDP Comparative Cost Estimate Exhibit

Cutler Site Options - Comparative PDP Estimates

| Enrollment | S/SF | Base Repair/Code Upgrade | Renovation | Addition/ Renovations | | | | New Construction | | | |
|--------------|------|--------------------------|------------|-----------------------|---------------|---------------|---------------|---------------------|---------------|---------------|---------------|
| | | C1.0 | N/A | C2.1 | C2.2 | C2.3 | C2.4 | C3.1 | C3.2 | C3.3 | C3.4 |
| 285 Students | | \$749.54 | | \$888.14 | \$873.30 | \$813.11 | \$428.27 | \$855.88 | \$840.88 | \$798.90 | \$795.94 |
| | | \$54,145,732 | X | \$74,555,273 | | | | \$71,846,646 | | | |
| | | \$44,826,486 | | \$98,526,718 | | | | \$92,125,634 | | | |
| 430 Students | | | X | | \$82,353,841 | | | | \$79,296,283 | | |
| | | | | | \$109,092,339 | | | | \$161,908,972 | | |
| 645 Students | | | X | | | \$107,161,878 | | | | \$103,009,377 | |
| | | | | | | \$142,996,285 | | | | \$182,527,828 | |
| 740 Students | | | X | | | | \$112,471,083 | | | | \$108,081,033 |
| | | | | | | | \$149,263,361 | | | | \$189,180,574 |

Winthrop Site Options - Comparative PDP Estimates

| Enrollment | S/SF | Base Repair/Code Upgrade | Renovation | Addition/ Renovations | | | New Construction | | | |
|--------------|------|--------------------------|------------|-----------------------|---------------|---------------|------------------|---------------|---------------|---------------|
| | | N/A | N/A | W2.2 | W2.3 | W2.4 | W3.2 | W3.3 | W3.4 | |
| 285 Students | | | X | | \$889.09 | \$840.91 | \$838.33 | \$903.85 | \$851.75 | \$848.58 |
| | | | | | | | | | | |
| 430 Students | | | X | X | \$83,843,174 | | | \$85,234,638 | | |
| | | | | | \$113,046,344 | | | \$109,462,560 | | |
| 645 Students | | | X | X | | \$308,432,225 | | | \$109,823,691 | |
| | | | | | | \$143,762,979 | | | \$141,195,635 | |
| 740 Students | | | X | X | | | \$113,837,998 | | | \$115,229,464 |
| | | | | | | | \$151,056,733 | | | \$148,273,178 |



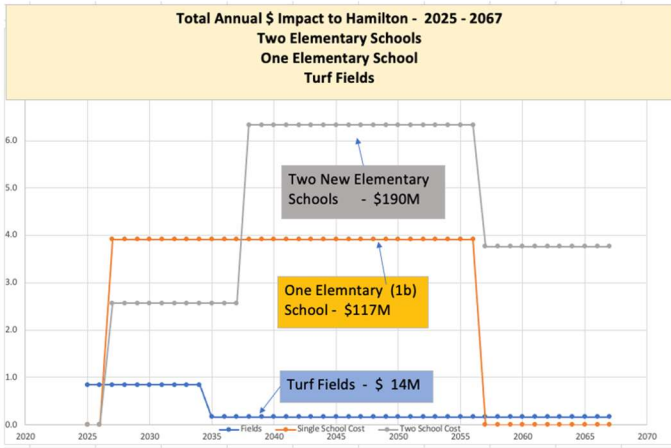
One New School vs. Two New Schools

The data used for this analysis was based on the 12/20/23 "Revision 1" Version of the "PDP Cost Comparative Analysis" supplied by JCI Architecture..

| School Site | # of Students | Element | Two Schools - ([10 Years Apart | | | | #1 - 2028 (Cutler) & #2 - 2038 (Winthrop)] | | | |
|---------------|------------------|-------------------------|----------------------------------|-----------|-----------|------------|---|------------------|----------------------------------|------------------------|
| | | | New Construction | | | | New Construction | New Construction | Cost escalation (10 Years later) | Two Schools Two Phases |
| | | Construction Cost \$/SF | \$ 855.88 | \$ 840.88 | \$ 798.90 | \$ 795.94 | \$ 855.88 | \$ 840.88 | \$ 855.88 | |
| | | | C3.1 | C3.2 | C3.3 | C3.4 | C3.1 | | | |
| Cutler | 285 | Construction Cost (CC) | \$ 71,846,646 | | | | \$ 71,846,646 | | \$ 71,846,646 | 285 |
| | | Total Project Cost (PC) | \$ 92,125,634 | | | | \$ 92,125,634 | | \$ 92,125,634 | |
| | | Ratio PC / CC | 128% | | | | 128% | | 128% | |
| | | Gross Floor Area | 83,945 | | | | 83,945 | | 83,945 | |
| | | Implied Sq Ft/Student | 295 | | | | 295 | | 295 | |
| | Cost Per Student | \$ 323,248 | | | | \$ 323,248 | | \$ 323,248 | | |
| | | Construction Cost \$/SF | \$ 903.85 | | | | \$ 903.85 | \$ 225.96 | \$ 1,129.81 | |
| | | | W3.2 | W3.3 | W3.4 | W3.2 | 25% | | | |
| Winthrop | 430 | Construction Cost (CC) | \$ 85,234,638 | | | | \$ 85,234,638 | \$ 21,308,716 | \$ 106,543,354 | 430 |
| | | Total Project Cost (PC) | \$ 109,462,560 | | | | \$ 109,462,560 | \$ 27,365,712 | \$ 136,828,272 | |
| | | Ratio PC / CC | 128% | | | | 128% | 128% | 128% | |
| | | Gross Floor Area | 94,302 | | | | 94,302 | | 94,302 | |
| | | Implied Sq Ft/Student | 219 | | | | 219 | | 219 | |
| | Cost Per Student | \$ 254,564 | | | | \$ 254,564 | \$ 63,641 | \$ 318,205 | | |
| | | Construction Cost \$/SF | | | | | \$ 840.88 | \$ 225.96 | \$ 1,000.80 | |
| Two - Schools | 715 | Construction Cost (CC) | | | | | | | \$ 178,390,000 | 715 |
| | | Total Project Cost (PC) | | | | | | | \$ 228,953,906 | |
| | | Ratio PC / CC | | | | | | | 128% | |
| | | Gross Floor Area | | | | | | | 178,247 | |
| | | Implied Sq Ft/Student | | | | | | | 249 | |
| | Cost Per Student | | | | | | | \$ 320,215 | | |

Hamilton Cost: One New School vs. Two New Schools

Hamilton Out of pocket cost estimate:
 If two schools were built....10 years apart..... the cost increase over building one school is \$73M over the 40 year time horizon.



| Year | Fields | | | Total Hamilton Annual Cost | Single School Hamilton Annual Cost | Two Schools | | Total Annual Cost | |
|------|--------------------|--------------|-------|----------------------------|------------------------------------|--------------------------------|--------------------------------|-------------------|-------|
| | Original Construct | Replace Turf | Total | | | School #1 Hamilton Annual Cost | School #2 Hamilton Annual Cost | | |
| 1 | 2025 | 1 | 0.84 | 0.84 | | | | 0.0 | |
| 2 | 2026 | 2 | 0.84 | 0.84 | | | | 0.0 | |
| 3 | 2027 | 3 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 4 | 2028 | 4 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 5 | 2029 | 5 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 6 | 2030 | 6 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 7 | 2031 | 7 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 8 | 2032 | 8 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 9 | 2033 | 9 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 10 | 2034 | 10 | 0.84 | 0.84 | 3.91 | 2.57 | 2.6 | 2.6 | |
| 11 | 2035 | | 1 | 0.17 | 0.17 | 3.91 | 2.57 | 2.6 | |
| 12 | 2036 | | 2 | 0.17 | 0.17 | 3.91 | 2.57 | 2.6 | |
| 13 | 2037 | | 3 | 0.17 | 0.17 | 3.91 | 2.57 | 2.6 | |
| 14 | 2038 | | 4 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 15 | 2039 | | 5 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 16 | 2040 | | 6 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 17 | 2041 | | 7 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 18 | 2042 | | 8 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 19 | 2043 | | 9 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 20 | 2044 | | 10 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 21 | 2045 | | 1 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 22 | 2046 | | 2 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 23 | 2047 | | 3 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 24 | 2048 | | 4 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 25 | 2049 | | 5 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 26 | 2050 | | 6 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 27 | 2051 | | 7 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 28 | 2052 | | 8 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 29 | 2053 | | 9 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 30 | 2054 | | 10 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 31 | 2055 | | 1 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 32 | 2056 | | 2 | 0.17 | 0.17 | 3.91 | 2.57 | 3.76 | |
| 33 | 2057 | | 3 | 0.17 | 0.17 | | | 3.76 | |
| 34 | 2058 | | 4 | 0.17 | 0.17 | | | 3.76 | |
| 35 | 2059 | | 5 | 0.17 | 0.17 | | | 3.76 | |
| 36 | 2060 | | 6 | 0.17 | 0.17 | | | 3.76 | |
| 37 | 2061 | | 7 | 0.17 | 0.17 | | | 3.76 | |
| 38 | 2062 | | 8 | 0.17 | 0.17 | | | 3.76 | |
| 39 | 2063 | | 9 | 0.17 | 0.17 | | | 3.76 | |
| 40 | 2064 | | 10 | 0.17 | 0.17 | | | 3.76 | |
| 41 | 2065 | | | 0.17 | 0.17 | | | 3.76 | |
| 42 | 2066 | | | 0.17 | 0.17 | | | 3.76 | |
| 43 | 2067 | | | 0.17 | 0.17 | | | 3.76 | |
| | | | 8.4 | 5.5 | 13.0 | 117.4 | 77.6 | 112.9 | 189.9 |

Return on Investment – School Facilities

In February 2025, the District secured approval from the MSBA for the “Combined” School to be built on the Cutler School site. The details of the project which was approved by the MSBA appear below:

| # | Project | Total Cost (\$ Mils) | MSBA Contribution (\$ Mils) | # of Students | % of Elementary Students Gr 1-5 | Net Cost per Student (\$ Thous) | Sq Ft per Student |
|------|---------|----------------------|-----------------------------|---------------|---------------------------------|---------------------------------|-------------------|
| C3.4 | New | \$142 | \$49 | 740 | 100% | \$124 | 172 |

This \$49M reimbursement from the MSBA includes a “Maintenance Incentive” of ~ \$1.6 Million which recognizes MSBA’s award to the HWRSD of 1.76 points out of a possible 2.0 points. Simple math indicates a score of 1.76 / 2.0 equates to a grade of 88%. FINCOM’s assessment of this award is that the MSBA assessed HWRSD as operating with “**best maintenance practices**” as evidenced by the \$1.6Million award.

| Comparisons: | MSBA - Approved Projects | | HW School Building Committee Options | | | | | Apr '25 ATM Preferred Option |
|--------------------------------|--------------------------|-------------------------|--------------------------------------|-----------------|-------------|-------------|-------------|------------------------------|
| | 10 Projects 10/22 ATM | Average 4 MSBA Projects | C1.0 Code Upgrade | C2.1 Add / Reno | C3.1 New | C3.3 New | C3.4 New | |
| School Project Cost (Millions) | \$ 85 | \$ 107 | \$ 46 | \$ 115 | \$ 106 | \$ 142 | \$ 151 | \$ 142 |
| Enrollment | 652.5 | 550 | 285 | 285 | 285 | 645 | 740 | 740 |
| Cost per Student | 0 | | | | | | | |
| Gross | \$ 130,599 | \$ 195,233 | \$ 159,958 | \$ 403,941 | \$ 373,223 | \$ 220,734 | \$ 203,832 | \$ 192,251 |
| Net | \$ 82,543 | \$ 115,454 | \$ 148,760 | \$ 269,263 | \$ 248,787 | \$ 147,139 | \$ 135,872 | \$ 124,982 |
| Gross Square Feet | 119,627 | 101,941 | 45,800 | 83,945 | 83,945 | 128,939 | 127,298 | 127,298 |
| Total Sq. Ft per Student | 183 | 185 | 161 | 295 | 295 | 200 | 172 | 172 |
| Gross Square Feet | 119,627 | 101,941 | 45,800 | 83,945 | 83,945 | 128,939 | 127,298 | 127,298 |
| Construction Cost | 67,276,105 | 85,914,072 | 35,435,298 | 89,484,891 | 82,679,868 | 110,666,365 | 117,244,050 | 108,493,509 |
| Construction Cost Per SF | 562 | 843 | 774 | 1,066 | 985 | 858 | 921 | 852 |
| Total Project | 85,216,070 | 107,378,392 | 45,587,892 | 115,123,275 | 106,368,540 | 142,373,470 | 150,835,732 | 142,266,034 |
| Total Cost Per SF | 712 | 1,053 | 995 | 1,371 | 1,267 | 1,104 | 1,185 | 1,118 |

As we review the current proposed project, we pulled together some thoughts regarding return on investment of the forgoing.

- The SBC received \$1.25M from the school District / two towns to fund the Feasibility study. The outcome was the \$49M award from the MSBA. This award allowed Hamilton’s share of the project to drop to \$61M.
- The value of the \$49M award to the HWRSD cannot be overstated. If we were to delay/defer utilization of this award, the value would decline by \$6.7M after 3 years, by \$14M after 7 years and by \$19M after 10 years (Using a 5% discount rate). This is simply the effect of the time value of money at work. The point here

is a delay in starting this project will create a significant “lost opportunity” cost when considering the MSBA reimbursement of \$49M.

- The consolidated proposal provides an additional return in **cost avoidance of capital expenditures of the existing Cutler and Winthrop schools**. In the April 2024 Annual Town Meeting Capital review, which appears above, we noted that this point in footnote #3. This cost avoidance amounts to \$9.4M. If we combine, this cost avoidance of \$9.4M with the \$49M reimbursement amount we see the “financial value” to the District totals to \$58M.
- The consolidation provides a new facility for 100% of the Grade 1-5 students in the District rather than for 31% of the population in the existing Cutler School.
- A significant amount of recent focus has been on renovation and remodeling of the Cutler school. The question on the table is if we wanted to remodel the building how much would it cost, and would the District be eligible for reimbursements? There is no doubt that if the voters decide to not invest in the new consolidated school building, the School District would pursue any/all available reimbursement from MSBA. FINCOM feels that investing tens of millions of dollars in a 70-year-old building is not a preferred route. This point-of-view is sourced from the MSBA and their desire to support retiring the Cutler school (as well as consolidating the Winthrop building). We feel that retiring the Cutler building at this time makes the most financial sense for the District.
- During the 2024 ATM and on the ATM Capital exhibit (see above) we mentioned a discussion regarding the sale and potential development of one of the school sites. FINCOM created a scenario of such a sale and a thoughtful development of the Winthrop school site. This was NOT a “3A” scenario but rather a mixed-use development. Such a scenario would yield a tax revenue stream of ~ \$500k per year.
- The chart below provides a summary of the discussion above:

| Investment | \$ | Return on Investment Outcome | Comments |
|--|---------|--|---|
| Consolidated School - Feasibility Study | \$1.25M | \$49M (Includes \$1.6M in “Maintenance” incentives) | The SBC worked for two years...within the MSBA program and constructed a program which secured a \$49 reimbursement |

| | | | |
|--|----------------------------------|---|---|
| Consolidated School - School Building | \$92M | New school for 100% of elementary aged students with a 70-year life Avoidance of \$9.4M in capital spending at Cutler & Winthrop | In 2024, the HWRSD listed \$9.4M of capital in elementary school repairs which would be avoided. |
| Renovation / Remodel Existing Schools | \$50M \$100M ?? | Existing schools with upgraded systems / windows / other features improvements. | Is it wise to make an investment of tens of millions of \$\$\$ in 60 - 70-year-old buildings? |

Appendix - Important Topics / Questions Addressed over the past 24 months

FINCOMs Role in the School Building Committee

As a point of information, we wanted to disclose that the Chairperson of the Hamilton FINCOM has participated in the School Building Committee (SBC) as a “Non-Voting” member. This role was performed by both the current and former chairperson. Elements of that participation have been to: 1) ask clarifying questions, 2) bring concerns from the community into the committee to ensure attention and follow-up, 3) advise on approach 4) secure a detailed understanding of the school project and 5) to deliver financial perspective/information to the voting committee members.

Maintenance of Buildings

School Districts that have been invited into the MSBA capital pipeline after the Statement of Interest phase is complete must submit a Maintenance and Capital Planning (MCP) Record using the MSBA web-based Maintenance and Capital Planning System. This information is used to facilitate the MSBA’s assessment of the District’s maintenance and capital planning practices pursuant to state statute.

The Maintenance and Capital Planning information provided by the District to the MSBA is a threshold requirement for MSBA funding and can account for up to two additional points of reimbursement for eligible projects. This scoring methodology is consistent with the goals and priorities of the state statutes and regulations under which the MSBA operates. This scoring methodology:

- rewards school Districts that perform all the best practices well,
- calculates average scores for those that undertake most of the best practices and
- results in a low score for Districts that only do some of the best practices and have average or below average performance.

The MSBA awarded the HWRSD 1.76 points out of 2.0 points in this assessment. Simple math might indicate a score of 1.76/2.0 equates to a grade of 88%. This score equates to a reimbursement from the MSBA of \$1.6 Million (included in the \$49 Million reimbursement approved by the MSBA).

Our assessment of this award is that the MSBA assessed that the HWRSD operates in the “best practices” category as evidenced by the \$1.6Million award.

Large School vs. Small School

There has been a vigorous conversation in the community regarding the subject of large schools or small schools being better for students. The School Building Committee, including the building designers and educators, engaged deeply on this topic. One outcome of those deliberations is highlighted by the creation of “Learning Neighborhoods” in the proposed building. The concept is clearly evidenced in the building construction whereby a single grade of students coexists in a single area (neighborhood) of the school for over 85% of their day. It appears these “learning neighborhoods” include age-appropriate environments, flexible classrooms and collaborative spaces which allow students to learn in dynamic environments that support different learning styles and group work.

Follow-Up to regarding “Underground Water” at the Cutler Site

A Hamilton taxpayer requested the School Building Committee to follow-up on commentary regarding a potential “Underground Stream” on the Cutler property. The JCJ Architecture team reached-out to Samiotes Consultants, Inc a Civil Engineering and Land Surveying firm to pursue this topic. The 9/3/24 response from JCJ regarding this inquiry conveys there is no mention or evidence of any wetland hydrologic connection within or immediately adjacent to the Cutler site.

Use of Excess and Deficiency / Free Cash to Cover Operating Costs

Excess and Deficiency (E&D) and Free Cash are **generated from unused operating funds for the prior year**. At the end of each fiscal year, the school District (E&D) and the town (Free Cash), typically underspend their operating budgets. These budgeted but unspent operating funds are clearly identified, segregated and certified. These amounts are discussed during budget presentations in the 1) School Finance “Quintuple Board

Committee meetings and 2) Town budget discussions. Approval to utilize these funds is included as part of the Annual Town Meeting warrant process.

In recent years, the school District has returned E&D expenses to both towns in the form of an operating expense credit.

Note: The School E&D amounts are clearly identified in both state (DESE) reports, and HWRSD audited financial statements.

| Excess & Deficiency Usage FY '23 - FY'26 | FY23 Actuals | FY24 Actuals | FY25 Budget | FY26 Budget |
|---|-------------------------|-------------------------|------------------------|------------------------|
| | | | | |
| Returned to Towns | 775 | 773 | 773 | 2,088 |
| Offset by Expenses | 2,325 | 2,399 | 1,529 | |
| Total | 3,100 | 3,172 | 2,302 | 2,088 |

Note: In October 2022, Hamilton stated a preference to have the District return unspent funds to the town, rather than retain them in a Stabilization fund.

What if there is a 2 ½ Operational Override occurs in FY '27 budget or beyond?

In the FY '26 budget, Hamilton continued to achieve its goal to avoid an operational override. This goal is obviously clearly desired by our taxpayers but will not always be achieved. The FINCOM applauds Town Management for this accomplishment.

Each year, the towns and the school District work collaboratively to manage the costs being expressed in each of the three budgets. **This year, the school District was tasked with absorbing the impact of the new staff contracts and collectively the towns and the District managed to a successful outcome.** This involved usage of Excess and Deficiency and Free Cash. Hamilton was able to fund some budget line items via free Cash without impairing any stabilization funds or reserves.

A question was raised during budget discussions about usage of Free Cash and E&D and might it mask a potential override in the future. While that point is valid to consider, the transparent and collaborative budgeting process employed by the two towns and the school District will allow for clarity is the spending dynamics in effect in Hamilton and the HWRSD.

To take this discussion a bit further, the question remains, with the consolidated school override in front of voters at this ATM, how much could an override add to a tax bill in 2027 and beyond, if either the town or the District puts forth an override. The chart

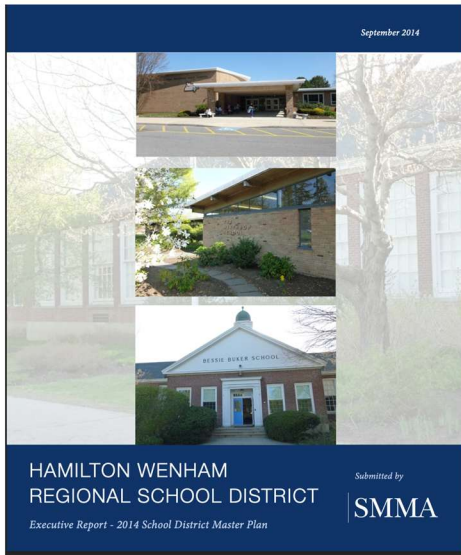
below provides some granularity into the potential annual \$ impact of a District override from \$1M - 3M.

| School Override | Hamilton Portion | Rate | \$ |
|-----------------|------------------|---------|--------|
| 100% | 66% | | |
| \$ 1,000,000 | \$ 660,000 | \$ 0.29 | \$ 235 |
| \$ 2,000,000 | \$ 1,320,000 | \$ 0.58 | \$ 470 |
| \$ 3,000,000 | \$ 1,980,000 | \$ 0.86 | \$ 705 |

Given the cost dynamics in the U.S. economy: inflation, tariffs, construction cost, we are seeing increased cost pressure and hence the probability we may encounter an operational override in the near term is heightened.

2014 HWRSD Master Plan recommendation – A Single Consolidated School

2014 HWRSD Master Plan



Option 3E: One New School
 If the district were interested in the most cost effective capital construction project, a single school (population 728 students) is the least expensive. This option presents numerous obstacles including:

- Where to locate the school - The Writthrop site flat and the largest of the three school sites is the most likely choice for a single school
- This also violates the spirit of the Regional District Agreement

If the district were interested in the most cost effective construction project, a single school (population 728 students) is the least expensive

SMMA

| | 2023 - 2024 Reported Population | Avg (sqft) | Construction Cost* | Project Cost (x 1.25) | MSEA Participation Cost to Town** | Comments |
|---|---------------------------------------|--------------|-----------------------|--------------------------|--|---|
| D. Elementary Schools | | | | | | |
| A. 3 Existing Schools - 5 Year Plan | | | | | | |
| Baker School | 218 | 46,330 | \$700,000 | \$875,000 | \$275,000 | Assumes No MSEA Participation |
| Reopen: up-grade if required | | 46,330 | \$300,000 | \$375,000 | \$275,000 | Assumes No MSEA Participation |
| Cutter School | 250 | 44,455 | \$600,000 | \$750,000 | \$750,000 | Assumes No MSEA Participation |
| Reopen: up-grade if required | | 44,455 | \$300,000 | \$375,000 | \$275,000 | Assumes No MSEA Participation |
| Writthrop School | 260 | 48,000 | \$600,000 | \$750,000 | \$750,000 | Assumes No MSEA Participation |
| Reopen: up-grade if required | | 48,000 | \$300,000 | \$375,000 | \$275,000 | Assumes No MSEA Participation |
| Total | 728 | | | | \$2,000,000 | |
| B. 3 Existing Schools - Comprehensive renovations | | | | | | |
| Baker School | 218 | 46,330 | \$17,000,000 | \$21,250,000 | \$12,112,500 | Additional space changes, comprehensive renovations |
| Cutter School | 250 | 44,455 | \$17,000,000 | \$21,250,000 | \$12,112,500 | Additional space changes, comprehensive renovations |
| Writthrop School | 260 | 48,000 | \$17,000,000 | \$21,250,000 | \$12,112,500 | Additional space changes, comprehensive renovations |
| Total | 728 | | \$51,000,000 | \$63,750,000 | \$34,337,500 | |
| Note: if seismic upgrades are not required for Option A, total reported population is 691,115. Option B | | | | | | |
| C. Two Schools of equal size | | | | | | |
| 364 | 62,800 | \$20,000,000 | \$25,000,000 | \$14,387,500 | | |
| 364 | 62,800 | \$20,000,000 | \$25,000,000 | \$14,387,500 | | |
| Total | 728 | | \$40,000,000 | \$50,000,000 | \$28,775,000 | Save \$33 M |
| D. One New School | | | | | | |
| 728 | 105,560 | \$18,000,000 | \$22,500,000 | \$13,687,500 | | |

ATM Financial Discussion

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Ipswich Consolidated School Use Case

In May 2018, the Town of Ipswich proposed a building a new Consolidated Winthrop and Doyon School. The proposal was to combine both schools into one PK-5 for all Ipswich students. The school was intended to build on the Doyon site, tear down the old Doyon and build fields/parking. The profile of the 2018 proposal:

- Students: 775
- Square footage: 123,535
- Total Project Cost: \$69,406,719
- Maximum grant: \$26,287,436
- District Share: \$43,400,672
- Reimbursement rate (2018) 49%
- Median Household: \$414,000
- Vote failed on May 23, 2018

On December 2024 - The MSBA invited Ipswich back into the Eligibility Phase: Eligibility runs 270 days

- Assume PDP, PSR, SD takes 2 years
- Construction Documents and bidding: 1 year
- Potential new school start approximately 2030
- Assumption: Go to MSBA for PSB in 2028/2029
- Next two years cost escalation between 3-4% with threat of tariffs,
- assume 4-5% for years up to 2030
- Same school = \$170-180M would be conservative estimate

Sample Calculation which Illustrates Valuation / Tax Impact and Override Costs

Sample Housing Valuation / Tax Impact

All amounts listed are estimates

| | |
|--|-------------|
| Year Built: | 1983 |
| Valuation | |
| Original Cost: | \$ 100,000 |
| Investments over time: | \$ 250,000 |
| Cost Basis | \$ 350,000 |
| Current Assessed Value | \$ 979,600 |
| Increase in valuation above investments: | \$ 629,600 |

In the event an override emerges from the school district in FY'27 or later, due to operating costs, the annual tax \$ impact can be derived from the table below:

| School Override | Hamilton Portion | Rate | \$ |
|-----------------|------------------|---------|--------|
| 100% | 66% | | |
| \$ 1,000,000 | \$ 660,000 | \$ 0.29 | \$ 235 |
| \$ 2,000,000 | \$ 1,320,000 | \$ 0.58 | \$ 470 |
| \$ 3,000,000 | \$ 1,980,000 | \$ 0.86 | \$ 705 |

| | | |
|-----------------------------------|-------------------------|-----------|
| Tax | | |
| Current Annual Tax Bill: | (@ \$15.65 per \$1,000) | \$ 15,330 |
| Year 1 "School" tax Impact: | | \$ 2,500 |
| Year 1 Tax Bill: | | \$ 17,830 |
| Tax Cost of New School – 20 Years | @ \$1.95 for 20 years | \$ 38,204 |

According to the National Bureau of Economic Research, there is a strong correlation between school expenditures and home values. A report titled "School Spending Raises Property Values" found that **for every dollar spent on public schools in an area, home values increased by \$20.**

Research consistently shows that **increased spending on school facilities significantly impacts housing valuations**, with homes located in districts with higher school facility investments generally commanding higher prices due to the perceived value of quality education for potential buyers, particularly those with children; essentially, every dollar spent on school facilities can lead to a substantial increase in property value within that area, with studies often citing a figure around \$20 per dollar of school spending. [↗](#)

Key points about the relationship between school facilities spending and housing valuations:

Higher perceived quality:
When a school district invests in modern facilities, it is often seen as a sign of high-quality education, attracting families willing to pay more for homes within that district. [↗](#)

Demand driver:
Parents with children often prioritize access to good schools when choosing a home, leading to increased demand for properties in well-funded school districts. [↗](#)

Economic research findings:
Studies from the National Bureau of Economic Research (NBER) have demonstrated a strong correlation between school spending and property values, indicating that increased school funding directly translates to higher home prices. [↗](#)

Factors influencing the impact:

School district reputation:
The overall reputation of a school district, not just facility quality, plays a significant role in determining housing valuations. [↗](#)

Local market conditions:
The overall housing market dynamics in a region can also affect how much school facilities influence home prices. [↗](#)

Type of facility improvements:
Investments in specific areas like science labs, libraries, or athletic facilities may have a larger impact on housing values compared to general maintenance. [↗](#)

Research consistently shows that **increased school spending in a district generally leads to higher housing valuations**, meaning homes located in areas with higher per-pupil school funding tend to have higher property values; with studies often indicating that for every dollar spent on public schools, home values increase by around \$20. [↗](#)

Key points about school spending and housing valuations:

Positive correlation:
A strong relationship exists between the level of school funding and property values, with higher spending generally resulting in higher home prices. [↗](#)

Buyer preference:
Parents often prioritize access to good schools when buying a home, leading them to pay more for properties in well-funded school districts. [↗](#)

Resale value impact:
Homes in high-performing school districts tend to have better resale value due to increased buyer interest. [↗](#)

The Finance and Advisory Committee recommends FAVORABLE ACTION (3-1) on Article 2-11.

ARTICLE 2025/4 3-1 Hero Act

Article 3-1 seeks for the town to adopt a Massachusetts General Law Chapter 59, Section 5, Clause 22I. This clause takes existing property tax exemptions for certain eligible veterans and allows them to increase with inflation. This clause was passed by the state legislature in 2024. The adoption of this article will not have adverse impact to Town financials as there is very limited use of the existing exemptions and this article simply takes those and increases them with CPI. Currently the maximum tax exemption for eligible veterans is \$400 in annual taxes. Further given the sacrifices veterans have made for our collective benefit Fin-Com supports tax relief for these individuals.

The Finance and Advisory Committee recommends FAVORABLE ACTION on Article 3-1.

ARTICLE 2025/4 3-2 Extensions of Lease - Cutler School

The purpose of this article is to extend the lease of the Cutler School property for 50 years. The extension provides the Hamilton-Wenham Regional School District with the flexibility it requires to pursue a new school construction project.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 3-2.

ARTICLE 2025/4 3-3 Recreation Revolving Fund – Establish New Spending Limit

The purpose of this article is to authorize an increase in the annual spending limit (to \$825,000) of the Recreation Revolving Fund, which is currently set at \$750,000. The fund utilizes user fees to provide the programming to the Town residents. No tax revenue is expended.

The success of the department programming and general inflation and cost increases have created an expansion of expenses being paid from the revolving fund. This fund is managed by the Town Finance Department.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 3-3.

ARTICLE 2025/4 3-4 Acquisition of Easements – 12 Woodbury Street

The purpose of this article is to authorize the Select Board to acquire an easement on the property located at 12 Woodbury Street, Hamilton. (Owner is Essex County Greenbelt Association.) The easement will facilitate the siting of a water pump station and other infrastructure to facilitate a connection for an emergency water connection.

The Finance and Advisory Committee recommends FAVORABLE ACTION (3-0) on Article 3-4.

ARTICLE 2025/4 4-1 Zoning Bylaw Amendment - GPOD

This article, initiated by the Planning Board, requests that the Town of Hamilton Zoning Bylaw Section 9.1.4, Ground Protection Overlay District (GPOD), be amended so that the minimum lot size in the GPOD is 80,000 square feet per dwelling unit, a change from 80,000 square feet for a building lot. The GPOD was adopted as an overlay District superimposed on other Districts to protect ground water resources supporting the Town's water supply. Therefore, GPOD requirements and use restrictions are in addition to and supersede the requirements of the underlying zone. The Planning Board states that its intention with this amendment is to reinforce the water preservation objective, but primarily to eliminate any ambiguity in the interpretation of Section 9.1.4 of the GPOD in relation to Section 8.2, Senior Housing which allows for density greater than that permitted by the underlying zone.

However, several residents have commented that the proposed amendment would be a material change to the definition of minimum lot size in the GPOD rather than simply a clarification of ambiguity. They state that the plain text of the Bylaw, i.e. building lot, should be respected and further cite a 2014 legal opinion related to the Canterbrook Development where this topic was addressed.

While this amendment could impact the total housing stock in the Town and therefore costs and revenues, net financial impact is not ascertainable at this time.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-1.

ARTICLE 2025/4 4-2 Zoning Bylaw Amendment - Temporary Signage

This article requests amendment to Section 6.0 of the Town of Hamilton Zoning Bylaw as recommended by the Building Commissioner. Proposed Section 6.3.5.4 changes the definition of temporary signage by removing limits on the length of time certain lawn signs may be posted. Since the amendment is intended to cure potential infringement of the First Amendment right to protected speech, no financial impact is to be expected.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-2

ARTICLE 2025/4 4-3 Zoning Bylaw Amendment - Definitions

This article requests amendment to Section 11.0, Definitions of the Town of Hamilton Zoning Bylaw. Proposed Section 11.0 provides a more robust definition of “Gross Floor Area, Business” and “Gross Floor Area, Residential”. Areas to be included or excluded are defined with more specificity, leaving less to judgement and interpretation. No financial impact is to be expected.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-3.

ARTICLE 2025/4 4-4 Zoning Bylaw Amendment - Accessory Dwelling Units (1)

This article, initiated by the Planning Board, requests that the Town of Hamilton Zoning Bylaw Section 3.0 be amended to conform with the treatment of Accessory Dwelling Units (ADU) required by the Commonwealth’s Affordable Homes Act (Act). Section 8 of the Act, which became effective on February 2, 2025, provides a uniform statewide definition of ADU and makes the building of compliant ADUs in single family zoning Districts an “as-of-right”. Inconsistent local rules are superseded by the Act. The Planning Board intends with this amendment to align the Town of Hamilton Bylaw with the Commonwealth’s provisions. In promulgating the Act, the Commonwealth’s objective was to make housing more affordable by encouraging the creation of additional homes. Therefore, the financial impact to the Town is expected to be the additional cost of services provided to ADU dwellers net of a related increase in tax collections. An estimate is not currently determinable.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-4.

ARTICLE 2025/4 4-5 Zoning Bylaw Amendment - Accessory Dwelling Units (2)

This article, initiated by the Planning Board, requests that the Town of Hamilton Zoning Bylaw Section 3.0 be amended to conform with the treatment of Accessory Dwelling Units (ADU) required by the Commonwealth's Affordable Homes Act (Act). Section 8 of the Act, which became effective on February 2, 2025, provides a uniform statewide definition of ADU and makes the building of compliant ADUs in single family zoning Districts an "as-of-right". Inconsistent local rules are superseded by the Act. The Planning Board intends with this amendment to align the Town of Hamilton Bylaw with the Commonwealth's provisions. In promulgating the Act, the Commonwealth's objective was to make housing more affordable by encouraging the creation of additional homes. Therefore, the financial impact to the Town is expected to be the additional cost of services provided to ADU dwellers net of a related increase in tax collections. An estimate is not currently determinable.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-5.

ARTICLE 2025/4 4-6 Zoning Bylaw Amendment - Inclusionary Housing Bylaw

This article, recommended by the Affordable Housing Trust and the Planning Board, requests amendments to Section 8.3, the Inclusionary Housing provisions of the Town of Hamilton Zoning Bylaw. Several areas have previously required interpretative guidance from Town Counsel suggesting the need for additional clarification. Among the changes to Section 8.3, segmentation of the development to avoid compliance with the Section is specifically prohibited. In addition, a numerical example is codified to clearly demonstrate how the required number of "Affordable Housing Units" (AHU) is to be determined. The proposed amendment also clearly specifies the benchmark, 3 times AMI, to be applied when performing an "equivalent fee in lieu of units" computation. Further, while prescribing the Planning Board as the body authorized to administer the Inclusionary Housing provisions and promulgate rules and regulations when needed, the amendment revises references to various other parties responsible for the administration of this Section. Finally, a new Subsection requires the AHU to be deed restricted as an ADU in perpetuity or as long as legally allowed. This article addresses ambiguity in the interpretation of the Town of Hamilton Zoning Bylaw related to Inclusionary Housing and therefore should have no associated financial impact.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-6.

ARTICLE 2025/4 4-7 Zoning Bylaw Amendment – Site Plan Review

This article, initiated by the Planning Board, requests amendments to Section 10.6 and 11.0 of the Town of Hamilton Zoning Bylaw needed to streamline and reorganize provisions related to Site Plan Review applications. Specifically, the revised bylaw adds a requirement for Pre-Application Conferences in certain enumerated situations. In addition, Regulations, to be proposed by the Planning Board, specifying the contents and procedures governing Site Plan Review applications will be forthcoming. The Planning Board’s clarification and streamlining of the Site Plan Review process through this amendment is not expected to have a financial impact.

The Finance and Advisory Committee recommends FAVORABLE ACTION (4-0) on Article 4-7.

ARTICLE 2026/5 4-8 Zoning Bylaw Amendment - FEMA Flood Maps

This article requests that the Town of Hamilton Zoning Bylaw Section 9.2 Flood Plain Overlay District (FPOD) be amended so that the FPOD boundaries per the Bylaw conform with the Flood Insurance Rate Map (FIRM) issued by the Federal Emergency Management Agency (FEMA) in January 2025. The FIRM is utilized by FEMA in administering the National Flood Insurance Program. If the Town is to continue participation in the National Flood Insurance Program, it must amend the Bylaw to incorporate the FIRM changes within 6 months of issuance. The Massachusetts Department of Conservation and Resources reviewed the Bylaw and recommended changes needed for compliance. The purpose of this amendment is to adopt these revisions. Failure to adopt these changes will result in Hamilton being suspended from the National Flood Insurance Program and property owners within the flood plain would face potential insurance related financial impacts.

The Finance and Advisory Committee recommends FAVORABLE ACTION (3-0) on Article 4-8.

ARTICLE 2025/4 5-1 Citizens’ Petition

Brief Summary: This article was submitted as a non-binding advisory question seeking to determine whether Town Meeting supports a consolidated elementary school or the renovation, maintenance and/or repair of the existing Buker, Winthrop and Cutler Elementary Schools.

Should the Hamilton-Wenham Regional School District (and the Towns of Hamilton and Wenham and all relevant boards and committees): (i) permanently abandon their plans and efforts with respect to the consolidation of any or all elementary schools in the District; and (ii) pursue and use the resources available to them, including any future financial awards or grants from the Massachusetts School Building Authority, to

renovate, maintain and/or repair the Buker, Winthrop, and Cutler schools in their current locations.

The Finance and Advisory Committee declined (4-0) to offer a vote on this Article.

Respectfully Submitted,

Hamilton Finance and Advisory Committee

John McGrath, Chair
Alex Rindels, Vice Chair
Christopher Woolston, Secretary
Harry Philip
John Pruellage
Sandra McKean – Associate Member

P.S. Thanks to the members of the Town and School District administrative and financial teams for partnering with members of the FINCOM as we constructed this document.