

FY2025 Budget Guidance Letter



To: Carlisle Town Departments, Boards and Commission Chairs

From: Carlisle Finance Committee

Subject: Fiscal Year 2025 Budget

Date: November 9, 2023

The Carlisle Finance Committee requests your help in preparing the Town Budget for Fiscal Year 2025. **Please note, all budget requests are due to the Town Administrator by November 30th, 2023, in electronic form. These requests include operational budget requests, updates to capital items, and any warrant article placeholders. Please do not print requests. Email them in the provided excel format.**

Our revenue forecasts indicate a tight budget with new revenue falling short of mandatory expenses. Early estimates for the school systems, insurance, and the retirement assessments indicate little room for new spending.

The Select Board and Finance Committee want to prioritize existing employees in this budget cycle, contemplating adjustments to the employee compensation package. This will again be priority one in the FY25 budget cycle. Given the limited revenue, all requests for new services to include additional employees or hours will need to outweigh this priority.

The second priority is maintaining current levels of service in Carlisle. We are asking each department, board, and commission to prepare a budget that reflects ongoing efforts to innovate and presumes no change in funding except for contractually negotiated wage increases and employee step increases. If you are proposing to hire additional staff, add hours for existing staff, or reclassify job descriptions, you must gain the approval of the Town Administrator and Select Board prior to presenting your request to the Finance Committee in January. If you do not gain approval prior to submitting your department request, please do not include the costs in your draft budget. Describe them in narrative form.

The FY25 budget process will follow three stages, as in prior years. Please also note the attached Budget Calendar for approximate budget dates.

I. Draft Budget

All budget requests are due to the Town Administrator by November 30th, 2023, in electronic form. Please see additional details below:

- All town departments must provide their FY25 budget request in the format provided by the Town Accountant. This allows for entry into our MUNIS format, prevents errors, and allows us to communicate budget changes clearly and effectively. Please note that we expect to consolidate maintenance budgets for non-school departments in FY25. Be prepared to explain line items you believe are not a fit for centralization.
- Do not include COLA in your budget requests, but please submit all known step increases and contractual wage changes. Kelly can provide you with this information if you do not have it.
- *Please include capital requests and potential warrant articles in your initial budget draft. Use the capital request document to identify any changes, additions, or deletions from the current plan. Attach all supporting documents. We have attached the known 5-year capital plan for you to review and update.*
- All budget preparers will get a copy of the summarized draft budget presented by the Town Administrator to review with their boards and committees.

II. FY25 Finance Committee Meetings (January 2024)

The Finance Committee will schedule meetings with each department to analyze and discuss submitted budget requests after reviewing department requests and meeting with the Town Administrator and Select Board. Included in this process will be a level of analysis from the Town Administrator and Financial Management Team to include employee compensation and comparing costs across departments. Budget preparers can expect these meetings to begin in early January and all preparers will be asked to discuss the attached questionnaire. It is strongly advised that you review the questionnaire with your liaison.

III. Final Budget Recommendation (March 2024)

The Finance Committee will present a final FY25 Budget recommendation in March to the Select Board. A Public Budget Hearing will occur prior to the assembling of the Town Meeting budget. Please see the [FY25 Budget Page](#) (includes the budget calendar) for more information and note that this link contains the latest calendar information and is subject to change. The final budget will go to Town Meeting for a vote.

We appreciate the flexibility and commitment shown by all departments during the last two fiscal years. We look forward to collaborating with you to formulate an FY25 Budget that balances the needs of the Town and its resources.

If you have any questions, please contact your Finance Committee liaison or the Town Administrator.

Sincerely,

The Carlisle Finance Committee

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FY25 Finance Committee Departmental Liaison Assignments

Assessors	Lynne Lipinsky
Board of Health	Marc Bernstein
Carlisle Public Schools	Aaron D'Elia
Concord Carlisle Regional School	Victor Liang
Conservation Commission	Craig Leelman
Council on Aging and Human Services	Marc Bernstein
Finance Department	Lynne Lipinsky
Fire Department	Heidi Sjoberg
Library	James Catacchio
Planning Board	Craig Leelman
Police Department	Heidi Sjoberg
Recreation Commission	James Catacchio
Select Board	Lynne Lipinsky
Town Hall /DPW	Lynne Lipinsky

Carlisle FY25 Budget – Departmental Questionnaire

Department:

Department Budget Contact(s):

Please provide your Finance Committee liaison with responses to ALL questions by Thursday, November 30, 2023.

1. Were your **FY24 actuals** more/less than the budgeted amount? If yes, please explain. Do you expect your **FY24 actuals** to be more/less than the budgeted amount? If yes, please explain.
2. Do you anticipate your budget to include decrease/increase in **non-wage expenses** in FY25?
3. Do you anticipate budget request change in staff **hours** or number of **positions**. The Town Administrator and Select Board must approve these staffing requests prior to including in your budget. Have you completed this approval process for any changes included?
4. Do you have any changes of **Capital** requests contrary to the capital plan provided for your department for FY25 ? If yes, have you informed the Town Administrator and your Liaison and submitted the capital plan update form?
5. Would any **Warrant Articles** be needed to carry out your plans for FY25?
6. What are the main **unknowns and/or risks** in your FY25 budget request?
7. If you were asked to make reductions what area(s) would you target?
8. Please attach any other information you think will help Finance Committee in reviewing your FY25 budget request.