



**Town of West Newbury  
Select Board  
Tuesday, January 17, 2023 @ 5:30pm**  
381 Main Street, Town Office Building  
[www.wnewbury.org](http://www.wnewbury.org)

REC'D N. NEWBURY CLERK  
23 JAN 12 PM 4:35

**AGENDA**

***Open Session: 5:30pm by in-person attendance or remote participation (instructions below)***

**Announcements:**

- This meeting is being broadcast on local cable TV and recorded for rebroadcast on the local cable channels and on the internet. Meeting also accessible by remote participation; instructions below.
- Select Board to vote to close warrant for Spring Annual and Special Town Meetings on Monday, February 6<sup>th</sup>
- SAGE Center News: Jan/Feb 2023. Many upcoming events.; see details in current newsletter available on Town website [www.wnewbury.org/senior-center/newsletters](http://www.wnewbury.org/senior-center/newsletters)
- Call for volunteers! Open positions on Boards/Commissions/Committees. See [www.wnewbury.org/volunteer](http://www.wnewbury.org/volunteer)
- Reminder to subscribe for emailed Town agendas/news/announcements at [www.wnewbury.org/subscribe](http://www.wnewbury.org/subscribe)

**Regular Business**

- A. Presentation of G.A.R. Memorial Library Strategic Plan, FY24-FY28 – *Board of Library Trustees*
- B. Review/endorsement of proposal to CPC to seek Town Meeting approval to transfer funding from the Community Preservation Fund (Housing Reserve) to the Affordable Housing Trust
- C. Review/endorsement of proposed updated Memorandum of Understanding Between Pentucket Regional School District and West Newbury Police Department to maintain the partnership between the District and the Police Department to provide a School Resource Officer
- D. Review of Town of West Newbury Employee COVID-19 Exposure Protocol (last update July 25, 2022)
- E. Meeting minutes: November 15, 2021

**Town Manager Updates**

- F. Recent publication of Final Credit Opinion, Moody's Investors Service
- G. Year-to-date General Fund expenses and revenues
- H. Recent submittal by Climate Change Resiliency Committee of Expression of Interest (EOI) for FY24 Municipal Vulnerability Preparedness (MVP) Action Grant
- I. Updates re active/pending projects
- J. Follow up meeting assignment; placing items for future agendas

**Executive Session: Immediately following Open Session, in 1910 Building: Town Manager's office**

- ❖ MGL Ch. 30A §21(a) 3: To discuss strategy with respect to collective bargaining or litigation if an open meeting may have a detrimental effect on the bargaining or litigating position of the public body and the chair so declares (*Police Union contract*);
- ❖ MGL Ch. 30A §21(a) 2: To conduct strategy sessions in preparation for negotiations with nonunion personnel or to conduct collective bargaining sessions or contract negotiations with nonunion personnel (*Water Superintendent transition; Town Manager contract*);
- ❖ MGL Ch. 30A §21(a) 6: To consider the purchase, exchange, lease or value of real property if the chair declares that an open meeting may have a detrimental effect on the negotiating position of the public body (*31 Dole Place*);
- ❖ MGL Ch. 30A §21(a) 7: To comply with, or act under the authority of, any general or special law or federal grant-in-aid requirements (*work scope for Special Counsel services*).

**Addendum to Meeting Notice regarding Remote Participation**

Public participation in this meeting of the West Newbury Select Board will be available via remote participation. For this meeting, members of the public who wish to listen to the meeting may do so in the following manner:

**Zoom Meeting**

Phone: (646) 558 8656  
Meeting ID: 869 8719 5343  
Passcode: 953527

Join at: <https://us06web.zoom.us/j/86987195343?pwd=ZFRSSTJ2Z2lja2NFNHAXeIYyNFRSQT09>

Every effort will be made to ensure that the public can adequately access the proceedings in real time, via technological means. In the event that we are unable to do so, despite best efforts, we will post on the West Newbury website an audio or video recording of proceedings as soon as practicable after the meeting.

*Posted Agenda on 1/12/2023 at the Town Offices and the Town's Official Website [www.wnewbury.org](http://www.wnewbury.org)*



# G.A.R. Memorial Library Strategic Plan FY24 - FY28

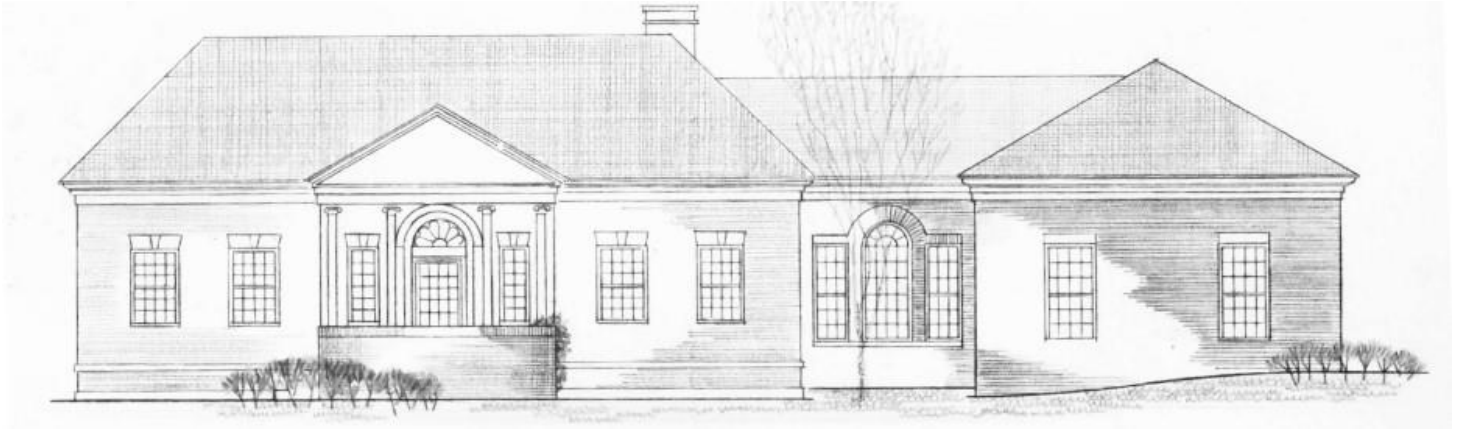


TABLE OF CONTENTS	PAGE
Community Description	3
Brief Library History and Governance	4
Library Overview	6
Planning Process	9
Strategic Planning Committee	10
Needs Assessment & Results	11
Mission and Vision Statements	13
Goals and Objectives	14
Governing Board Approval	17
Appendices	18
Appendix A: History of the G.A.R. Memorial Library	19
Appendix B: Community and Library Scan	21
Appendix C: Strategic Committee Meeting Summaries	24
Appendix D: Survey Results	29

## Community Description

West Newbury (also referred to as the “Town”) was first settled in 1635 as part of neighboring Newbury. On February 18, 1819, the General Court of Massachusetts passed an act “to incorporate the town of Parsons.” The initial proposals had been made in the late 18th century, but determined resistance from the neighboring town of Newbury, which had already lost Newburyport, blocked the measure for decades. On June 14, 1820, the legislature passed another act to change the name to West Newbury.

West Newbury is a part of Massachusetts’ North Shore and Merrimack Valley regions. Located in Essex County, West Newbury lies along the southern banks of the Merrimack River, 10 miles upstream from the Atlantic Ocean. The town is located approximately 13 miles northeast of Lawrence and 34 miles north of Boston. It is bordered by Merrimac and Amesbury to the north, Newburyport to the east, Newbury to the southeast, Groveland to the southwest, and Haverhill to the west. The Rocks Village Bridge across the Merrimack River is the only access to the northern banks of the river in town; there is no direct route into Merrimac and Amesbury. According to the United States Census Bureau, the town has a total area of 14.7 square miles, of which 13.4 square miles is land and 1.3 square miles, or 8.65%, is water.

Over the last forty years, West Newbury has developed from a rural farming town into an affluent, semi-rural community. Its picturesque location along the Merrimack and proximity to Boston have attracted new families from neighboring communities, creating a significant shift in demographics and an influx of development. Environmental sustainability and maintaining the Town’s semi-rural character are major priorities within the community, and the Town has invested significant resources into preservation and sustainability projects in recent years.

# Brief Library History and Governance

West Newbury's first library was formed in 1819, the year West Newbury became a town. Called the "First Social Library," it was a private institution that was housed in many different locations. In 1894, after the State of Massachusetts offered \$100 for books to any town that established a public library, the building and its contents were turned over to the Town, and the first free public library was founded.

As early as 1874, the Major Boyd Post, representing the veterans of the Grand Army of the Republic or G.A.R., conceived the idea of a town library as a Civil War Memorial and began raising funds. In 1917 Louisa and Georgiana Emery gave the town the land on which the library now stands, then containing the Albion Hotel.

By 1937 the G.A.R. fund had grown to \$13,344.17 and the original library building, designed by Russell Peirce, a Newburyport architect and a native of West Newbury, was erected. In 1975 the attic space was converted to a children's room and, in 1987, the town voted to override Proposition 2½ to spend \$1,200,000 in order to triple the size to the current library building.

Since 1894 there have been eight library directors:

Caroline Carr	1894–1914
Sadie Bailey	1914–1953
Esther D. Thurlow	1953–1957
Janet M. Smith	1957–1959
Harriet Campbell	1959–1967
Katharine M. Gove	1967–2013
Susan C. Babb	2013–2019
Corinn Flaherty	2019–present

## Staffing:

As of July 1, 2022, there are two FT (full-time) staff and 6 PT (part-time) employees, resulting in an FTE (full-time equivalency) of 4.90, which is well below the other 369 certified libraries in the state when considering circulation volume and hours open; West Newbury ranks in the bottom 18% (311 out of 369). Our hope is that over the next two fiscal years we will be able to add one additional 10-hour/week position and one additional 20-hour/week position, which will bring our FTE up to 5.65. The library director has an MLS (masters in library science). Both library director and children's librarian are full-time.

**Merrimac Valley Library Consortium:**

The G.A.R. Memorial Library (Library) is one of 36 libraries that belong to the Merrimack Valley Library Consortium (MVLC). MVLC membership provides the online catalog and access to the digital Overdrive Library, as well as many databases. If the Library does not have an item, it can be requested from another library and delivered to West Newbury for our patron.

**Library Governance:**

The Library is a department of the Town, governed by an elected board of nine library trustees (Board). The Board's authority is derived from Chapter 78, Sections 10 and 11 of the Massachusetts General Laws. Section 11 states in part that "the board shall have the custody and management of the library ... and of all property owned by the town relating thereto. All money raised or appropriated by the town for its support and maintenance shall be expended by the board, and all money or property that the town may receive by gift or bequest ... shall be administered by the board." Responsibility for Library management, collection development, and provision of library services to the public is delegated by the Board to the library director. The director is appointed by and directly responsible to the Board, and is an employee of the Town of West Newbury.

**Support:**

The Friends of the West Newbury Library provide critical support for all programming, especially for the summer reading programs, and purchase most of the museum passes. The Massachusetts Board of Library Commissioners provides State Aid Awards to all certified libraries in Massachusetts. In FY 2022, the Library's State Aid Award totaled \$8,828.89.

# Library Overview

The G.A.R. Memorial Library is located in West Newbury's Historical District at 490 Main Street. The Library is a central gathering place in the West Newbury community. It is an inclusive and welcoming environment, staffed by friendly and knowledgeable professionals who are passionate about providing personalized, thoughtful service.

The building was last expanded in 1987, just before the ADA (American with Disabilities Act) took effect. Consequently, the second floor and outdoor courtyard are not handicap accessible and are not open to the public.

The Library is well-landscaped through the combined efforts of the Town, the Board, and the Garden Club. Any expansion beyond the footprint of the existent building is restricted due to the surrounding septic systems.

Children's programming is and always been one of the strengths of the Library. For over 45 years, the children's librarian, Kate Gove, has developed and provided excellent programs for children, with financial support from the Friends of the Library.

Local history is rich, and the Library holds a small collection of historical artifacts. In 2019 a digitizing initiative was established. The Library worked in coordination with the Historical Commission and the Town Clerk to digitize all Town Reports from 1838 to 2020, along with other items and collections. The future storage and care of these materials remains uncertain.

Broad community support for the Library in West Newbury is clear. Of 59 public libraries in the state with populations between 3,000 and 7,000, West Newbury ranks 5th in per capita library usage. West Newbury's children's department is also one of the busiest of the 59 libraries, coming in 5th in total circulation.

In a recent community-wide survey, residents highlighted the following as the Library's most valuable assets:

- Easy access to a diverse array of information and materials via the Library's own collection and through the Merrimack Valley Library Consortium and the state's collaborative resource sharing system
- Personalized service provided by knowledgeable and friendly staff
- Welcoming and inclusive small-town atmosphere where "everyone knows your name"
- Thoughtful and dedicated service of our long-time children's librarian, Kate Gove
- Ability to access downloadable books and other digital resources
- Access to educational and enriching programming for all ages

The survey participants, and later the Strategic Planning Committee (Committee), identified the challenges facing West Newbury today: mounting economic and environmental concerns that strain Town resources; development and demographic shifts and their potential impact on community resources and the landscape; challenges in keeping up with advancing technology; budget cuts in the public school system as a result of the override failing in two of the three towns that make up the local regional school system; political and civic unrest and/or disengagement; a lack of easy access to Town records and local history items; and few establishments or places in Town to connect and meet with others. It was also observed that many people, including regular Library users, are unaware of the range of services offered by the Library.

The current Library building is inadequate in meeting the needs of modern Library users. Of all 369 certified public libraries in Massachusetts, the G.A.R. is one of only 61 libraries that does not have a large meeting room for events, and it ranks 333rd when considering the date the main library building was last renovated. Survey participants also expressed a desire for expanded hours, especially on weekends in the summer.

Finally, the pandemic's effect and ongoing influence on Library usage and trends must be taken into consideration when thinking about the future of the Library.

During the height of the pandemic, residents were working from home and not attending school in person. This caused a major shift in how and when patrons used the Library. As a result, the Library closed two nights per week to conserve its limited staff for times when demand for services was highest and focused on reaching patrons in a variety of new and creative ways. We increased our digital resources, initiated virtual programming, and created opportunities for the community to interact with us via social media, our Poet-Tree, and the many StoryWalks that Kate Gove created throughout the year for families to enjoy.

Many of these services remain in place to this day. Virtual programming opened up a world of opportunities for individual libraries to pool resources. This allowed libraries with limited resources to provide programs that would have otherwise been cost or space prohibitive.

The Library held 53 virtual adult programs in FY 2021 with 654 attendees, a 62% increase in attendance over FY 2020. Adult attendance increased another 63% in FY 2022, with 1,066 people attending 61 programs. Our StoryWalk is now a permanent fixture on the lawn, providing families with a monthly rotation of new stories to enjoy outdoors.

Since the start of the pandemic, the Library has also experienced an overwhelming increase in demand for electronic content, including ebooks and other digital services. Our ebook and streaming usage increased 38%



between FY 2020 and FY 2021. We saw the same trend in FY 2022, and we expect it to continue in future years as well.

After a year of being open for curbside service only due to the pandemic, the Library resumed in-person services in May 2021. Within the year, Library usage surpassed pre-pandemic circulation and programming attendance and has continued to increase steadily. In FY 2022 circulation was the highest since FY 2016. However, general foot traffic has not yet returned to pre-pandemic levels. As is also the case in neighboring libraries, foot traffic dropped most significantly in the evenings.

In spite of this, survey data and community feedback revealed a desire for more evening hours. In the spring of 2022, the Town approved the creation of a new 10-hour library assistant position, which allowed the Library to reopen an additional evening per week starting in FY 2023 and, for the first time in Library history, to remain open on Saturdays throughout the summer.

Though this staffing increase has helped to mitigate the Library's chronic understaffing, additional staffing is needed in order to achieve a sustainable model for our hours open and services provided.

The role of libraries everywhere is changing rapidly, and patrons are using libraries differently than in the past. Libraries are no longer simply repositories for books and information. They are places to meet, study, socialize, and attend programs. People come in to use our computers, print, scan, and use the Wi-Fi. Our physical collections are changing, too. Soon, items like DVDs and CDs will no longer circulate, and the spaces that house these collections will have to be repurposed. As we continue to migrate in a digital direction with digital collections slowly replacing the physical, people will continue to need community gathering places and shared workspaces. They will continue to need access to information and educational and recreational activities. We can accommodate these changing needs by rethinking how we use our public spaces and buildings. Creating flexible physical spaces with features such as mobile shelving and seating areas will allow us to adapt to the evolving needs and interests of the West Newbury community.

## Planning Process

This strategic plan, and its goals and objectives, are based on input from a broad range of stakeholders in the West Newbury community. The Library solicited community feedback in a number of ways in order to assess its performance and identify future needs. Information was gathered over a five-month period, from March to July 2022, via a community survey, interviews, and both in-person and remote meetings of the Strategic Planning Committee, the Board of Library Trustees, the Friends of the West Newbury Library, and Library staff.

A town-wide survey was conducted in April 2022. The survey was posted on the Library's website and Facebook page and was sent out via the Town-wide email distribution list. It was also published in the local paper, and paper copies were made available at the Library, Town Hall, and Council on Aging. More than 281 responses were received.

## Strategic Planning Committee

The members of the Strategic Planning Committee were personally invited to participate on the Committee because of their individual dedication and unique contributions to the Town of West Newbury and the Library. The Library Board of Trustees sincerely thanks the Strategic Planning Committee for their participation and commitment to helping shape the Library's future:

Jim Blatchfeld

Julia Bleichfeld

Allie Bleichfeld

Paula Breger

Laura Collins

Rachel Costello

Dianne Faulkner

Corinn Flaherty

Joanne Gay

Elisa Grammar

Bob Janes

Jane Martin

Mary Moody

Wendy Reed

Kelly Scott

Lydia Sisson

Dawn Watson

Charles Wegrzyn

# Needs Assessment & Results

Strategic planning consultants Abby Strauss and Greg Proventiz facilitated the first of two meetings of the Strategic Planning Committee. In the first meeting, held in May 2022, Abby asked comprehensive and open-ended questions that inspired the group to consider the Library in the context of global, national, regional, and local trends. Anything that might influence library usage and service needs now and in the future was considered.

Next, she asked the Committee to imagine how the community, technology, and region might be different in 2028, and to envision what services and opportunities their ideal future Library would provide to ensure that all members of the community find the Library to be a valuable Town resource that informs and enriches their lives.

Finally, Abby utilized an analysis technique (KAIR: Keep, Abandon, Invent or Reinvent) to assess what the Library is currently doing well and should continue doing, what isn't working and should be abandoned, and what the Library might invent or reinvent to improve services and collections.

In the second meeting, held in June 2022, the Committee discussed and analyzed the survey results. Corinn Flaherty, the library director, led the Committee in a community visioning exercise, the purpose of which was to determine areas where the Library can grow and improve services. When considering the Library's assets and challenges, numerous creative solutions and ideas were generated that addressed how the Library can meet future community needs.

Several key focus areas were identified:

- Community/Schools
- Information/Collections/Local History
- Building/Grounds
- Programming
- Services

The Committee then worked to broaden and simplify these focus areas to establish goals and objectives that support the Library's commitment to serving as a true community hub for learning, recreation, studying, working, and socializing for community members of all ages, abilities, and backgrounds.

## **Community**

Feedback revealed a desire for more opportunities to connect with others and to leverage individual local knowledge to benefit all. The Library is expected to be a unifying force in the community by enhancing relationships, supporting the schools, preserving and providing access to West Newbury's unique cultural legacy, and working in partnership with other Town departments, boards and committees.

## **Services**

The Committee decided that the Library should provide a diverse selection of physical and digital materials and easy access to information, along with a broad range of educational and entertainment opportunities for everyone in the community. It was noted that the Library should seek to remove any barriers to service and increase outreach and marketing while continuing to evolve as the community changes. Additionally, innovative solutions for fundraising should be pursued to promote more flexibility when budgeting for programs and materials.

## **Space**

The Committee deemed it essential that Library space expand to allow for adaptable and modern community meeting, work, study, and recreation needs. Creative solutions to achieve this included reconfiguring the first floor, adding an elevator to make the second floor ADA compliant and therefore accessible to the public, and conducting a feasibility study to determine if Old Town Hall might be used as supplemental Library space. Better use of all outdoor space was also suggested; creating reading gardens and making the courtyard an accessible space were offered as possibilities. The Committee also wanted to see the Library serve as role model/education hub for conservation and sustainability efforts.

At the conclusion of the strategic planning process, a thorough review of the survey data and meeting results provided insights regarding both community perceptions of the Library presently and its expectations for the Library's future. The Strategic Planning Committee established broad goals and objectives, designed to guide the work of the Library and prioritize the allocation of Library resources, while being flexible enough to accommodate unanticipated challenges. New mission and vision statements were created based on these goals and objectives. This strategic plan will serve as a community-driven, high-level road map that will guide Library programming and services over the next 5 years.

# Mission and Vision Statements

## Mission Statement

The mission of the G.A.R. Memorial Library, as a tax-supported public library, is to strengthen community connections and enrich civil society through programs, services, and collections designed to cultivate literacy, civic engagement, and cultural appreciation, as well as to preserve West Newbury's unique identity, history, and sense of place.

## Vision Statement

To be a haven for community connection, knowledge, and recreation.

# Goals and Objectives

**Goal 1: Community:** The Library is a uniting force in the community.

## Objectives

### a. Enrich relationships

- The Library will reimagine and grow programs that connect local residents with each other across generations.
- The Library will utilize local expertise and knowledge to broaden both understanding of specific subjects and fellowship among local residents.
- The Library will provide opportunities for social engagement and cultural diversity.

### b. Support the schools

- Library staff will “bring the Library” to the local schools by being a presence in both the Page and Pentucket Schools.
- The Library will work to enhance the curriculum at the local schools.
- The Library will provide volunteer and learning opportunities for all school-age children in the community.

### c. Preserve and provide access to West Newbury’s unique cultural legacy

- The Library will explore projects that will preserve the cultural heritage of the Town by conserving, digitizing, and making accessible existing historical collections.
- The Library will pursue new initiatives and projects that will illuminate West Newbury’s past and present.
- The Library will train all staff on local town resources.

### d. Increase presence in the community

- The Library will expand partnerships with organizations that can help promote library offerings.
- The Library will improve awareness about services, programs, and collections.
- The Library will deepen its commitment to teaching patrons how to use library resources.
- The Library will encourage patrons to become library promoters in their community.

**e. Work in partnership with other Town departments, boards, and committees**

- The Library will collaborate with other Town departments, committees, and groups in a way that mutually benefits everyone in the community.
- The Library will seek to develop volunteer opportunities that cross-pollinate among Town departments.
- The Library will work with the Historical Commission and Town Clerk in the ongoing maintenance and storage of all three local history collections.

**Goal 2: Services:** Collections, programs, and services reflect the needs and interests of the community.

**Objectives**

**a. Educate all ages with an array of resources and materials**

- The Library will offer access to a wide range of new/emerging technologies and instruction on how to use them.
- The Library will continue to expand its growing Library of Things to reflect new and emerging needs and interests in the community.
- The Library will provide a diverse collection of up-to-date information in physical and digital formats and provide instruction on how to access the information.
- The Library will promote democracy and political literacy and provide opportunities for civic engagement.

**b. Entertain residents of all ages, abilities, and backgrounds**

- The Library will expand and diversify in-person and virtual programming with the aim to provide “something for everyone.”
- The Library will prioritize growing the Library’s collection of ebooks and other digital collections based on local demand.
- The Library will highlight cultures from around the nation and the world.

**c. Evolve to address changing needs and interests of community**

- The Library will solicit feedback from the community regularly to inform services and to ensure there are no avoidable gaps in service.



- The Library will look to local, national, and international trends when planning programming and curating collections.
- The Library will hire and train staff to meet the needs of a growing community.
- The Library will develop and expand public and private funding sources.

**Goal 3: Space:** The Library provides a nurturing, inclusive, and modern space to work, study, and socialize.

### **Objectives**

#### **a. Serve as a hub regarding climate change and sustainability**

- The Library will provide education and information about local, regional, and national issues and initiatives related to climate change and sustainability.
- The Library will prioritize and pursue sustainable practices, utilities, and clean energy.
- The Library building will be integrated into the Town’s emergency infrastructure.

#### **b. Seek innovative design solutions**

- The Library will seek to meet numerous needs based on innovative design and furnishings, using creative solutions to address space and construction limitations.
- The Library grounds and courtyard will be accessible and well-designed for patron enjoyment and enrichment.
- The Library will seek to explore, develop, and implement pioneering technological solutions whenever possible.
- The Library will seek to create dedicated space for private study, large events and meetings, and proper storage of local history collections.

#### **c. Endeavor always to be inclusive to all groups and individuals**

- The Library will maintain its intimate feel as a place “where everyone knows your name.”
- Collections will be developed with the purpose of educating and enriching all members of the community.
- The Library will provide space for anyone in the community to gather, work, study, and socialize.

# Governing Board Approval

The G.A.R. Memorial Library Board of Library Trustees approved and adopted this Strategic Plan at their meeting on September 13, 2022.

Fred Chanania, Chairperson

Marcia Sellos-Moura, Vice-Chairperson

Tom Salvo, Treasurer

Laura Collins, Recording Secretary

Sandy Nawrocki, Corresponding Secretary

Amy Custance

Heather Conner

Paula Breger

Ashley Adams

# Appendices

# Appendix A

## History of the G.A.R. Memorial Library

West Newbury's first library was formed in 1819, the year West Newbury became a town. Called the "First Social Library," it was a private institution that was housed in many different places including the #1 school house, barber shop, and First Parish Meeting House.

Several other libraries existed during the 19th century, including one formed around 1870 by Leonard Woodman Smith, a local historian and journalist, in his home on Maple Street. A card cost seventy-five cents per year.

In 1874 the Merrimac Lodge of Good Templars, assisted by the Debating Club, made an effort to start a town library. This was first located in the Good Templars' Hall over Whittier's Store, where Brunault's Auto Repair now stands. In 1875 the Ladies' Library Association was formed to help the library "in all needful ways." The Ladies raised \$114, and Hayden Brown, a local businessman in the comb industry, offered the library a room in a building that he owned on the site of the present-day Food Mart. That same year the salary for the librarian was \$1 per week.

During the 1880s, the local newspaper, *The West Newbury Era*, campaigned for a public library, suggesting that the building should be "something substantial, but nothing fancy. ... An artistic edifice (in a town like this) in which to house a library, is as needless as a ten dollar hat to keep the cold from a feminine head!"

But in 1883 the Ladies' Library Association voted against giving the library to the town and, in 1886, bought Martin W. Wood's blacksmith shop at the corner of Main and Mechanic Streets, converting it to a library building. In 1891 this building was moved to land near Post Office Square. In 1894, after the State of Massachusetts offered \$100 for books to any town that established a public library, the building and its contents were turned over to the town, and the first free public library was founded.

As early as 1874, the Major Boyd Post (representing the veterans of the Grand Army of the Republic, or G.A.R.) conceived the idea of a town library as a Civil War Memorial and began raising funds with such events as "The Great and Thrilling Military, a Five Act Drama entitled SURROUNDED BY FIRE" with tickets at twenty-five cents

and reserved seats at thirty-five cents. From 1894 until 1914, the librarian was Caroline Carr.

In 1902 the Major Boyd Post gave the town \$2,400 for a Memorial Hall with a room for a library, and in 1917 Louisa and Georgiana Emery gave the town the land on which the library now stands, then containing the Albion Hotel.

Operation of the library continued in the old blacksmith shop until the 1920s, when the deteriorating condition of the building forced it to move. With an offer of free rent from the Charles L. Carr Post 240 of the American Legion and with money raised by the town for renovation, the town citizens moved all the books in January of 1927 to the ground floor of the Legion Hall where they remained until 1939.

By 1937 the G.A.R. fund had grown to \$13,344.17 and the original library building, designed by Russell Peirce, a Newburyport architect and a native of West Newbury, was erected. The new building was dedicated in 1939. Sarah Bailey, who had been appointed director in 1914, remained in her position until retiring in 1953, when she was replaced by Esther Thurlow. Janet Smith served briefly from 1957 to 1958, followed by Harriet Campbell, who was director until 1967. Katharine M. “Kay” Gove guided the library from 1967 until her retirement in 2013, ushering us into the modern era with the addition of computers, online cataloging, books on CD, Playaways, CDs, DVDs, and Wi-Fi.

With ever-expanding use of the library, in 1975 the attic space was converted to a children’s room; however, much of this space is not able to be used as it is not ADA compliant. In 1987 the town voted to override Proposition 2½ to spend \$1,200,000 to triple the size of the library building.

The library was under the leadership of Susan Babb from July 2013 until June 2019. Corinn Flaherty became the eighth library director in June 2019.

*(Based on the work of Elizabeth Thompson (1903 to 1995) for many years our prolific historian.)*

Retrieved 5/2/22: <https://www.westnewburylibrary.org/Pages/Index/131601/history>

# Appendix B

## Community and Library Scan

### Facts about the G.A.R. Memorial Library:

- 1819 the “First Social Library”
- 1874 West Newbury’s Grand Army of the Republic conceived the idea of a town library as a Civil War memorial
- 1894 first free library established
- 1917 land was given on which the library currently stands
- 1937 original building erected, designed by Russell Peirce
- 1975 expanded building to include second floor for children’s services, currently not being used because the second floor is not accessible and is therefore not ADA compliant
- 1987 expanded to current building size (7,785 square feet)

### Library Data (from MBLC 2021 Public Library Data):

- 59 libraries in Massachusetts with populations between 3,000 and 7,000
- G.A.R. circulation: 80,843, making it the 10th busiest library of the 59 libraries
- Circulation per capita: G.A.R. ranks 5th of the 59 libraries
- Total children’s circulation: G.A.R. ranks 5th of the 59 libraries
- Of all 369 certified public libraries in Massachusetts, G.A.R. ranks 333rd for when the main library building was last renovated
- G.A.R. is one of only 61 libraries out of 369 that does not have a large meeting room space. Of those 61, 46 have populations under 4,000

### Facts about West Newbury (2020 census):

#### Population and Households

- Population 4,688
- Households: 1,720, a 13% increase since 2015
- Households with individuals under 18: 464, a 19% decrease since 2015
- Households with individuals over 60: 881, a 10% increase since 2015

#### Demographics

- 95.6% white
- 4.4 % Black, American Indian, Asian, two or more races, and other

- Unemployment: 10.5%
- Median family income: \$161,071, a 16% increase since 2015
- Median tax bill: \$7,815, a 23% increase since 2015
- Registered voters (2022 West Newbury Town Clerk): 3,719, a 79% increase since 2015

## Education

- Population of K–12 in public school system: 79%
- Population of K–12 in private school: 21%
- Pentucket Regional High School ranks 108 of 378 in Massachusetts
- Age 25 or older with bachelor’s degree or higher: 63%

## Local considerations:

- Lack of event space
- Lack of meeting rooms for community groups
- Lack of private work/study space
- No centralized, climate-controlled archive for local history collections
- Soldiers and Sailors/Old Town Hall both either unused or underutilized
- New Pentucket Regional Middle School/High School
- New residential developments and a growing population

**Page Elementary School** currently has no librarian and no budget to buy new materials. Volunteers have been working to create a functioning library for FY 2023, but they have extremely limited funding and time and no formal training working in libraries. There is no formal plan for a future library.

**The Pentucket High School library** is operating and has one full-time certified librarian. Teachers can sign up to bring classes to the library to collaborate with the librarian. The librarian has a budget of \$750/year for new books and \$3500/year for contracted services to purchase databases and ebook collections. When the new high school and middle school construction is complete, the library will serve all students from 7th to 12th grade.

## Library Trends

The role of libraries everywhere is changing rapidly, and patrons are using libraries differently than in the past. Libraries are no longer simply repositories for books and information. They are places to meet, study, socialize, and attend programs. People come in to use computers, print, scan, and use the Wi-Fi. Our

physical collections are changing, too. Soon, items like DVDs and CDs will no longer circulate, and the spaces that house these collections will have to be repurposed. Libraries will continue to migrate in a digital direction with digital collections slowly replacing the physical, but people will continue to need community gathering places and shared workspaces. They will continue to need access to information and to educational and recreational activities. We can accommodate these changing needs by rethinking how we use our public spaces and buildings. Creating flexible physical spaces with features such as mobile shelving and seating areas will help libraries adapt to the evolving needs and interests of their communities.

**National/International considerations:**

- War in Ukraine
- Ongoing pandemic
- Political climate in US
- Prevalence of “fake news”
- Rapidly changing social media landscapes
- Recent surge of book banning/challenges
- Diversity, equity, and inclusion movements
- Work from home trend

**Sources:**

2020 Public Library Survey Statistics from FY2021 ARIS and Financial Reports:

<https://mblic.state.ma.us/programs-and-support/library-statistics/index.php>

U.S. Census data:

<https://data.census.gov/cedsci/table?q=West%20Newbury%20town,%20Essex%20County,%20Massachusetts>



# Appendix C

## Strategic Planning Committee Meeting 1

**Current Challenges:** What is happening in the world (globally, nationally, regionally, locally) that’s having/will have a big effect on the community, the region, and our library? Please think about opportunities as well as challenges.

**Our Best Future Scenario:** It’s 2028. We’ve successfully addressed the opportunities and challenges identified in 2022. How have the community and region changed; how has the library changed? How has our thinking changed? What are we able to do we couldn’t do before? How does this positively affect the people who use the library to work, study, and enrich their lives?

Current Challenges Locally, Nationally, Globally	Our Best Future Scenario For the Library in 2028
<ul style="list-style-type: none"> <li>• Climate change</li> <li>• Not all have equal access to technology</li> <li>• New school at Pentucket, failed override, cut budgets, no library budget for new books</li> <li>• No librarian/classes/budget for books at the Page School</li> <li>• Limited access to Town records</li> <li>• Local news is becoming a thing of the past</li> <li>• Loneliness epidemic</li> <li>• Lack of interest/knowledge of local politics</li> <li>• Lack of interest/knowledge of history</li> <li>• Limited opportunities for intergenerational engagement</li> <li>• Misinformation/fake news</li> <li>• Censorship/First Amendment rights issues</li> <li>• Covid and national politics have obscured community</li> <li>• Lack of opportunities to build community back</li> <li>• Development is bringing buyers for investment, not community</li> <li>• Lack of cultural diversity locally</li> <li>• Old Town Hall is unused and will decay and cost town more</li> </ul>	<ul style="list-style-type: none"> <li>• Library has preserved the cozy and welcoming aspects of the current space and has expanded to include modern meeting, presentation, and study space</li> <li>• Library provides a safe and nurturing space where all feel welcome</li> <li>• Library maintains its intimate feel, remains a place “where everyone knows your name”</li> <li>• Library is outfitted to serve as cooling center/charging location</li> <li>• Library utilizes solar and other sustainable utilities/clean energy</li> <li>• Library serves as role model/education hub for conservation efforts</li> <li>• Library has an organized and sound collection of old and ongoing town records available digitally</li> <li>• Library provides access to a wide range of new/emerging technologies and provides instruction on how to use them</li> <li>• Library continues to offer a wide selection of physical materials from its collection and through MVLC and the Mass Library System ILL program</li> <li>• Library has an expanded and growing Library of Things</li> <li>• Library offers continuing education to promote democracy and political literacy</li> <li>• Library has a large and always growing collection of ebooks and other online/downloadable material</li> <li>• Library provides opportunities for the community to meet and connect</li> <li>• Library promotes cultural and social diversity and acceptance</li> <li>• Library grounds are better utilized for patron enjoyment</li> <li>• Library collaborates with other Town committees and groups in a way that mutually benefits everyone in the community</li> <li>• Collaboration between/among Town departments is strong and all working toward common goal(s)</li> <li>• Library markets all its many resources well</li> </ul>

<p>money if no purpose (like Carr Post)</p> <ul style="list-style-type: none"> <li>• Recession/inflation creates need for more free resources and forms of entertainment</li> <li>• Mounting economic and environmental concerns put new pressures on our Town</li> <li>• Rapid rate of change in technology/information storage makes it challenging to keep up with</li> <li>• Lack of easy access to Town records and local history items</li> </ul>	<ul style="list-style-type: none"> <li>• Library hours meet needs of everyone in the community</li> </ul>
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**The Future Is Now (KAIR = KEEP, ABANDON, INVENT, or REINVENT):** Thinking about the future we imagine, what are we doing at the G.A.R. Memorial Library that we should KEEP? What no longer serves us that we should ABANDON? What might we INVENT or REINVENT that will help us create the best future for our library and our community?

<b>The Future Is Now (KAIR = KEEP, ABANDON, INVENT, or REINVENT)</b>	
<b>KEEP</b>	<ul style="list-style-type: none"> <li>• Small town welcoming environment</li> <li>• Charm and comfort of hometown library where all staff know you</li> <li>• Access to community resources and information</li> <li>• Being able to get wide variety of material from library network (MVLC) and through the state network</li> <li>• Friendly, helpful staff</li> <li>• In person advice and guidance/recommendations</li> <li>• Miss Kate!</li> <li>• In-person programs for all ages, especially kids</li> <li>• Virtual programs for adults</li> <li>• Discounted museum passes</li> <li>• Ebooks and other downloadable resources</li> <li>• Community partnerships</li> <li>• Keep relevant in face of change</li> <li>• Kids' to-go activity packet</li> <li>• Summer reading program</li> <li>• Book sale</li> <li>• Collaborating with other libraries for virtual programming</li> </ul>
<b>ABANDON</b>	<ul style="list-style-type: none"> <li>• No meeting room</li> <li>• No study rooms</li> <li>• Outdated carpet</li> <li>• No second floor or courtyard access</li> <li>• Not enough parking</li> <li>• Limited space for collections</li> </ul>

	<ul style="list-style-type: none"> <li>• Too small for community’s needs</li> <li>• Teen room</li> <li>• DVD collection</li> </ul>
INVENT/REINVENT	<ul style="list-style-type: none"> <li>• Offer a video game area</li> <li>• Program for meeting new residents</li> <li>• Delivery for disabled people or those who have no transportation</li> <li>• Better marketing to promote its assets—especially online resources—to the public</li> <li>• Role of the community library being enlarged to include the “culture” of this community</li> <li>• Better access to local history items</li> <li>• Better storage of local history items</li> <li>• Better utilization of outdoor space</li> <li>• Add a café</li> <li>• Add a meeting room</li> <li>• Add quiet study space / work rooms / remote workstations</li> <li>• Be a charging/cooling station</li> <li>• Use Old Town Hall as library space</li> <li>• Maker space/art space</li> <li>• STEM programming</li> <li>• New book clubs (nonfiction, literary, short stories, graphic novels, etc.)</li> <li>• More art classes</li> <li>• Comic book artist demos</li> <li>• Podcast workshops</li> <li>• Weekend hours year round</li> <li>• More evening hours</li> <li>• Have seniors read to kids</li> <li>• More opportunities for people to connect</li> <li>• Expand Library of Things</li> <li>• Multigenerational events: teens can help the grandparents with technology, games where everyone can participate</li> <li>• Have local historians come in and talk about things like the Salem witch trials, pilgrims, etc.</li> <li>• Intergenerational events like game nights or discussions on local politics/civics</li> <li>• Use people in the community and have them tell their diverse stories/share their special knowledge; use these people as community resources building a “human library”</li> <li>• A collection of oral histories of West Newbury to create audible record of what the past was like</li> <li>• Popup library to visit Page School and other locations regularly</li> <li>• Work to enhance the curriculum at the local schools</li> <li>• Educate/inform residents about household/local ways to make a difference (rooftop solar, energy efficiency improvements, alternatives to commuting, and minimizing auto emissions at the household level through electric/hybrid vehicles and other choices)</li> <li>• Continued/enhanced partnership with Historical Society for programming</li> <li>• Add local books to Overdrive</li> <li>• Library grounds as rental for events</li> <li>• Expand parking</li> </ul>

	<ul style="list-style-type: none"> <li>• Explore Old Town Hall</li> <li>• Murals</li> <li>• Add elevator</li> <li>• Books organized by subject</li> <li>• Redesigned circulation area to include self-checkout</li> <li>• Library on wheels</li> <li>• Food trucks visiting the library</li> <li>• Musical events</li> <li>• Discussion groups</li> <li>• Coordinate with the local cable access</li> <li>• Teen Room revamp</li> <li>• Expand teen programming</li> <li>• Popcorn and ice cream in the courtyard</li> <li>• Teach students about local elections and how to get involved or prepare for public service</li> <li>• More quiet space</li> <li>• Expand way library is used to increase use and purpose</li> </ul>
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## Strategic Planning Committee Meeting 2

Based on the results of the survey and first meeting, we defined five focus areas that continually came up as priorities and then developed strategies for meeting these concerns. Following this, we developed corresponding goals and objectives for the Library to focus on in the next five years.

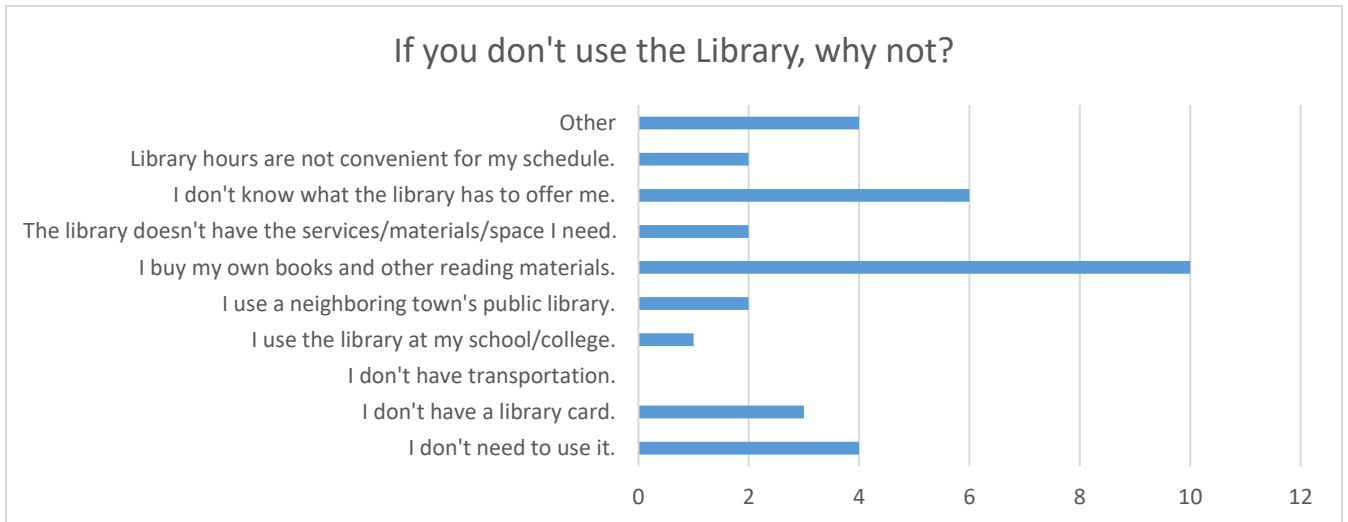
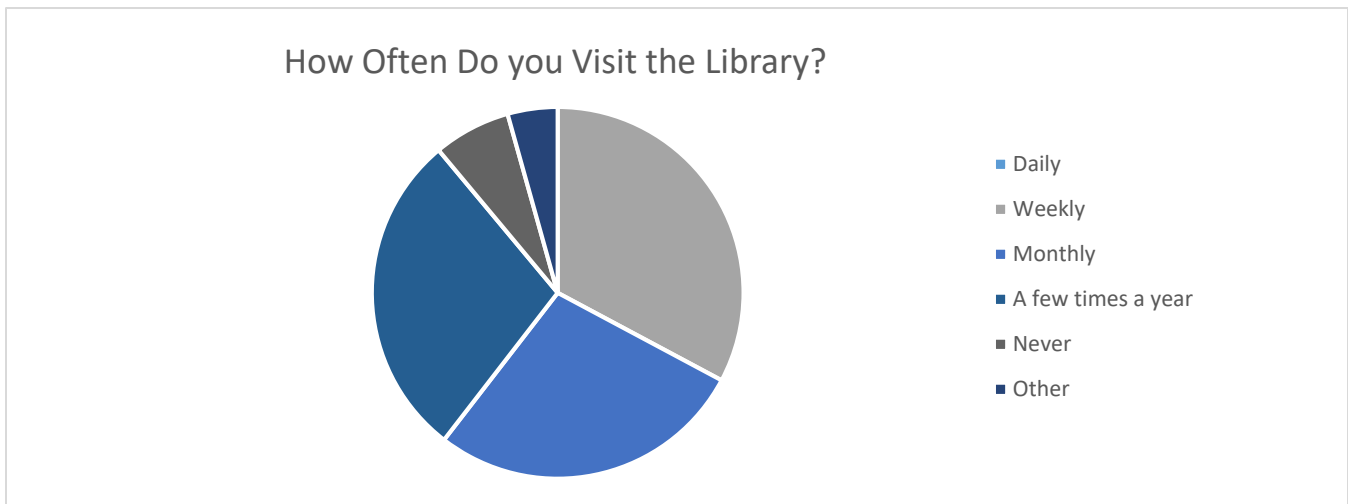
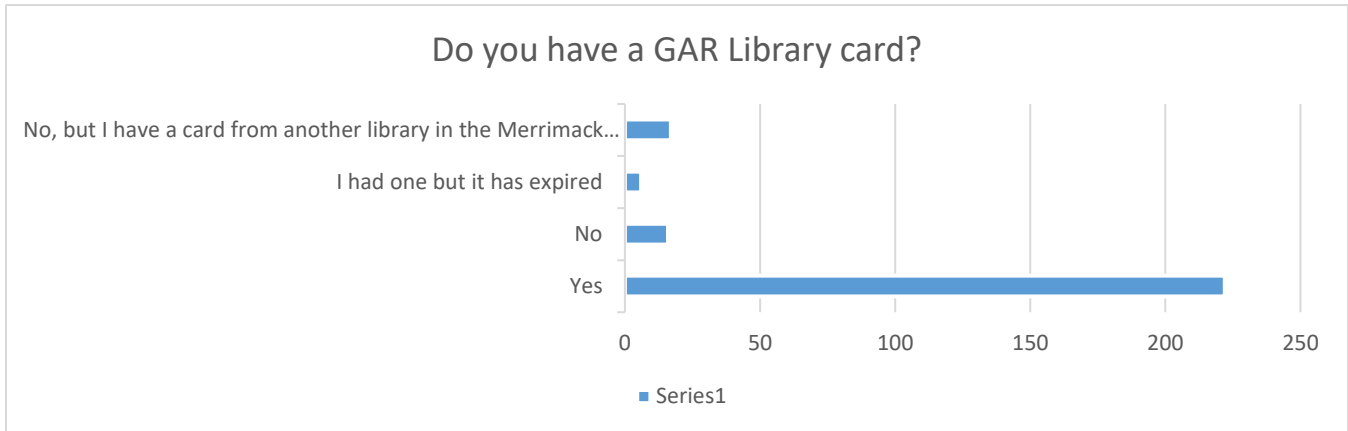
Focus Areas	Strategies
Community/Schools	<ul style="list-style-type: none"> <li>• Program for meeting new residents</li> <li>• Delivery for disabled people or those who have no transportation</li> <li>• Role of the community library being enlarged to include the “culture” of this community</li> <li>• More opportunities for people to connect</li> <li>• Use people in the community and have them tell their diverse stories/share their special knowledge; use these people as community resources building a “human library”</li> <li>• Oral history project to create audible record of what the past was like</li> <li>• Popup library to visit Page School and other locations regularly</li> <li>• Work to enhance the curriculum at the local schools</li> <li>• Educate/inform residents about household/local ways to make a difference (rooftop solar, energy efficiency improvements, alternatives to commuting, and minimizing auto emissions at the household level through electric/hybrid vehicles and other choices).</li> <li>• Collaborate with Historical Society for programming</li> <li>• Coordinate with the local cable access to offer workshops for kids</li> <li>• Teach students about local elections and how to get involved or prepare for public service</li> </ul>

Information/Collections/Local History	<ul style="list-style-type: none"> <li>• Better marketing to promote its assets—especially online resources—to the public</li> <li>• Better storage and access to local history items</li> <li>• Books organized by subject</li> <li>• Expanded Overdrive/ebook collection</li> <li>• Expanded new book collection</li> <li>• Add local history books to Overdrive</li> </ul>
Building/Grounds	<ul style="list-style-type: none"> <li>• Better utilization of outdoor space</li> <li>• Add a café</li> <li>• Add a meeting room</li> <li>• Add quiet study spaces / work rooms / remote workstations</li> <li>• Be a charging/cooling station</li> <li>• Use Old Town Hall as additional library space</li> <li>• Library grounds as rental for events</li> <li>• Expand parking</li> <li>• Murals</li> <li>• Add elevator</li> <li>• Redesigned circulation area</li> <li>• Teen Room revamp</li> <li>• More quiet space</li> <li>• Add a reading garden</li> </ul>
Programming	<ul style="list-style-type: none"> <li>• Offer a video game area</li> <li>• STEM programming</li> <li>• New book clubs (nonfiction, literary, short stories, graphic novels, etc.)</li> <li>• More art classes</li> <li>• Comic book artist demos</li> <li>• Podcast workshops</li> <li>• Have seniors read to kids</li> <li>• Multigenerational events: teens can help the grandparents with technology, games where everyone can participate.</li> <li>• Have local historians come in and talk about things like the Salem witch trials, pilgrims, etc.</li> <li>• Intergenerational events like game nights or discussions on local politics/civics</li> <li>• Food trucks visiting the library</li> <li>• Musical events</li> <li>• Discussion groups</li> <li>• Expand teen programming</li> <li>• Popcorn and ice cream in the courtyard</li> </ul>
Services	<ul style="list-style-type: none"> <li>• Weekend hours year round</li> <li>• More evening hours</li> <li>• Library on wheels</li> <li>• Staff recommendations</li> <li>• Expand Library of Things to include farming/gardening tools</li> <li>• Self-checkout</li> <li>• Create a maker space/art space</li> </ul>

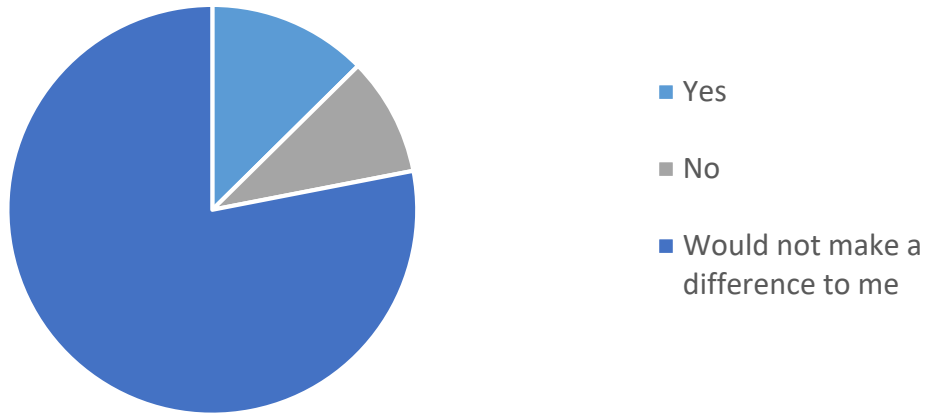
# Survey Results

## G.A.R. Memorial Library Strategic Planning Survey Results

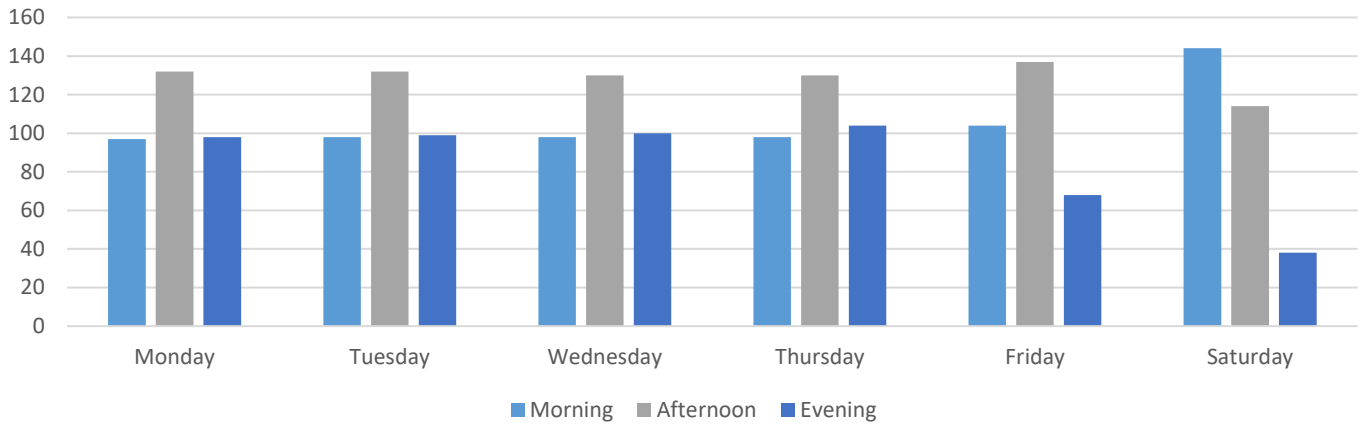
281 Total Responses



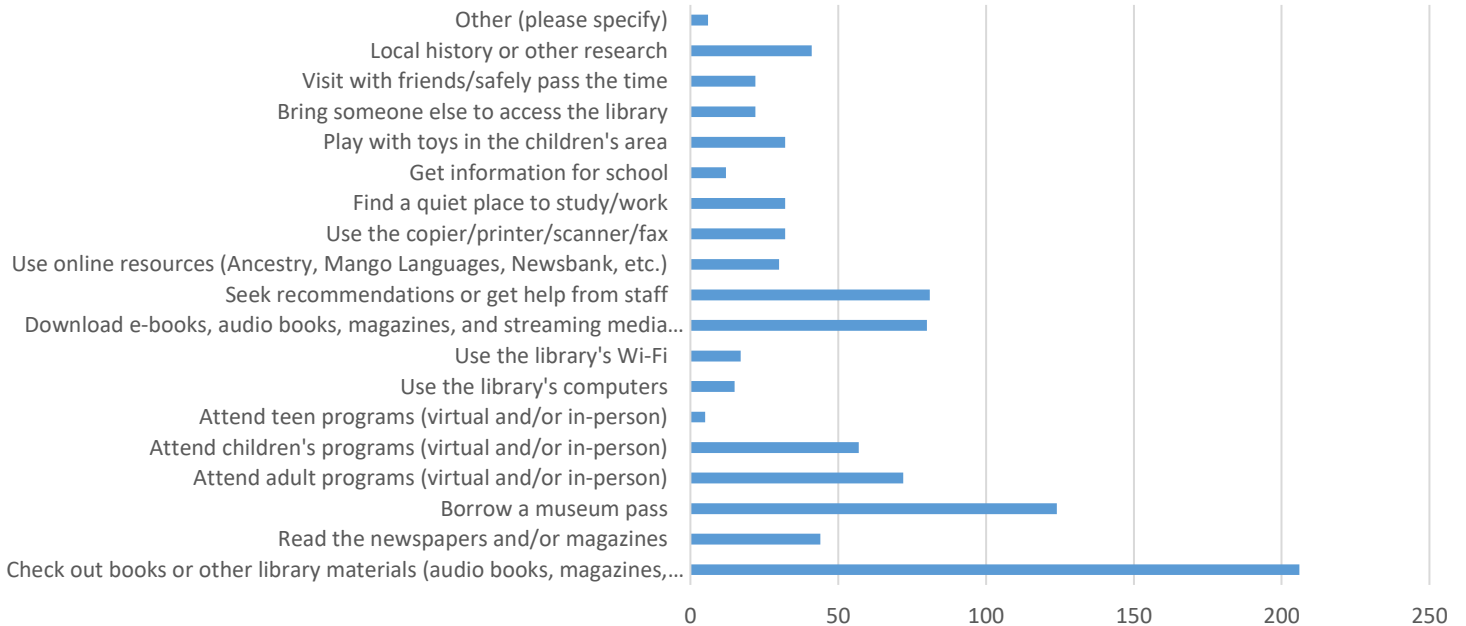
### Prefer the Library open at 9am?



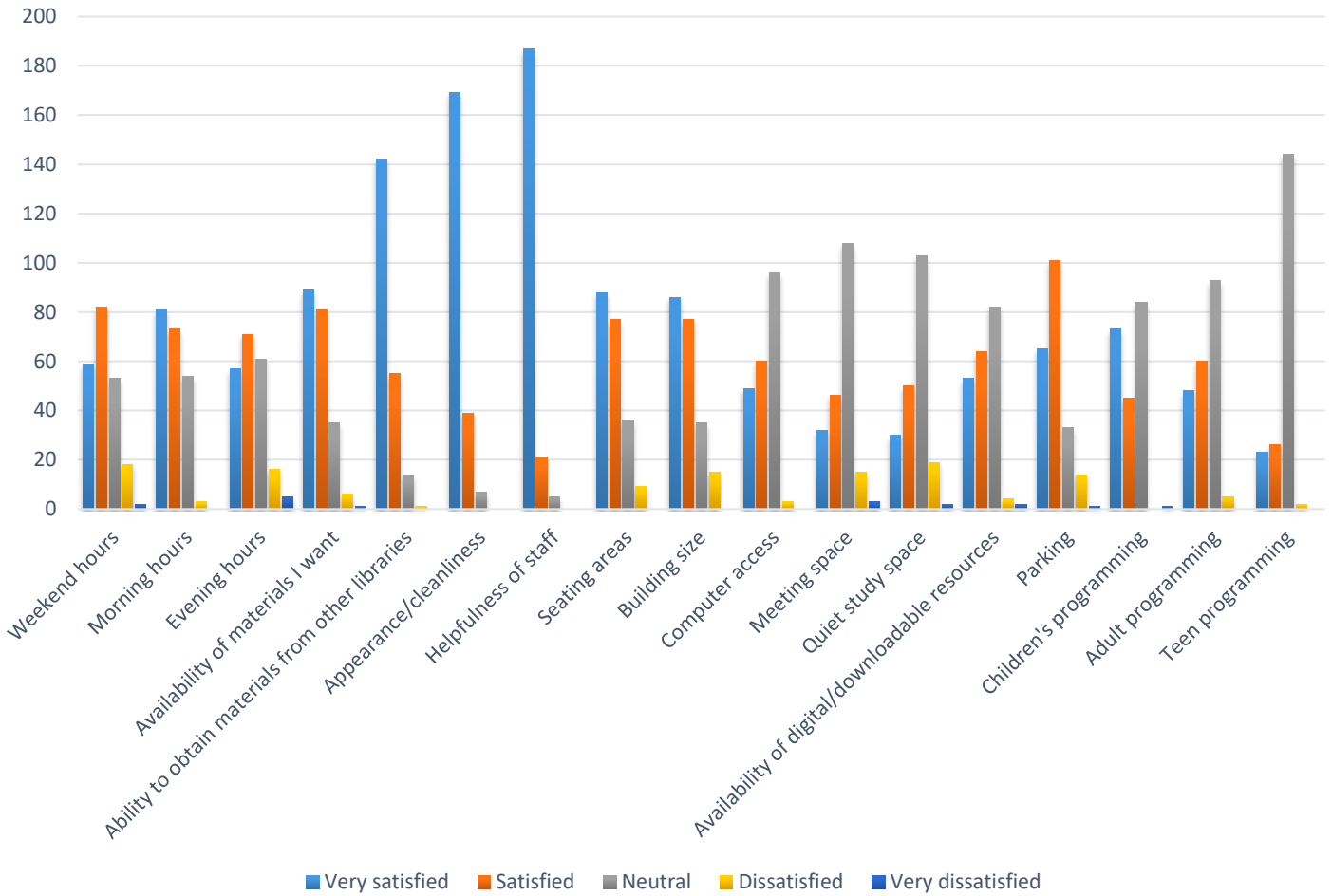
### Which open hours would be the most valuable to you?



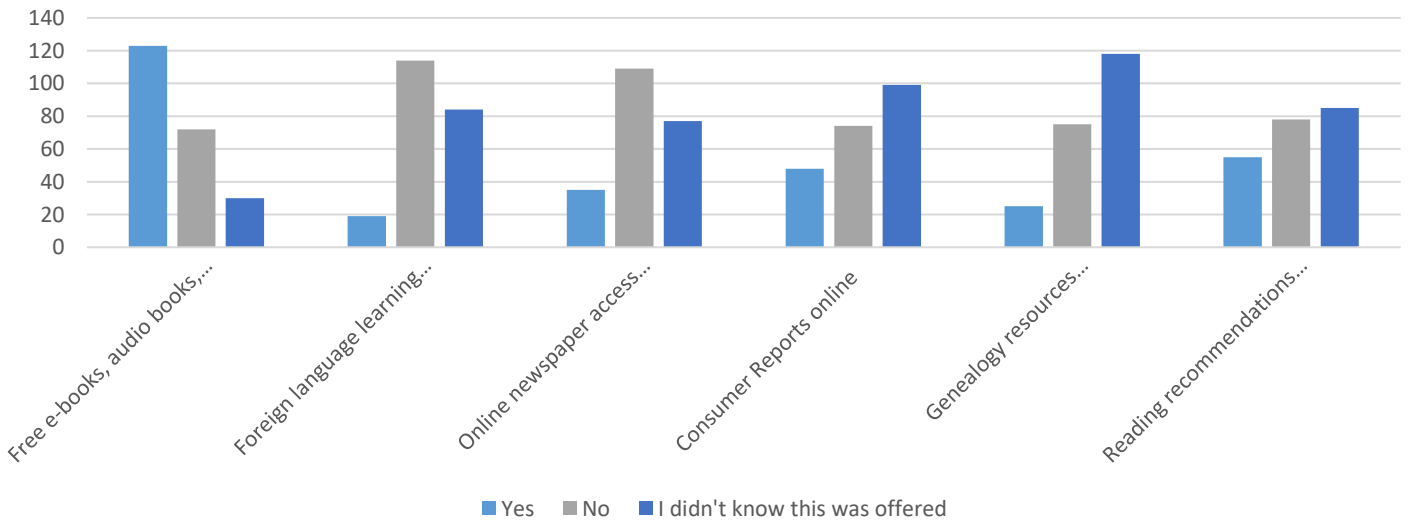
### Main Reasons For Using Library



## How would you evaluate the library's services in the following areas?

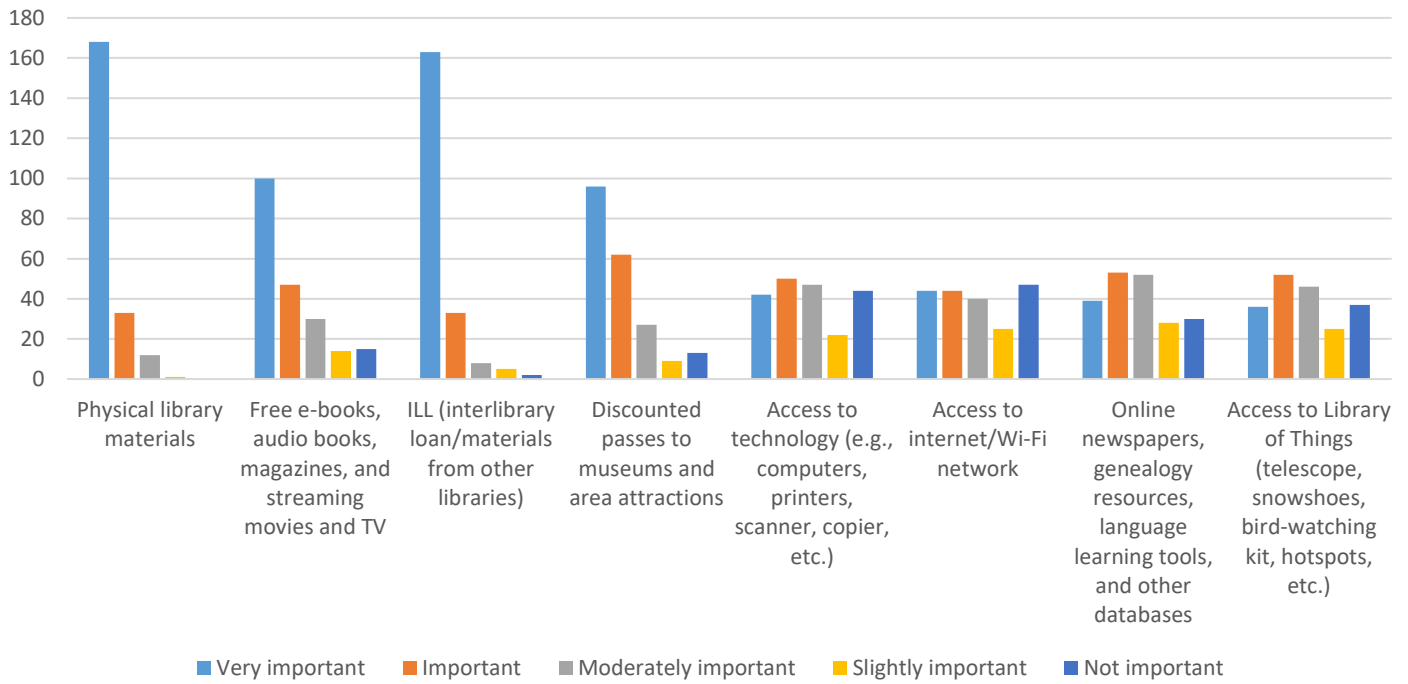


## Do you use the following digital library resources?

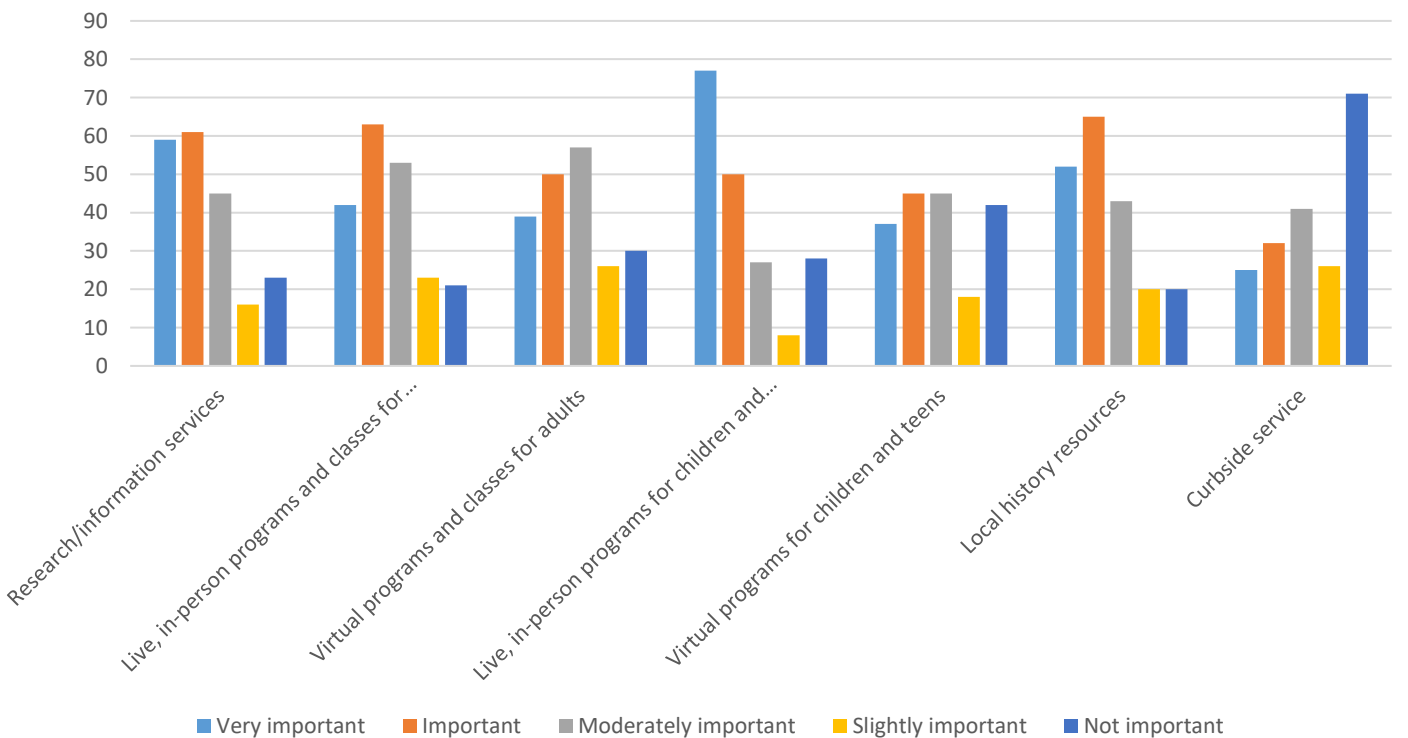




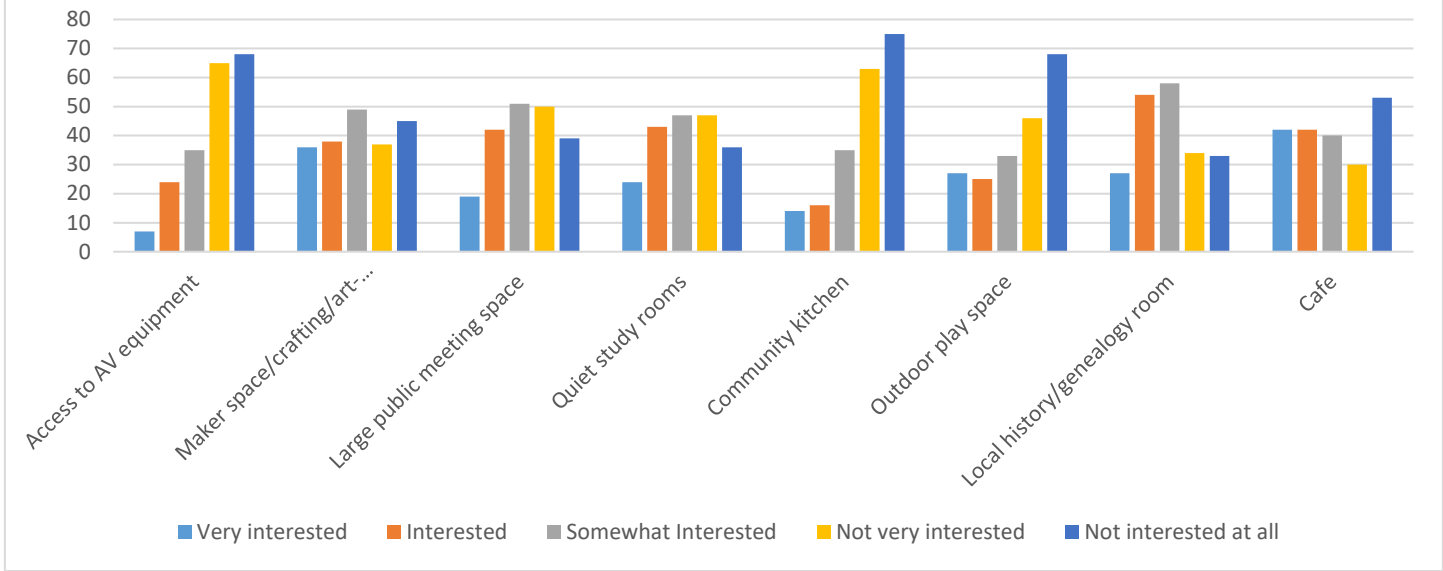
### How important are these library services to you?



### How important are these library services to you?

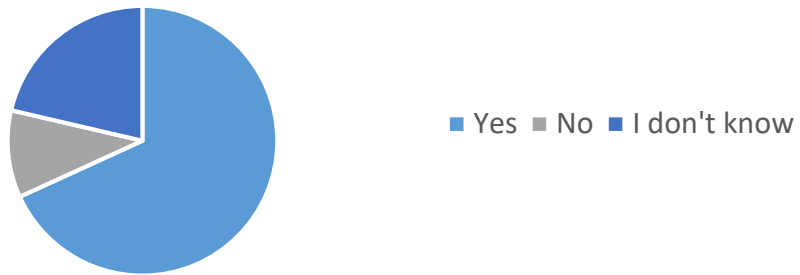


The library currently does not offer the following services. Please indicate your interest in the following:

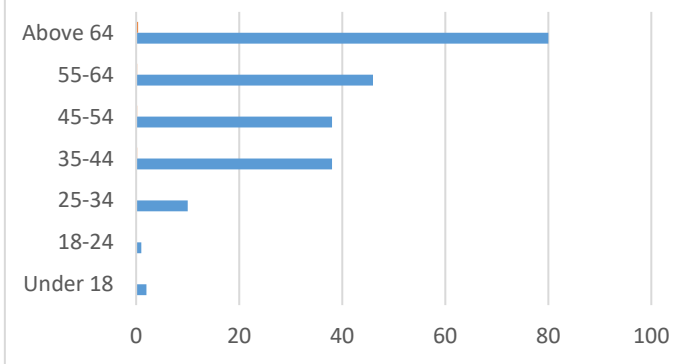


Do you support having the Town investigate the feasibility of renovating a portion of the Old Town Hall (491 Main Street) to create a large library meeting space, small study rooms, and a local history archive?

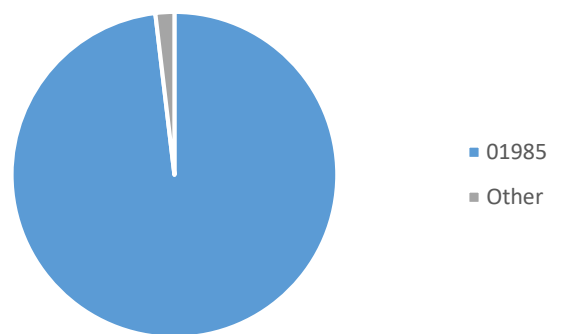
Do You Support a Feasibility Study of Old Town Hall?



Age?



What Is Your Zip Code?



**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**B**

**APPLICATION FOR PROJECT ELIGIBILITY**

This application may be completed electronically and emailed to [cpc@wnewbury.org](mailto:cpc@wnewbury.org) or printed and completed by hand and submitted to the CPC Administrator. All applications must be received by the CPC Office at least 2 weeks prior to a scheduled meeting in order to be considered by the Committee. For more information contact 978-363-1100 X131.

**APPLICANT INFORMATION:**

Project Name:	Affordable Housing Trust Initial and Annual Transfer
Project Address:	n/a
Map/Lot:	n/a
Applicant Name: (Group or Committee Affiliation)	West Newbury Select Board
Contact Person:	Angus Jennings, Town Manager
Telephone:	978-363-1100 x111
Address:	Town Office Building 381 Main Street West Newbury, MA
Email:	townmanager@wnewbury.org
Date of Application:	January 10, 2023

**COMMUNITY PRESERVATION CATEGORY:** *(Consult guidelines on following page and check all that apply)*

- |                                     |   |
|-------------------------------------|---|
| <input type="checkbox"/>            | Open Space  |
| <input type="checkbox"/>            | Recreation  |
| <input type="checkbox"/>            | Historic Preservation   |
| <input type="checkbox"/>            | <ul style="list-style-type: none"> <li>• Eligible/On State Registry</li> </ul>        |
| <input type="checkbox"/>            | <ul style="list-style-type: none"> <li>• Designated by Historic Commission</li> </ul> |
| <input checked="" type="checkbox"/> | Community Housing   |

**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT ELIGIBILITY**

CPA ELIGIBILITY REQUIREMENTS				
	Open Space	Recreation	Historic	Housing
<b>Acquire</b>	Yes	Yes	Yes	Yes
<b>Create</b>	Yes	Yes	No	Yes
<b>Preserve</b>	Yes	Yes	Yes	Yes
<b>Support</b>	No	No	No	Yes
<b>Rehabilitate and/or Restore</b>	Yes, if acquired or created with CPA funds	Yes (New 7/8/2012)	Yes	Yes If acquired or created with CPA funds
Adapted from "Recent Developments in Municipal Law", Massachusetts Department of Revenue, October 2012				

**General Criteria**

The Community Preservation Committee will give preference to proposals which address as many of the following general criteria as possible:

- Are consistent with the planning documents that have received wide scrutiny, public input and have been adopted by the Town such as the Open Space and Recreation Plan, Capital Improvement Plan and Master Plan;
- Preserve and enhance the character of the town;
- Save resources that would otherwise be threatened;
- Serves a currently under-served population;
- Either serve more than one CPA purpose (especially in linking open space, recreation and community housing) or demonstrate why serving multiple needs is not feasible;
- Demonstrate practicality and feasibility; demonstrate that the project can be implemented expeditiously and within budget;
- Produce an advantageous cost/benefit value;
- Leverage additional public and/or private funds;
- Preserve or utilize current town-owned assets; and
- Receive endorsement by other municipal boards or departments as well as community groups.

**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT ELIGIBILITY**

**PROJECT DESCRIPTION:**

<p>Provide a description of the project:</p> <p>The Select Board requests that the remaining balance of the CPA Community Housing Reserve, as well as the FY 2023 distribution to this reserve, be transferred to the newly formed Affordable Housing Trust.</p>
<p>How is this project consistent with the goals of the CPA?</p> <p>These funds will be used to support efforts to Acquire, Create, Preserve and Support Affordable Housing in West Newbury. All such uses will be in accordance with CPA requirements and the CPC/Affordable Housing Trust Grant Agreement (currently being drafted).</p>
<p>What is the intended timeline of the project?</p> <p>April 24, 2023 Annual Town Meeting</p>

**FUNDING:**

Estimated funding needed for this project:	\$
CP funding requested:	\$ 225,000 (estimated)

**OTHER:**

<p>Please attach any other information which you think would be useful for the CPC to consider when evaluating this project's eligibility for funding.</p>
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**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT FUNDING**

This application may be completed electronically and emailed to [cpc@wnewbury.org](mailto:cpc@wnewbury.org) or printed and completed by hand and submitted to the CPC Administrator. All applications must be received by the CPC Office at least 2 weeks prior to a scheduled meeting in order to be considered by the Committee. For more information contact 978-363-1100 X131.

**APPLICANT INFORMATION**

Project Name:	Affordable Housing Trust Initial and Annual Transfer
Project Address:	n/a
Map/Lot:	n/a
Applicant Name: (Group or Committee Affiliation)	West Newbury Select Board
Contact Person:	Angus Jennings, Town Manager
Telephone:	978-363-1100 x111
Address:	Town Office Building 381 Main Street West Newbury, MA
Email:	townmanager@wnewbury.org
Date of Application:	January 10, 2023

**PROJECT ELIGIBILITY**

Community Preservation Category (ies)	Community Housing
Date Approved by CPC	

**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT FUNDING**

**PROJECT NARRATIVE**

Provide information for the following project components, providing attachments where necessary which clearly reference the heading. All project components listed must be addressed in order for the project to be considered by the CPC.

**PROJECT SUMMARY** - Provide a description of the Project, including the property involved and its proposed use.

The Select Board requests that the remaining balance of the CPA Community Housing Reserve, as well as the FY 2023 distribution to the reserve, be transferred to the newly formed Affordable Housing Trust. These funds will be used to support efforts to Acquire, Create, Preserve and Support Affordable Housing in West Newbury. All such uses will be in accordance with CPA requirements and the CPC/Affordable Housing Trust Grant Agreement (currently being drafted).

**PUBLIC BENEFIT** – Describe in detail the benefits West Newbury will receive from the Project and how the Project meets the Community Preservation Committee’s Project Evaluation Criteria.

Use of these funds will benefit residents in need of affordable housing in West Newbury.

**CONTROL OF SITE** - Indicate whether the applicant owns or has a purchase agreement for the Project site. If the property is under agreement, include a description of the agreement and the timing and conditions of the purchase. If the applicant does not have site control, explain how the project will go forward.

n/a

**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT FUNDING**

**FEASIBILITY** - List all steps that may be required for completion of the Project, such as environmental assessment, zoning or other approvals, agreement on terms of any required conservation, affordability or historic preservation restrictions, and any other known issues. For projects that may affect abutters or the neighborhood, describe methods used to notify abutters of the proposal, and support or objections from those affected.

n/a

**SUPPORT** – Seek input from relevant Town entities and members of the community. Provide documentation of their response.

The Affordable Housing Trust supports this transfer request and is drafting a Grant Agreement that will outline the restrictions and potential uses of these funds.

**SCOPE OF WORK** - A scope of work is required to fully develop a time and cost plan for recommendation to Town Meeting. The scope is to be prepared by the Applicant and be detailed enough, in the opinion of the CPC, that a professional qualified to perform the work will be able to provide an estimate of the time and cost necessary to complete the proposed work. Attach the scope of work to this application.

n/a



**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT FUNDING**

<p><b>PROJECT TIMELINE</b> - Describe the anticipated steps or phases for completion of the Project. State whether the Project will be ready to proceed in the coming fiscal year. Will this be a multi-year project?</p> <p>n/a</p>							
<p><b>FUNDING</b> - Include a full budget, including itemization of major components and breakdown of construction costs. Describe The estimated annual cost of operating and maintaining the site/project after completion. Describe the basis for your budget and the sources of information you used.</p>							
<p>CPA Community Housing Balance:</p> <p>FY 2023 CPA Community Housing Allocation:</p> <p>Total:</p> <p>*Current as of 11/30/22</p>	<table style="width: 100%;"><tr><td style="width: 50%;"></td><td style="text-align: right;">\$ 172,174</td></tr><tr><td></td><td style="text-align: right;">\$</td></tr><tr><td></td><td style="text-align: right;">\$</td></tr></table>		\$ 172,174		\$		\$
	\$ 172,174						
	\$						
	\$						
<p><b>OTHER</b> - Please provide any other information which you think would be useful for the CPC to consider when evaluating this project's eligibility for funding (attach additional pages if needed):</p>							

**TOWN OF WEST NEWBURY  
COMMUNITY PRESERVATION COMMITTEE**

**APPLICATION FOR PROJECT FUNDING**

**APPLICATION CHECKLIST:**

To be completed by Applicant and approved by CPC Administrator prior to the application being reviewed by the CPC.

<b>Y</b>	<b>N/A</b>	<b>Application Requirement</b>
	X	Proof of ownership or control of the site, structure, or subject of Application.
	X	Proof of authorization by the public agency, board, committee, or any entity governed by a board, trustees, corporation etc., showing a vote by the entity to submit the Applications and take responsibility for the project.
	X	If the project involves public property, verification that the applicable public agency or department supports the project as presented and will oversee the project if funded.
	X	Assessor's map showing location of the Project.
	X	Photographs, including aerial photographs if available.
	X	Detailed scope of work for the project prepared by the Applicant.
	X	Recent cost and time to complete estimates from professionals qualified to complete the project.
	X	Proposed oversight and management plan for the Project.
	X	If the project involves a historic resource, evidence (date of listing on the state register or a letter from the West Newbury Historical Commission confirming its determination of significance) with the application that it meets these criteria.
	X	Architectural plans and specifications, for new construction or rehabilitation.
	X	Maps, renderings, site plans.
	X	Historic structures report, existing conditions report.
	X	Names and addresses of project architects, contractors and consultants.
	X	Documentation of support from Town entities and Community.
	X	Permission from the property owner to display a CPC funded project sign.

**Approval by CPC Administrator:**

Signature	
Date	

## Town Manager

---

**From:** Michael Dwyer <dwyer@westnewburysafety.org>  
**Sent:** Tuesday, December 6, 2022 8:22 AM  
**To:** Town Manager  
**Subject:** Re: SRO agreement

The agreement looks good. I do not have any comments or edits.

Thanks,  
Mike

---

**From:** Michael Dwyer <dwyer@westnewburysafety.org>  
**Date:** Monday, December 5, 2022 at 8:41 PM  
**To:** Town Manager <townmanager@wnewbury.org>  
**Subject:** Re: SRO agreement

Angus,

I will review it and get back to you. Manny reached out to me and due to scheduling changes, he will not be able to attend the select board meeting. That was the bad news. The good news is he completed the final required fitness tests today and passed beating all of his previous test results.

Thanks,  
Mike

---

**From:** Town Manager <townmanager@wnewbury.org>  
**Date:** Monday, December 5, 2022 at 3:33 PM  
**To:** Michael Dwyer <dwyer@westnewburysafety.org>  
**Subject:** Fwd: SRO agreement

Chief,

Please take a look. Let me know if you see items for update for a new agreement beginning 7/1/23. (I have this in Word and can send in editable format if you'd like).

I'd like to get this onto the Select Board agenda for either Jan 9 or Jan 16th.

Thanks,  
Angus

*Angus Jennings, Town Manager*  
Town of West Newbury  
Town Office Building  
[381 Main Street](#)  
[West Newbury, MA 01985](#)  
[\(978\) 363-1100 x111](#)  
[townmanager@wnewbury.org](mailto:townmanager@wnewbury.org)

Sent from my mobile device

Begin forwarded message:

**From:** "Bartholomew, Justin" <jbartholomew@prsd.org>  
**Date:** December 5, 2022 at 3:29:20 PM EST  
**To:** Town Manager <townmanager@wnewbury.org>  
**Cc:** Greg Labrecque <glabrecque@prsd.org>  
**Subject:** Re: SRO agreement

Hi Angus,

Attached is the signed MOU from 2020. I believe there have been some minor changes that Chief Dwyer will know about, but nothing significant. The financial part would still apply and we would continue to increase at 2.5%. Certainly happy to discuss further so that we can have a new MOU ready to go for 7/1/23.

Thanks again!  
~ Justin

On Wed, Nov 30, 2022 at 11:25 AM Town Manager <[townmanager@wnewbury.org](mailto:townmanager@wnewbury.org)> wrote:

Justin/Greg,

Wanted to get this item on your radar. The attached agreement had a max term of 3 years, so will need to be renewed for FY24 and beyond. I don't think we're envisioning any substantive changes; it could be we could just change the dates and re-approve/endorse – but I haven't talked this over w Chief Dwyer or the Select Board yet – I'll be surprised if this is anything other than a housekeeping exercise.

BTW, could you please send me a fully executed copy? This may be on file elsewhere, but I don't find that I have a digital copy.

Thanks,

Angus

--

Dr. Justin Bartholomew  
Pentucket Regional School District  
Superintendent of Schools  
22 Main Street  
West Newbury, MA 01985  
978.363.2280 x132

**Memorandum of Understanding  
Between  
Pentucket Regional School District  
and  
West Newbury Police Department**

This agreement (the “Agreement”) is made by and between Pentucket Regional School District (the “District”) and West Newbury Police Department (the “Police Department”) (collectively, the “Parties”). The Chief of Police of the Police Department (the “Chief”) and the Superintendent of the District (“the Superintendent”) are each a signatory to this Agreement. The provisions of this Agreement in **bold typeface** are specifically required by law under G.L. c. 71, § 37P.

**I. Purpose**

The purpose of this Agreement is to formalize and clarify the partnership between the District and the Police Department to implement a School Resource Officer (“SRO”) program (the “Program”) Pentucket Regional High and Middle Schools (the “School”) in order to promote school safety; help maintain a positive school climate for all students, families, and staff; enhance cultural understanding between students and law enforcement; promote school participation and completion by students; facilitate appropriate information-sharing; and inform the Parties’ collaborative relationship to best serve the school community.

This memorandum is not intended to, does not, and may not be relied upon to create any rights, substantive or procedural, enforceable by any person in any civil or criminal matter.

**II. Mission Statement, Goals, and Objectives**

The mission of the Program is to support and foster the safe and healthy development of all students in the District through strategic and appropriate use of law enforcement resources and with the mutual understanding that school participation and completion is indispensable to achieving positive outcomes for youth and public safety.

The Parties are guided by the following goals and objectives (the “Goals and Objectives”):

- To foster a safe and supportive school environment that allows all students to learn and flourish regardless of race, religion, national origin, immigration status, gender, disability, sexual orientation, gender identity, and socioeconomic status;
- To promote a strong partnership and lines of communication between school and police personnel and clearly delineate their roles and responsibilities;
- To establish a framework for principled conversation and decision-making by school and police personnel regarding student misbehavior and students in need of services;

- To ensure that school personnel and SROs have clearly defined roles in responding to student misbehavior and that school administrators are responsible for code of conduct and routine disciplinary violations;
- To minimize the number of students unnecessarily out of the classroom, arrested at school, or court-involved;
- To encourage relationship-building by the SRO such that students and community members see the SRO as a facilitator of needed supports as well as a source of protection;
- To provide requirements and guidance for training including SRO training required by law and consistent with best practices, and training for school personnel as to when it is appropriate to request SRO intervention;
- To outline processes for initiatives that involve the SRO and school personnel, such as violence prevention and intervention and emergency management planning; and
- To offer presentations and programming to the school focusing on criminal justice issues, community and relationship building, and prevention, health, and safety topics.

### III. Structure and Governance

The Parties acknowledge the importance of clear structures and governance for the Program. The Parties agree that communicating these structures to the school community, including teachers and other school staff, students, and families, is important to the success of the Program.

#### A. Process for Selecting SRO

The Parties acknowledge that the selection of the SRO is a critical aspect of the Program and that it is important for the Parties and the school community to have a positive perception of and relationship with the SRO.

**In accordance with state law, the Chief shall assign an officer whom the Chief believes would foster an optimal learning environment and educational community and shall give preference to officers who demonstrate the requisite personality and character to work in a school environment with children and educators and who have received specialized training in child and adolescent cognitive development, de-escalation techniques, and alternatives to arrest and diversion strategies.** The Chief shall work collaboratively with the Superintendent in identifying officers who meet these criteria and in selecting the officer who is ultimately assigned as the SRO.

The Chief shall consider the following additional factors in the selection of the SRO:

- Proven experience working effectively with youth;
- Demonstrated ability to work successfully with a population that has a similar racial and ethnic makeup and language background as those prevalent in the student body, as well as with persons who have physical and mental disabilities;

- Demonstrated commitment to making students and school community members of all backgrounds feel welcomed and respected;
- Demonstrated commitment to de-escalation, diversion, and/or restorative justice, and an understanding of crime prevention, problem-solving, and community policing in a school setting;
- Knowledge of school-based legal issues (e.g., confidentiality, consent), and demonstrated commitment to protecting students' legal and civil rights;
- Knowledge of school safety planning and technology;
- Demonstrated commitment and ability to engage in outreach to the community;
- Knowledge of school and community resources;
- A record of good judgment and applied discretion, including an absence of validated complaints and lawsuits; and
- Public speaking and teaching skills.

In endeavoring to assign an SRO who is compatible with the school community, the Chief shall receive and consider input gathered by the Superintendent from the school principal(s) and representative groups of teachers, parents, and students, in addition to the Superintendent. **In accordance with state law, the Chief shall not assign an SRO based solely on seniority.**

The Chief shall take into account actual or apparent conflicts of interest, including whether an officer is related to a current student at the school to which the officer may be assigned as an SRO. As part of the application process, officers who are candidates for an SRO position shall be required to notify the Chief about any relationships with current students or staff members or students or staff members who are expected to join the school community (e.g., children who are expected to attend the school in the coming years). Any SRO who has a familial or other relationship with a student or staff member that might constitute an actual or apparent conflict of interest shall be required to notify his or her appointing authority at the earliest opportunity. The Police Department shall determine the appropriate course of action, including whether to assign another officer to respond to a particular situation, and will advise the SRO and the District accordingly. Nothing in this paragraph is intended to limit the ability of the SRO to respond to emergency situations in District schools.

## **B. Supervision of SRO and Chain of Command**

The SRO shall be a member of the Police Department and report directly to the West Newbury Police Chief. To ensure clear and consistent lines of communication, the SRO shall meet at least monthly with the principal and any other school officials identified in Section V.A. The SRO shall ensure that the principal remains aware of material interactions and information involving the SRO's work, including, but not limited to, arrests and searches of students' persons and property, consistent with Section V.D.

### **C. Level and Type of Commitment from Police Department and School District**

The salary and benefits of the SRO shall be covered by the Town of West Newbury. In order to defray the costs, the Pentucket Regional School District shall pay the Town of West Newbury the sum of \$30,000.00 for Fiscal Year 2021.

If this agreement is extended pursuant to Section IX herein, the amount of such payment shall increase in each of the subsequent fiscal years by 2.5%, or such greater annual cost of living adjustment as may be contractually obligated pursuant to a Collective Bargaining Agreement between the Town of West Newbury and Teamsters Chauffeurs & Helpers, West Newbury Police Department, Union Local #170. The costs of the training required by this Agreement and any other training or professional development shall be paid by the Town of West Newbury.

The Pentucket Regional School Districts agrees to provide the SRO with a private, appropriately furnished office at the High School which can be secured. This shall include, but is not limited to, a desk with drawers, chairs, filing cabinet for files and records that can be properly locked and secured, as well as a telephone and computer.

### **D. Integrating the SRO**

The Parties acknowledge that proper integration of the SRO can help build trust, relationships, and strong communication among the SRO, students, and school personnel.

The District shall be responsible for ensuring that the SRO is formally introduced to the school community, including students, parents, and staff. The introduction shall include information about the SRO's background and experience, the SRO's role and responsibilities, what situations are appropriate for SRO involvement, and how the SRO and the school community can work together, including how and when the SRO is available for meetings and how and when the school community can submit questions, comments, and constructive feedback about the SRO's work. The introduction for parents shall include information on procedures for communicating with the SRO in languages other than English. The SRO shall also initiate communications with students and teachers to learn their perceptions regarding the climate of their school.

The SRO shall regularly be invited to and attend staff meetings, assemblies, and other school convenings. The SRO shall also be invited to participate in educational and instructional activities, such as instruction on topics relevant to criminal justice and public safety issues. If the District has access to a student rights training through a community partner or the District Attorney's Office, the school shall consider offering such a training to students, where practicable, at the start of each school year. The SRO shall make reasonable efforts to attend such training. The SRO shall not be utilized for support staffing, such as hall monitor, substitute teacher, or cafeteria duty.

The Parties acknowledge that the SRO may benefit from knowledge of accommodations or approaches that are required for students with mental health, behavioral, or emotional



concerns who have an individualized education program (“IEP”) under the Individuals with Disabilities Education Act or a plan under Section 504 of the Rehabilitation Act (“504 Plan”). School personnel shall notify parents or guardians of such students of the opportunity to offer the SRO access to the portions of the IEP document or 504 Plan that address these accommodations or approaches. It is within the sole discretion of the parents or guardians to decide whether to permit the SRO to review such documents. If a parent or guardian provides such permission, the SRO shall make reasonable efforts to review the documents. Whenever possible, the school shall make available a staff member who can assist the SRO in understanding such documents.

The SRO shall participate in any District and school-based emergency management planning. The SRO shall also participate in the work of any school threat assessment team to the extent any information sharing is consistent with obligations imposed by the Family Educational Rights and Privacy Act (“FERPA”) (20 U.S.C. § 1232g) (see further information in Section V).

#### **E. Complaint Resolution Process**

The Parties shall develop and implement a simple and objective complaint resolution system for all members of the school community to register concerns that may arise with respect to the SRO or the Program. The system shall comply with Police Department policies and shall provide for timely communication of the resolution of the complaint to the complainant. The system shall also allow parents and guardians to submit complaints in their preferred language and in a confidential manner that protects the identity of the complainant from the SRO consistent with the SRO’s due process rights and any applicable employment protections.

All students, parents, guardians, teachers, and administrators shall be informed of the complaint resolution system and procedures at the beginning of each school year.

The Parties shall develop and implement a system that allows for the SRO and other Police Department officers to register concerns, including concerns about misconduct by teachers or administrators, that may arise with respect to the Program.

#### **F. Annual Review of the SRO and the SRO Program**

**In accordance with state law, the Chief and the Superintendent shall annually review the performance of the SRO and the success and effectiveness of the Program in meeting the Goals and Objectives.** The review shall be conducted at the end of each school year in a meeting among the SRO, the Chief, and the Superintendent. Notice of the time and place of the review shall be provided to the West Newbury Town Manager at least one week prior, and the Town Manager shall be provided the opportunity to attend the review at his/her option. A copy of the review shall be supplied to each attendee.

The Chief and Superintendent shall jointly develop and agree in advance on the metrics for measuring the SRO's performance and the success and effectiveness of the Program. The review shall include measures that reward the SRO's performance, subject to the terms of any applicable collective bargaining agreements, for compliance with the terms of this Agreement and the SRO's contributions to achieving the mission, purpose, goals, and objectives as set forth in Sections I and II. The review shall consider SRO efforts to prevent unnecessary student arrests, citations, court referrals, and other use of police authority. The review shall also assess the extent of the SRO's positive interactions with students, families, and staff and the SRO's participation in collaborative approaches to problem-solving, prevention, and de-escalation.

The Chief and Superintendent shall provide a mechanism for receiving feedback from the school community, including principal(s), teachers, students, and families of the school(s) to which the SRO is assigned. The Chief shall seriously consider any such feedback and shall make a good faith effort to address any concerns raised; however, the final selection and assignment of the SRO shall be within the sole discretion of the Chief. If the Superintendent recommends that the SRO not be assigned to a specific school, the Chief shall provide an explanation of any decision to maintain the SRO's assignment.

#### **IV. Roles and Responsibilities of the SRO and School Administrators and Staff in Student Misbehavior**

The Parties agree that school officials and the SRO play important and distinct roles in responding to student misbehavior to ensure school safety and promote a positive and supportive learning environment for all students.

**Under state law, the SRO shall not serve as a school disciplinarian, as an enforcer of school regulations, or in place of school-based mental health providers, and the SRO shall not use police powers to address traditional school discipline issues, including non-violent disruptive behavior.**

The principal or his or her designee shall be responsible for student code of conduct violations and routine disciplinary violations. The SRO shall be responsible for investigating and responding to criminal misconduct. The Parties acknowledge that many acts of student misbehavior that may contain all the necessary elements of a criminal offense are best handled through the school's disciplinary process. The SRO shall read and understand the student code of conduct for both the District and the school.

The principal (or his or her designee) and the SRO shall use their reasoned professional judgment and discretion to determine whether SRO involvement is appropriate for addressing student misbehavior. In such instances, the guiding principle is whether misbehavior rises to the level of criminal conduct that poses (1) real and substantial harm or threat of harm to the physical or psychological well-being of other students, school personnel, or members of the community or (2) real and substantial harm or threat of harm to the property of the school.

In instances of student misbehavior that do not require a law enforcement response, the principal or his or her designee shall determine the appropriate disciplinary response. The principal or his or her designee should prioritize school- or community-based accountability programs and services, such as peer mediation, restorative justice, and mental health resources, whenever possible.

For student misbehavior that requires immediate intervention to maintain safety (whether or not the misbehavior involves criminal conduct), the SRO may act to deescalate the immediate situation and to protect the physical safety of members of the school community. To this end, school personnel may request the presence of the SRO when they have a reasonable fear for their safety or the safety of students or other personnel.

When the SRO or other Police Department employees have opened a criminal investigation, school personnel shall not interfere with such investigation or act as agents of law enforcement. To protect their roles as educators, school personnel shall only assist in a criminal investigation as witnesses or to otherwise share information consistent with Section V, except in cases of emergency. Nothing in this paragraph shall preclude the principal or his or her designee from undertaking parallel disciplinary or administrative measures that do not interfere with a criminal investigation.

A student shall only be arrested on school property or at a school-related event as a last resort or when a warrant requires such an arrest. The principal or his or her designee shall be consulted prior to an arrest whenever practicable, and the student's parent or guardian shall be notified as soon as practicable after an arrest. In the event of an investigation by the SRO that leads to custodial questioning of a juvenile student, the SRO shall notify the student's parent or guardian in advance and offer them the opportunity to be present during the interview.

**In accordance with state law, the SRO shall not take enforcement action against students for Disturbing a School Assembly (G.L. c. 272, § 40) or for Disorderly Conduct or Disturbing the Peace (G.L. c. 272, § 53) within school buildings, on school grounds, or in the course of school-related events.**

It shall be the responsibility of the District to make teachers and other school staff aware of the distinct roles of school administration and SROs in addressing student misbehavior, consistent with this Section and this Agreement, as well as the Standard Operating Procedures accompanying this Agreement and described in Section VIII.

#### **V. Information Sharing Between SROs, School Administrators and Staff, and Other Stakeholders**

The Parties acknowledge the benefit of appropriate information sharing for improving the health and safety of students but also the importance of limits on the sharing of certain types of student information by school personnel. The Parties also acknowledge that there is a distinction between student information shared for law enforcement purposes and

student information shared to support students and connect them with necessary mental health, community-based, and related services.

#### **A. Points of Contact for Sharing Student Information**

In order to facilitate prompt and clear communications, the Parties acknowledge that the Pentucket High School Principal (or his or her designee) and the SRO are the primary points of contact for sharing student information in accordance with this Agreement. The Parties also acknowledge that, in some instances, other school officials or Police Department employees may serve as key points of contact for sharing information. Such school officials and Police Department employees are identified below:

Chief of Police  
Pentucket High School Assistant Principal  
Pentucket Middle School Principal

Such Police Department employees are considered a part of the District's "Law Enforcement Unit" as defined in the Family Educational Rights and Privacy Act ("FERPA") (20 U.S.C. § 1232g).

#### **B. Compliance with FERPA and Other Confidentiality Requirements**

At all times, school officials must comply with FERPA. This federal statute permits disclosures of personally identifiable information about students contained in educational records ("Student PII"), without consent, only under specific circumstances.

When the District "has outsourced institutional services or functions" to the SRO consistent with 34 C.F.R. § 99.31(a)(1)(i)(B) of FERPA, the SRO qualifies as a "school official" who can access, without consent, Student PII contained in education records about which the SRO has a "legitimate educational interest."

Consistent with 34 C.F.R. §§ 99.31(10) and 99.36 of FERPA, the SRO (or other Police Department employee identified in Section V.A.) may gain access, without consent, to Student PII contained in education records "in connection with an emergency if knowledge of the Student PII is necessary to protect the health or safety of the student or other individuals."

These are the *only* circumstances in which an SRO may gain access, without consent, to education records containing Student PII (such as IEPs, disciplinary documentation created by a school, or work samples).

FERPA does not apply to communications or conversations about what school staff have observed or to information derived from sources other than education records.

In addition to FERPA, the Parties agree to comply with all other state and federal laws and regulations regarding confidentiality, including the Health Insurance Portability and

Accountability Act of 1996 (HIPAA) and state student record regulations at 603 C.M.R. 23.00. The Parties agree to collect only that student information necessary and relevant to fulfilling their respective roles, to share such information with each other only where required or allowed under this Agreement, and not to share such information beyond the sharing contemplated in this Agreement unless required to be shared by state or federal law. The Parties shall not collect or share information on a student's immigration status except as required by law.

## **C. Information Sharing by School Personnel**

### **1. For Law Enforcement Purposes**

Where the principal or his or her designee learns of misconduct by a student for which a law enforcement response may be appropriate (as described in Section IV), he or she should inform the SRO. If a teacher has information related to such misconduct, he or she may communicate this information directly to the SRO but should also communicate such information to the principal or his or her designee. The Parties agree that the sharing of such information shall not and should not necessarily require a law enforcement response on the part of the SRO but shall and should instead prompt a careful consideration of whether the misconduct is best addressed by law enforcement action, by a school disciplinary response, or by some combination of the two.

Notwithstanding the foregoing, if student information is obtained solely during a communication with school staff deemed privileged or confidential due to the staff member's professional licensure, such communication shall only be disclosed with proper consent or if the communication is subject to the limits and exceptions to confidentiality and is required to be disclosed (e.g., mandatory reporting, immediate threats of harm to self or others). Additionally, if such student information is gathered as part of a "Verbal Screening Tool for Substance Abuse Disorders," such information shall only be disclosed pursuant to the requirements of G.L. c. 71, § 97.

The Parties acknowledge that there may be circumstances in which parents consent to the disclosure of student information for law enforcement purposes (e.g., as part of a diversion program agreement) and that the sharing of information under such circumstances does not violate this Agreement.

The Parties also acknowledge that, from time to time, an emergency situation may arise that poses a real, substantial, and immediate threat to human safety or to property with the risk of substantial damage. School personnel having knowledge of any such emergency situation should immediately notify or cause to be notified both the Police Department (or the SRO if appropriate to facilitate a response) and the principal or his or her designee. This requirement is in addition to any procedures outlined in the school's student handbook, administrative manual, and/or School Committee policy manual.

Nothing in this section or this Agreement shall prevent the principal or his or her designee from reporting possible criminal conduct by a person who is not a student.

## **2. For Non-Law Enforcement Purposes**

Based on their integration as part of the school community, SROs may periodically require access to student information for purposes that fall outside of the SRO's law enforcement role outlined in Section IV.

Student PII received by the SRO (or other Police Department employee identified in Section V.A.) that is not related to criminal conduct risking or causing substantial harm shall not be used to take law enforcement action against a student but may be used to connect a student or family with services or other supports. Prior to such a disclosure, whenever possible, the principal or his or her designee shall notify the parent, the student, or both, when such information will be shared with the SRO.

## **D. Information Sharing by the SRO**

Subject to applicable statutes and regulations governing confidentiality, the SRO shall inform the principal or his or her designee of any arrest of a student, the issuance of a criminal or delinquency complaint application against a student, or a student's voluntary participation in any diversion or restorative justice program if:

- The activity involves criminal conduct that poses a (present or future) threat of harm to the physical or psychological well-being of the student, other students or school personnel, or to school property;
- The making of such a report would facilitate supportive intervention by school personnel on behalf of the student (e.g., because of the Police Department's involvement with a student's family, the student may need or benefit from supportive services in school); or
- The activity involves actual or possible truancy.

The SRO shall provide such information whether the activity takes place in or out of school, consistent with the requirements of G.L. c. 12, § 32 (Community Based Justice information-sharing programs) and G.L. c. 71, § 37H (setting forth potential disciplinary consequences for violations of criminal law).

When the SRO observes or learns of student misconduct in school for which a law enforcement response is appropriate (as described in Section IV), the SRO shall convey to the principal or his or her designee as soon as reasonably possible the fact of that misconduct and the nature of the intended law enforcement response, and when the SRO observes or learns of student misconduct that does not merit a law enforcement response, but that appears to violate school rules, the SRO shall report the misconduct whenever such reporting would be required for school personnel.

## **VI. Data Collection and Reporting**

**In accordance with state law, the SRO and school administrators shall work together to ensure the proper collection and reporting of data on school-based arrests, citations, and court referrals of students, consistent with regulations promulgated by the Department of Elementary and Secondary Education.**

## **VII. SRO Training**

**In accordance with state law, the SRO shall receive ongoing professional development in:**

- (1) child and adolescent development,**
- (2) conflict resolution, and**
- (3) diversion strategies.**

Additional areas for continuing professional development may include, but are not limited to:

- Restorative practices
- Implicit bias and disproportionality in school-based arrests based on race and disability
- Cultural competency in religious practices, clothing preferences, identity, and other areas
- Mental health protocols and trauma-informed care
- De-escalation skills and positive behavior interventions and supports
- Training in proper policies, procedures, and techniques for the use of restraint
- Teen dating violence and healthy teen relationships
- Understanding and protecting civil rights in schools
- Special education law
- Student privacy protections and laws governing the release of student information
- School-specific approaches to topics like bullying prevention, cyber safety, emergency management and crisis response, threat assessment, and social-emotional learning

The SRO shall also receive certified basic SRO training on how to mentor and counsel students, work collaboratively with administrators and staff, adhere to ethical standards around interactions with students and others, manage time in a school environment, and comply with juvenile justice and privacy laws, to the extent that such training is available.

The SRO shall attend a minimum of 12 hours of training per year.

Where practicable, the District shall also encourage school administrators working with SROs to undergo training alongside SROs to enhance their understanding of the SRO's role and the issues encountered by the SRO.

## VIII. Accompanying Standard Operating Procedures

**This Agreement shall be accompanied by Standing Operating Procedures that shall be consistent with this Agreement and shall include, at a minimum, provisions detailing:**

- **The SRO uniform** and any other ways of identifying as a police officer;
- Duty hours and scheduling for the SRO;
- **Use of police force, arrest, citation, and court referral on school property;**
- **A statement and description of students' legal rights, including the process for searching and questioning students and when parents and administrators must be notified and present;**
- **The chain of command, including delineating to whom the SRO reports, how often the SRO meets with the principal or his or her designee, and how school administrators and the SRO work together, as well as what procedure will be followed when there is a disagreement between the administrator and the SRO;**
- Protocols for SROs when school administrators, teachers, or other school personnel call upon them to intervene in situations beyond the role prescribed for them in Section IV;
- **Performance evaluation standards, which shall incorporate monitoring compliance with this Agreement and use of arrest, citation, and police force in school;**
- **Protocols for diverting and referring at-risk students to school- and community-based supports and providers; and**
- Clear guidelines on confidentiality and **information sharing between the SRO, school staff, and parents or guardians.**

## IX. Effective Date, Duration, and Modification of Agreement

This Agreement shall be effective as of the date of signing, for a term beginning July 1, 2020 and extending through June 30, 2021. However, the Agreement may be extended by up to two additional one-year terms commencing on July 1, 2021, and July 1, 2022, respectively. Any such extension term(s) shall be subject to approval by the Town of West Newbury, as authorized by its Board of Selectmen, and the Pentucket Regional School District, as authorized by its Superintendent. Either Participating Governmental Unit shall give notice in writing to the other at least ninety (90) days prior to the start of the fiscal year of whether or not it wishes to extend this initial term. Should the parties fail to extend this Agreement by written addendum hereto, the agreement shall terminate upon the last day of the then-current term.

This Agreement shall be reviewed annually prior to the start of the school year. This Agreement remains in full force and effect until amended or until such time as either of the Parties withdraws from this Agreement by delivering written notification to the other Party.



Upon execution of this Agreement by the Parties, a copy of the Agreement shall be placed on file in the offices of the Police Chief, the Superintendent, and the Town Manager. The Parties shall also share copies of this Agreement with the SRO, any principals in schools where the SRO will work, and any other individuals whom they deem relevant or who request it.

WITNESS our hands and seals as of the date first written above.

TOWN OF WEST NEWBURY

PENTUCKET REGIONAL SCHOOL DIST.



\_\_\_\_\_  
**Angus Jermings**  
Town Manager  
Duly authorized  
By 3-0 vote of the  
Board of Selectmen  
July 6, 2020



\_\_\_\_\_  
**Justin Bartholomew**  
Superintendent



**Town of West Newbury**  
381 Main Street  
West Newbury, Massachusetts 01985

Angus Jennings, Town Manager  
978-363-1100, Ext. 111 Fax 978-363-1826  
[townmanager@wnewbury.org](mailto:townmanager@wnewbury.org)

TO: Select Board  
FROM: Angus Jennings, Town Manager  
DATE: January 13, 2023  
RE: COVID-19 protocols

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As you know, the sunset date for the attached protocols was 12/31/22. An employee missed work days due to COVID in late December and in early January. The question has been presented as to whether the time missed after December 31<sup>st</sup> would count against the employee's accrued sick leave. The Board's policy direction is sought.

While I am not sure whether or how many responses we'll receive before Tuesday evening, we are making efforts to research whether other municipalities are continuing to exempt COVID-related leave from regular use of sick leave.



**Town of West Newbury**  
Employee COVID19 Exposure Protocol  
Updated July 25, 2022

This protocol reflects current OSHA, CDC and Massachusetts state guidance on protecting employees from exposure to COVID19 in the workplace. It is meant to be updated as new scientific information becomes available or regulatory requirements change.

Applicability

This protocol applies to employees with work spaces in the Town Offices (1910 Building), and those employees and contractors whose responsibilities include regular work in the Town Offices (i.e. Buildings & Grounds, IT vendor, Boards/Committees/Commissions, etc.).

Vaccination

All employees are strongly encouraged to be vaccinated against COVID19 infection, and if necessary may obtain vaccinations during normal working hours.

Hygiene, Face Masks and Distancing

In order to minimize COVID19 exposure, everyone entering Town buildings is advised to sanitize hands before and after touching surfaces used by others. Face masks and physical distancing (6') are not required. Employees may choose to wear face masks, and/or to maintain physical distancing from others, at their option. Upon request, the Town shall implement measures to demarcate physical distancing guides and reinforce safety of employee workspaces (i.e. installing Plexiglas).

COVID19 Symptoms

Any employee who experiences symptoms such as fever, fatigue, difficulty breathing, loss of taste or smell, cough, headache or nausea must notify their supervisor, and receive a COVID19 test (Antigen or PCR). The employee may not return to work until they are no longer symptomatic and a negative test result is received.

Isolation and Quarantine Guidelines

An employee who tests positive for COVID19 must notify their supervisor and the Town Manager or Town Accountant/Business Manager (or their supervisor may notify the Town Manager or Town Accountant/Business Manager on their behalf). Approval to return to work must be given by the Town Manager or the Town Accountant/Business Manager. Proof of a negative test result may be required, and if required would be treated as confidential and placed on file in the employee's personnel file.

The latest Quarantine and Isolation Guidelines issued by the Centers for Disease Control & Prevention (CDC) are appended to this Protocol, and are incorporated by reference.

Compensation During Time Off

Any employee who is required to isolate or quarantine in order to prevent exposing other employees or visitors to the Town Office Building to COVID19 will be paid for their normal work schedule, and the time taken will not draw from the employee's accrued sick time. They will be expected to fulfill position requirements remotely to

the maximum extent practicable while out of work, and may be asked to complete unrelated work assignments by their supervisor.

Non-Workplace Exposure

Town employees should be mindful of potential COVID19 exposure outside the workplace and follow recommended or required CDC, state and local protocols for travel, recreation and social events.

Sunset Date

This protocol, as may be amended by the Town Manager, shall be in effect through December 31, 2022, unless it is rescinded prior to that date, or unless the effective date is extended past that date by vote of the Select Board. If the protocol is amended by the Town Manager, prompt notice of any such amendments shall be provided to the Select Board and to personnel subject to the protocol.

*Date of adoption: November 15, 2021*

*Amended: December 20, 2021*

*Amended: February 16, 2022*

*Amended: April 12, 2022*

*Amended: July 26, 2022*

## When to Stay Home

### Calculating Quarantine

The date of your exposure is considered day 0. **Day 1 is the first full day after your last contact with a person who has had COVID-19.** Stay home and away from other people for at least 5 days. [Learn why CDC updated guidance for the general public.](#)

**IF YOU**  
Were exposed to COVID-19 and are **NOT up to date** on COVID-19 vaccinations

**Quarantine for at least 5 days**

**Stay home**  
Stay home and [quarantine](#) for at least 5 full days.

Wear a [well-fitting mask](#) if you must be around others in your home.

**[Do not travel.](#)**

**Get tested**  
Even if you don't develop symptoms, [get tested](#) at least 5 days after you last had [close contact](#) with someone with COVID-19.

**After quarantine**

Watch for [symptoms](#)  
Watch for symptoms until 10 days after you last had close contact with someone with COVID-19.

**Avoid travel**

It is best to [avoid travel](#) until a full 10 days after you last had close contact with someone with COVID-19.

**If you develop symptoms**

[Isolate](#) immediately and [get tested](#). Continue to stay home until you know the results. Wear a [well-fitting mask](#) around others.

**Take precautions until day 10**

**Wear a well-fitting mask**

Wear a [well-fitting mask](#) for 10 full days any time you are around others inside your home or in public. Do not go to places where you are unable to wear a well-fitting mask.

**If you must travel during days 6-10, [take precautions.](#)**

**Avoid being around people who are [more likely to get very sick](#) from COVID-19.**

**IF YOU**  
Were exposed to COVID-19 and are **up to date** on COVID-19 vaccinations

**No quarantine**

You do not need to stay home **unless** you develop symptoms.

**Get tested**

Even if you don't develop symptoms, [get tested](#) at least 5 days after you last had [close contact](#) with someone with COVID-19.

**Watch for symptoms**

Watch for [symptoms](#) until 10 days after you last had close contact with someone with COVID-19.

**If you develop symptoms**

[Isolate](#) immediately and [get tested](#). Continue to stay home until you know the results. Wear a [well-fitting mask](#) around others.

**Take precautions until day 10**

**Wear a well-fitting mask**

Wear a [well-fitting mask](#) for 10 full days any time you are around others inside your home or in public. Do not go to places where you are unable to wear a well-fitting mask.

**[Take precautions if traveling](#)**

**Avoid being around people who are [more likely to get very sick](#) from COVID-19.**

**IF YOU were exposed to COVID-19 and had confirmed COVID-19 within the past 90 days (you tested positive using a viral test)**

**No quarantine**  
You do not need to stay home **unless** you develop symptoms.

**Watch for symptoms**  
Watch for [symptoms](#) until 10 days after you last had [close contact](#) with someone with COVID-19.

**If you develop symptoms**  
[Isolate](#) immediately and [get tested](#). Continue to stay home until you know the results. Wear a well-fitting mask around others.

**Take precautions until day 10**

**Wear a well-fitting mask**  
Wear a [well-fitting mask](#) for 10 full days any time you are around others inside your home or in public. Do not go to places where you are unable to wear a well-fitting mask.

[Take precautions if traveling](#)

**Avoid being around people who are [more likely to get very sick](#) from COVID-19.**

## Calculating Isolation

Day 0 is your first day of symptoms or a positive viral test. **Day 1 is the first full day after your symptoms developed or your test specimen was collected.** If you have COVID-19 or have symptoms, isolate for at least 5 days.

**IF YOU Tested positive for COVID-19 or have symptoms, regardless of vaccination status**

**Stay home for at least 5 days**  
Stay home for 5 days and [isolate](#) from others in your home.  
  
Wear a [well-fitting mask](#) if you must be around others in your home.

[Do not travel](#).

**Ending isolation if you had symptoms**  
[End isolation after 5 full days](#) if you are fever-free for 24 hours (without the use of fever-reducing medication) and your symptoms are improving.

**Ending isolation if you did NOT have symptoms**  
[End isolation after at least 5 full days](#) after your positive test.

**If you got very sick from COVID-19 or have a weakened immune system**  
You should isolate for at least 10 days. [Consult your doctor before ending isolation](#).

**Take precautions until day 10**

**Wear a well-fitting mask**  
Wear a [well-fitting mask](#) for 10 full days any time you are around others inside your home or in public. Do not go to places where you are unable to wear a mask.

**Do not travel**

[Do not travel](#) until a full 10 days after your symptoms started or the date your positive test was taken if you had no symptoms.

**Avoid being around people who are [more likely to get very sick](#) from COVID-19.**

#### DEFINITIONS

### Exposure

Contact with someone infected with SARS-CoV-2, the virus that causes COVID-19, in a way that increases the likelihood of getting infected with the virus.

### Close Contact

A close contact is someone who was less than 6 feet away from an infected person (laboratory-confirmed or a clinical diagnosis) for a cumulative total of 15 minutes or more over a 24-hour period. For example, three individual 5-minute exposures for a total of 15 minutes. People who are exposed to someone with COVID-19 after they completed at least 5 days of isolation are not considered close contacts.

Source:

<https://www.cdc.gov/coronavirus/2019-ncov/your-health/quarantine-isolation.html?msclkid=007e7af4b46011ecb2849ed9185e5c7d>



**E**

**Town of West Newbury  
Select Board**

**Monday, November 15, 2021 @ 7:00pm**

381 Main Street, Town Office Building

[www.wnewbury.org](http://www.wnewbury.org)

**Open Session Meeting Minutes-DRAFT**

**Open Session:** Chairperson Parker called Open Session to order at 7:10pm.

**Participation at the Meeting:**

Richard Parker, David Archibald, and Wendy Reed; *Select Board Members*

Angus Jennings, *Town Manager*

James Blatchford, *Town Clerk*

Carly Ramos

Patricia Reeser

Christian Kuhn, *Town Assessor*

Tony Roselli, *Roselli & Clark Associates*

**Announcements:**

- This meeting is being broadcast on local cable TV and recorded for rebroadcast on the local cable channels and on the internet. Meeting also accessible by remote participation; see agenda for details.
- Regional Vaccination Clinics, ages 5-11. November 15, 22, 29 (see page 2 and the Town website for details).
- Community Preservation Committee: Public Informational Hearing to solicit input from citizens regarding the needs, possibilities and resources of the Town relative to the Act in the areas of Community Housing, Historic Preservation, Open Space and Recreation regarding the development of the Community Preservation Plan. Thurs., Nov. 18, 2021, at 8:00 PM in the First Floor Hearing Room (see page 3 for details).
- Call for volunteers: current opportunities at <https://www.wnewbury.org/volunteer>
- Reminder to subscribe for emailed Town news/announcements at <https://www.wnewbury.org/subscribe>

**Regular Business**

**A. Police Department staffing updates**

Jeff Duran appeared before the Select Board in person and publicly announced the intention to retire as the Police Chief effective June 30, 2022 (see exhibit A page 5 for details). **No motion was made at this time.**

**B. Applications for Committee appointments:**

**a. Carly Ramos – Cultural Council**

Carly Ramos appeared before the Select Board in person (see exhibit Ba pages 6-7 for details). The Select Board thanked Ramos for volunteering to serve on the Cultural Council. **Parker made a motion to appoint Carly Ramos to the Cultural Council. Archibald seconded.** Parker stated the term would be effective through June 30, 2024. **Motion was unanimously passed (3 Yes, 0 No, 0 Abstain).** Jennings stated the Town Clerk's Office would make arrangements to get sworn in and would provide the required paperwork for appointment.

**b. Patricia Reeser – Community Preservation Committee (at-large seat)**

Patricia Reeser appeared before the Select Board in person (see exhibit Bb page 8 for details). The Select Board and Reeser discussed how the appointment, if approved, would provide representation for the Open Space Committee on the CPC. Jennings clarified the appointment would fill the vacancy of a member that had stepped down and the term would be effective through June 30, 2022. **Parker made a motion to appoint Patricia Reeser to the CPC effective through June 30, 2022. Archibald seconded. Motion was unanimously passed (3 Yes, 0 No, 0 Abstain).**

**C. FY22 Tax Classification Hearing – joint Select Board meeting with Board of Assessors**

Christian Kuhn appeared before the Select Board in person (see exhibit C pages 9-20 for details) and stated a Tax Classification Hearing was required each year.

Kuhn discussed the unprecedented growth in the real estate market that had led to a large jump in valuations. Kuhn stated the DOR had certified the valuations November 1<sup>st</sup> and the Select Board would need to vote on the single tax or split tax rate, the open space discount, the residential exemption, and the small commercial exemption. Kuhn informed the Select Board the Board of Assessors had recommended a single tax rate as it had done so in previous years. **Parker made a motion to adopt a single tax rate. Archibald seconded. Archibald made a motion to amend the original motion to include not recommending the open space discount, the residential exemption, or the small commercial properties. Reed seconded.** Kuhn briefly explained that the residential exemption was generally used by communities with a large quantity of second homes or rental properties. **Motion was unanimously passed (3 Yes, 0 No, 0 Abstain).**

Jennings explained the tax rate would not be set that evening, but the estimated tax rate was likely to decrease to 13.06, the lowest in more than a decade. Jennings estimated that typical bill would decrease roughly 2%. The Select Board discussed how valuations could impact the ability to pay tax bills for the financially



vulnerable or senior citizens on fixed incomes. Richard Baker appeared before the Select Board in person and stated that there were a lot of programs available for the elderly and lower income residents. Baker stated exemptions forms were available in the Assessor's Office and residents were welcome to fill one out.

#### **D. Presentation of FY21 Town Audit – Tony Roselli, Roselli & Clark Associates**

Tony Roselli appeared before the Select Board remotely (see exhibit D pages 21-82 for details). Roselli gave a brief overview of the Town Audit and stated the Town had a very good chance at getting a AAA bond rating. Roselli recommended three actions that could benefit the Town. The first, Roselli recommended staff to continue to receive cyber security training with an emphasis on fishing emails. The second, Roselli recommended the town open a new vendor account and stated it would take roughly 6 months to complete the process. Lastly, Roselli recommended more staffing to support the Finance Department and the current staff within the office. **No motion was made at this time.**

#### **E. Discussion of Free Cash / tax rate reductions**

The Select Board and Jennings discussed turnbacks as the major contributing factor to the increase of Free Cash each year (see exhibit E page 83 for details). Jennings stated that emergency service departments, such as Fire and Police, were always conservatively budgeted as there was no way of knowing how many emergencies would occur any given year. Jennings stated that solid waste, recycling, and employee health care coverage were other area that were conservatively budgeted. The Select Board discussed whether the Town should continue tax rate reductions through use of Free Cash or if the Town Budget could be tightened up to reduce the amount of turnbacks. **No motion was made at this time.**

#### **F. Discussion re process to determine uses for American Rescue Plan Act (ARPA) funds**

Jennings stated \$704,000 in ARPA funds were in the bank and the town had until December 31, 2024 to use them (see exhibit F pages 84-87 for details). Jennings suggested the funds to be put toward big dollar project that was a known need for the town. The Select Board and Jennings discussed whether APRA funds could be used to cover administration costs needed for the project. It was decided that a list of significant Capital projects that would be eligible for the use of ARPA funds would be created and reviewed by the Select Board. **No motion was made at this time.**

#### **G. Public hearing: proposed Personnel Policy re advance approval for OT/time worked above budget**

**Parker made a motion to open the public hearing for the proposed Personnel Policy. Archibald seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain).**

Jennings stated the policy amendment was never intended to apply to first responders or union members and the clarification would need to be noted within the policy (see exhibit pages 88-92 for details). Jennings informed the Select Board that a request for clarification concerning compensatory time versus overtime had been received. Jennings stated that the choice was generally up to the employee, but Town Counsel had advised that under FLSA (Fair Labor Standards Act) an understanding or agreement, before the performance of the work, must be reached between the employee and employer. The Select Board discussed unavoidable scenarios where an employee could work over the budgeted hours. Jennings stated the spirit of the policy was to initiate conversation beforehand and the Town was obligated to pay employees for any time that was worked. **Parker made a motion to approve the amendment to the personnel policy regarding advanced approval of OT/time worked above budgeted hours, with the inclusion that the amendment would not apply to Fire or EMA services.** The Select Board discussed where in the policy the clarification to exclude Fire and EMA services from the amendment could be placed. Jennings suggested creating a separate applicability section in the beginning of the policy specifically for that clarification. **Reed seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain).**

**Parker made a motion to close the public hearing. Reed seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain).**

#### **H. Update on work to establish a Housing Trust, Board of Trustees**

The Select Board and Jennings discussed how a bylaw would further define the powers and authorities of a Housing Trust beyond the adoption of the state statute (see exhibit H pages 93-107 for details). Reed stated the acceptance of the statute had been expressed to the residents as the first step, therefore the town should move forward and establish a committee to define the responsibilities of the trust with the intention of creating a bylaw. The Select Board and Jennings reviewed the draft charge provided in the packet and the proposed composition of the committee members. **Parker made a motion to establish an affordable housing trust bylaw committee and to adopt the charge as written. Reed seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain).** The Select Board stated any interested party willing to serve on the Affordable Housing Bylaw Committee should submit an application.

#### **I. Town Manager request for authorization, pursuant to Interim Regulations for Housing Contribution Payments and Resale Fees, to enter contract for services bringing total costs above \$10,000 in FY22**

Jennings discussed finding the right vendor for the community that could provide consulting services for the Affordable Housing Committee until support was no longer needed (see exhibit I pages 108-120 for details). Parker believed it would be best to wait until the make up of the committee had been established to determine the level of support needed. Jennings stressed the importance of procuring support for the committee and avoiding additional workload on the Town Manager and Town Planner. It was decided to revisit this topic after the committee membership was established. **This item was tabled.**

**J. Review of updated draft Employee COVID-19 Exposure Protocols**

The Select Board and Jennings reviewed the updated Employee COVID-19 Exposure Protocols draft (see exhibit J pages 121- 123 for details). The Select Board and Jennings discussed continuing not to take from employee accrued sick leave for time away due to COVID-19, the addition that an employee may be required to provide a positive/negative test, and the addition of noting the policy would apply to any employee with a work station within the Town Office Building or whose regular work schedule includes work within the Town Office Building. The Select Board chose a sunset date of June 30, 2022. **Parker made a motion to approve the updated Employee COVID-19 Exposure Protocols as amended. Reed seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain).**

**K. Set date and time for annual Holiday Tree Lighting**

Jennings stated the annual Holiday Tree Lighting had historically been held the Thursday after Thanksgiving at 6pm. Jennings stated DPW would set up the lights beforehand and Glen Kemper would bring the hot chocolate and cookies as has been done in the past. Archibald suggested moving the time to 6:30pm to accommodate for parents with children. It was decided the Annual Tree Lighting would be December 2<sup>nd</sup> at 6:30pm.

**Town Manager Updates**

**L. Draft timeline, FY23 budget process**

Jennings discussed timeline for gathering budget proposals from departments, boards, and committees (see exhibit L pages 124-127 for details). The Select Board and Jennings discussed whether the Annual Town Meeting would be held April 25<sup>th</sup> or if an outdoor venue would be more suitable and the meeting would be held in May. The Select Board and Jennings discussed the firm date of the local election, May 2<sup>nd</sup>, and potentially holding the Town Meeting the following Saturday. **No motion made at this time.**

**M. Soldiers & Sailors Building: disc. w Lynne Spencer re procedure needed to propose disposition (via sale or long-term lease) with accompanying preservation restriction**

Jennings stated a cost proposal had been requested from Sullivan, Spencer & Vogt for assistance in preparing the proposal for disposition, for either sale or long-term lease, and KP Law for assistance in preparing a preservation restriction (see exhibit M pages 128-131 for details). Jennings and the Select Board discussed how drafting a preservation restriction would be a lengthy process and requested to review examples of what other towns have done in the past. **No motion was made at this time.**

**N. Proposal received for safety audit of Pipestave/Page intersection**

Jennings reviewed the virtual meeting held with TEC and DPW Director, Wayne Amaral (see exhibit n pages 132-136 for details). Jennings reviewed amendments to the agreement that were discussed which included; completion of the traffic counts in April, increasing the public meetings from one to at least 2 or more, and submission of multiple conceptual layouts to chose from for the final conceptual plan. Jennings stated billing clarification would be requested to outline if payment would be contingent upon a percent complete or milestone model. The Select Board and Jennings discussed how TEC had completed roughly 90% of all Safe Route to School Grants in Massachusetts. **No motion was made at this time.**

**O. Follow up meeting assignments**

No items were discussed at this time.

**P. Placing items for future agendas**

The Select Board requested an update on the Pentucket Middle/High School project. Jennings stated the item would appear on the next agenda.

**Parker made a motion to adjourn. Archibald seconded. Motion unanimously passed (3 Yes, 0 No, 0 Abstain). Open Session adjourned at 10:37pm.**

## CREDIT OPINION

9 January 2023



### Contacts

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## Town of West Newbury, MA

Update to credit analysis following upgrade to Aaa

### Summary

[West Newbury, MA](#) (issuer rating Aaa stable) benefits from a wealthy and stable economic base in Essex County within commuting distance to [Boston MA](#) (Aaa stable). The credit profile additionally benefits from years of conservative budgeting, strong reserves and liquidity position and a minimal long-term liability profile. Though, the debt is expected to grow in the coming year, the total leverage and adjusted fixed costs will remain modest.

On January 6, 2022 Moody's upgraded the town's issuer rating to Aaa from Aa2. The rating action concluded the review for possible upgrade initiated on November 3, 2022 in conjunction with the release of the US Cities and Counties Methodology.

### Credit strengths

- » Strong financial position
- » Affluent residential tax base
- » Modest long-term liabilities with low fixed costs

### Credit challenges

- » Limited scope for material economic expansion
- » Aging population

### Rating outlook

The stable outlook reflects our expectation of continued strong financial and economic performance.

### Factors that could lead to an upgrade

- » Not applicable

### Factors that could lead to a downgrade

- » Material increase in leverage
- » Deterioration of reserves and liquidity
- » Decreased economic growth or resident incomes and wealth

## Key indicators

Exhibit 1

### West Newbury (Town of) MA

	2019	2020	2021	2022	Aaa Medians
<b>Economy</b>					
Resident income ratio (%)	216.7%	211.5%	N/A	N/A	173.2%
Full Value (\$000)	\$955,511	\$955,511	\$1,027,056	\$1,027,056	\$8,668,233
Population	4,631	4,688	N/A	N/A	36,139
Full value per capita (\$)	\$206,329	\$203,821	N/A	N/A	\$225,444
Economic growth metric (%)	N/A	0.4%	N/A	N/A	-0.6%
<b>Financial Performance</b>					
Revenue (\$000)	\$17,681	\$18,039	\$19,258	\$19,362	\$101,271
Available fund balance (\$000)	\$8,878	\$8,944	\$9,576	\$9,137	\$60,284
Net unrestricted cash (\$000)	\$13,665	\$13,849	\$15,333	\$15,775	\$85,080
Available fund balance ratio (%)	50.2%	49.6%	49.7%	47.2%	62.5%
Liquidity ratio (%)	77.3%	76.8%	79.6%	81.5%	89.9%
<b>Leverage</b>					
Debt (\$000)	\$3,165	\$3,767	\$3,358	\$2,996	\$71,359
Adjusted net pension liabilities (\$000)	\$16,904	\$18,712	\$20,221	\$18,912	\$120,889
Adjusted net OPEB liabilities (\$000)	\$1,715	\$2,391	\$1,449	\$1,048	\$14,025
Other long-term liabilities (\$000)	\$93	\$131	\$120	\$139	\$3,650
Long-term liabilities ratio (%)	123.7%	138.6%	130.6%	119.3%	257.7%
<b>Fixed costs</b>					
Implied debt service (\$000)	\$270	\$231	\$270	\$236	\$4,843
Pension tread water contribution (\$000)	\$756	\$743	\$669	N/A	\$3,247
OPEB contributions (\$000)	\$77	\$92	\$88	\$116	\$517
Implied cost of other long-term liabilities (\$000)	\$8	\$7	\$9	\$8	\$244
Fixed-costs ratio (%)	6.3%	5.9%	5.4%	5.3%	11.3%

For definitions of the metrics in the table above please refer to the [US Cities and Counties Methodology](#) or see the Glossary in the Appendix below. Metrics represented as N/A indicate the data were not available at the time of publication. The medians come from our most recently published [US Cities and Counties Median Report](#). The Economic Growth metric cited above compares the five-year CAGR of real GDP for Boston-Cambridge-Newton, MA-NH Metropolitan Statistical Area to the five-year CAGR of real GDP for the US.

Sources: US Census Bureau, West Newbury (Town of) MA's financial statements and Moody's Investors Service, US Bureau of Economic Analysis

## Profile

The Town of West Newbury is located in Essex County in the North Shore region of [Massachusetts](#) (Aa1 stable), approximately 40 miles north of Boston (Aaa stable). The town is primarily residential and provides general government services including police and fire protection, garbage removal, water, K-12 education, streets, and parks and recreation. The town has a population of over 4,600.

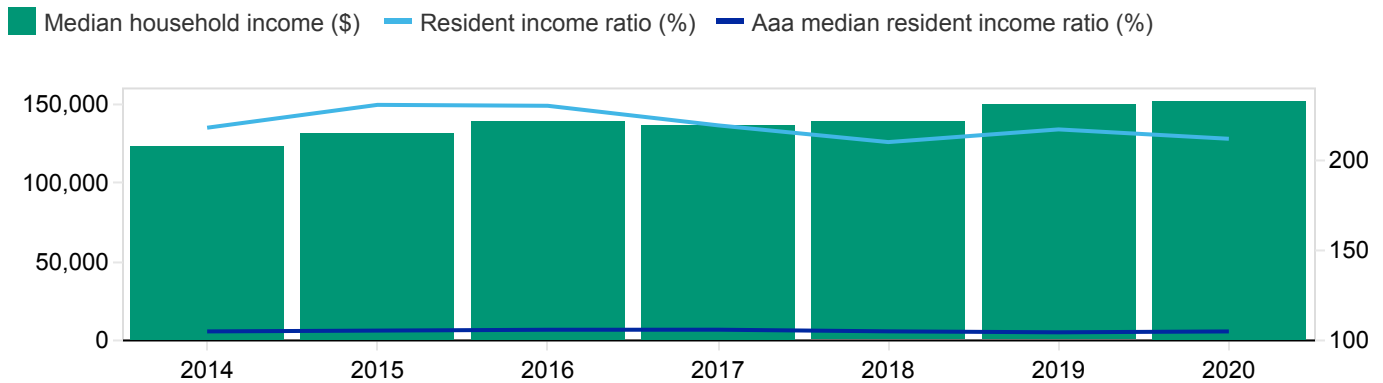
## Detailed credit considerations

### Economy: strong regional economy with affluent resident incomes

The town's local economy will remain a credit strength as it continues to benefit from its favorable location within commuting distance to Boston, MA (Aaa stable). The town is primarily residential (97% of tax base) with very strong resident wealth and income levels. The \$1.2 billion tax base (as of 2023 equalized value) has grown at a compound annual rate of 3.5% over the last five years. This growth has been driven mainly by the appreciation of existing housing properties given limited ongoing developments. The town's top ten taxpayers do not represent a concentrated portion of the tax base but are weighted in utility and real estate developers. West Newbury benefits from substantially higher than state and national income levels as the adjusted median household income is equal to 211.5% of the nation. The town's 2022 equalized value per capita of \$253,717 highlights the robust property wealth. While, the median age of 49.5 is above the state and national median of 39.4 and 37.9, the population has gradually increased over the past ten years. The city's unemployment rate (November 2022) of 1.9% continues to trend below the state's 2.9% and 3.4% of the US.

This publication does not announce a credit rating action. For any credit ratings referenced in this publication, please see the issuer/deal page on <https://ratings.moody.com> for the most updated credit rating action information and rating history.

Exhibit 2  
Resident Income

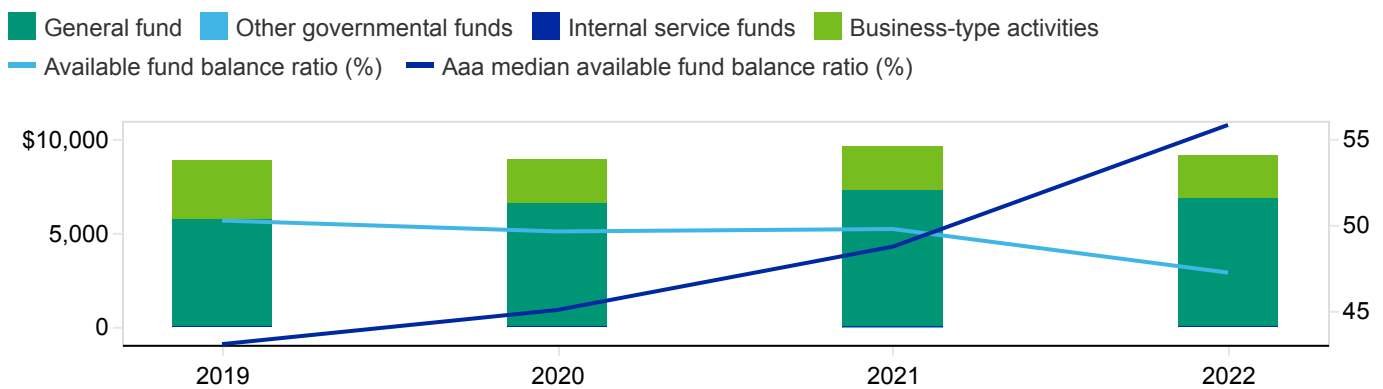


Source: Moody's Investors Service

**Financial operations: strong financial position with stable reserve levels**

The town's financial performance over the past five years has been very strong and will continue given conservative budgeting and strict oversight of financial operations. Available fund balance over the past five years consistently exceeded 46% of revenues, well above the state Aaa median. The most recent audit for fiscal 2022 shows a total available fund balance of \$9.1 million across all governmental funds and business-type activities, representing a strong 47.1% of total revenues (see exhibit). About 95% of the town's revenue base is comprised of governmental activities, with property taxes being the largest revenue driver representing 84.3% of fiscal 2022 governmental revenue. The town was allocated to receive a total of \$1.4 million in ARPA grants, which will be used for one-time capital improvement and improvement in water project. The fiscal 2023 budget increased by 3.9% over the prior year and was driven by education, health insurance and labor. Though, the town's property tax rate has declined in recent years, the total property tax revenues will continue to increase driven by significant increases in the property values. The town has approximately \$1.6 million of unused levy capacity, which provides additional financial flexibility as the town can raise the property tax levy beyond the 2.5% levy limit to match rising expenditures if needed. Management has taken a conservative approach to the town's financial performance and is aiming to maintain the strong financial position in the near future. In addition to the governmental fund, the town also has a water fund makes up about 6% of total revenues, and has remained healthy and stable over the past five years. The water rate has not changed since 2019, management reports that a new rate study is now underway.

Exhibit 3  
Fund Balance

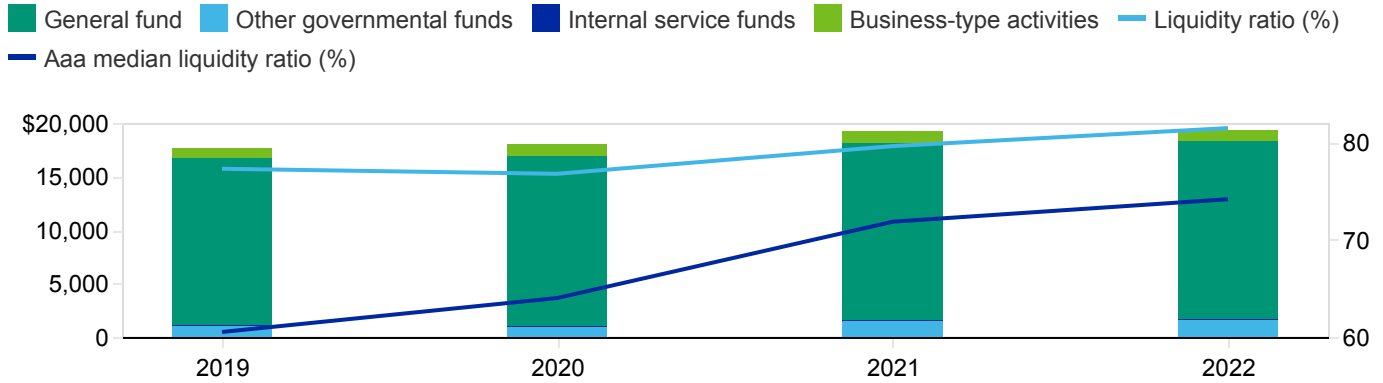


Source: Moody's Investors Service

**Liquidity**

The town's cash and investments at the end of fiscal 2022 totaled \$15.7 million, representing a strong 81.5% of total revenue. The disparity between the town's cash and available fund balance is attributable to nearly \$5.8 million of other governmental funds were restricted for capital projects.

Exhibit 4  
Cash



Source: Moody's Investors Service

**Leverage: low leverage level with modest future borrowing plans**

The town's overall leverage will remain modest, given its modest future borrowing plans. As of June 30, 2022, the total long-term liabilities ratio of 119.3% of revenue is well below the Aaa state and national medians. The town is planning to issue approximately \$2.7 million bonds through MA Clean Water Trust in spring 2023 to replace its water main. The debt service will be covered by the water charges. Given the town's minimum debt burden, the upcoming borrowing is not going to have material impacts to its total leverage profile. The town maintains a ten-year capital improvement plan; with majority of its projects covered by the capital reserves. The adjusted fixed costs remain well below the Aaa average at 5.3% of revenues.

Exhibit 5

**Total Primary Government - Long Term Liabilities**



Source: Moody's Investors Service

**Legal security**

Not applicable

**Debt structure**

All of the town's debt is fixed-rate.

**Debt-related derivatives**

The town is not party to any swaps or other derivative agreements.

**Pensions and OPEB**

West Newbury's pension liabilities are larger than its debt burden and though manageable at this time, represent a potential future credit challenge. The town participates in Essex Regional Contributory Retirement System, a multi-employer defined benefit plan and makes annual required contributions. The latest actuarial report assumes a high 7.0% discount rate with a funded date of 2035. The town's teachers participate in the Massachusetts Teachers Retirement System in which the town receives on-behalf payments toward that liability that is covered by the Commonwealth.

Going forward, the town's pension liabilities will be materially impacted by current market conditions. As the stock market underperforms, reported liabilities are expected to increase sharply. However, the concurrent rise in interest rates will have a countervailing force as a higher discount rate leads to smaller Moody's adjusted long-term liabilities. We currently expect the interest rate impact to be greater than the investment return impact, leading ANPLs to decrease, though this will change with market conditions.

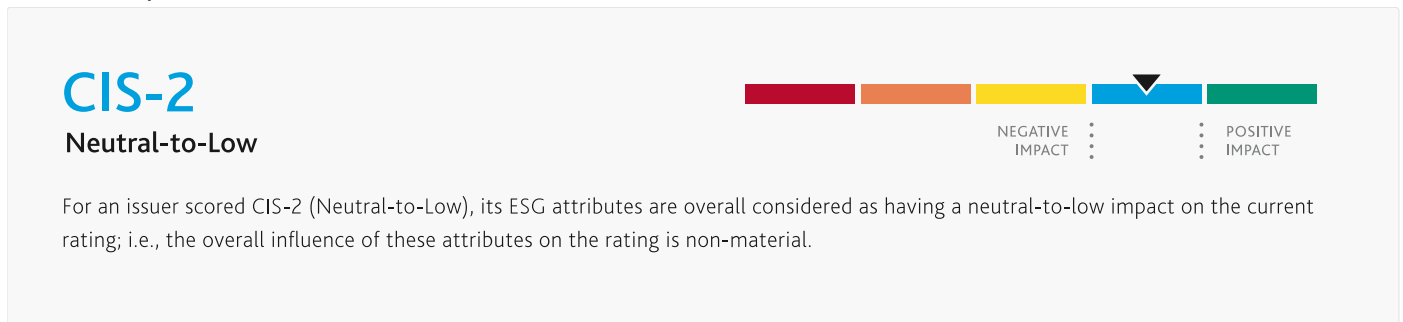
The town also funds its OPEB liability on a pay-go basis, and makes annual deposits into OPEB trust fund. The town's OPEB liability is modest with the fiduciary net position at 91.2% of total OPEB liability, much stronger than most local governments. The OPEB costs will likely escalate as the number of retirees it covers grows and retirees age. Overall, the adjusted fixed costs are well below average at 5.3% of total revenues.

**ESG considerations**

**West Newbury (Town of) MA's ESG Credit Impact Score is Neutral-to-Low CIS-2**

Exhibit 6

**ESG Credit Impact Score**

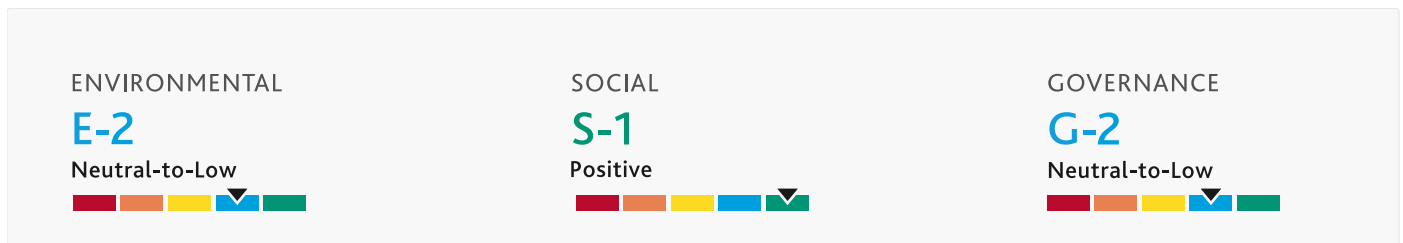


Source: Moody's Investors Service

The town of West Newbury's ESG credit impact score is neutral to low (**CIS-2**), reflecting neutral to low exposure to environmental and governance risks and a positive social profile, that support the town's credit rating, resilience and capacity to respond to shocks.

Exhibit 7

**ESG Issuer Profile Scores**



Source: Moody's Investors Service

### Environmental

West Newbury's E environmental issuer profile score is neutral to low (**E-2**). The town's carbon transition, natural capital, water management, and waste and pollution risks are modest. Given West Newbury's geographical location, physical climate risk is also neutral to low with no material exposure to sea level rise and moderate exposure to shocks from extreme weather events such as hurricanes and nor-easters.

### Social

West Newbury's S social issuer profile score is positive (**S-1**). The town has neutral to low exposure to demographics, housing, and access to basic services, while the labor and income, education and health and safety profiles are positive.

### Governance

West Newbury's G governance issuer profile score is neutral to low (**G-2**). The town has a favorable institutional structure and provides strong transparency and disclosure. The town's policy credibility and effectiveness is satisfactory with strong budget management that is reflected in its financial position and operating trend.

ESG Issuer Profile Scores and Credit Impact Scores for the rated entity/transaction are available on Moodys.com. In order to view the latest scores, please click [here](#) to go to the landing page for the entity/transaction on MDC and view the ESG Scores section.



## Rating methodology and scorecard factors

The US Cities and Counties Rating Methodology includes a scorecard, which summarizes the rating factors generally most important to city and county credit profiles. Because the scorecard is a summary, and may not include every consideration in the credit analysis for a specific issuer, a scorecard-indicated outcome may or may not map closely to the actual rating assigned.

Exhibit 8

### West Newbury (Town of) MA

	Measure	Weight	Score
<b>Economy</b>			
Resident income ratio	211.5%	10.0%	Aaa
Full value per capita	253,717	10.0%	Aaa
Economic growth metric	0.4%	10.0%	Aaa
<b>Financial Performance</b>			
Available fund balance ratio	47.2%	20.0%	Aaa
Liquidity ratio	81.5%	10.0%	Aaa
<b>Institutional Framework</b>			
Institutional Framework	Aa	10.0%	Aa
<b>Leverage</b>			
Long-term liabilities ratio	119.3%	20.0%	Aa
Fixed-costs ratio	5.3%	10.0%	Aaa
<b>Notching factors</b>			
Additional Strength in Local Resources	0.5		
Scorecard-Indicated Outcome			Aaa
<b>Assigned Rating</b>			<b>Aaa</b>

Sources: US Census Bureau, West Newbury (Town of) MA's financial statements and Moody's Investors Service

## Appendix

Exhibit 9

### Key Indicators Glossary

	Definition	Typical Source*
<b>Economy</b>		
Resident income ratio	Median Household Income (MHI) for the city or county, adjusted for Regional Price Parity (RPP), as a % of the US MHI	MHI: US Census Bureau RPP: US Bureau of Economic Analysis
Full value	Estimated market value of taxable property in the city or county	State repositories; audited financial statements; continuing disclosures
Population	Population of the city or county	US Census Bureau
Full value per capita	Full value / population	
Economic growth metric	Five year CAGR of real GDP for Metropolitan Statistical Area or county minus the five-year CAGR of real GDP for the US	Real GDP: US Bureau of Economic Analysis
<b>Financial performance</b>		
Revenue	Sum of revenue from total governmental funds, operating and non-operating revenue from total business-type activities, and non-operating revenue from internal services funds, excluding transfers and one-time revenue, e.g., bond proceeds or capital contributions	Audited financial statements
Available fund balance	Sum of all fund balances that are classified as unassigned, assigned or committed in the total governmental funds, plus unrestricted current assets minus current liabilities from the city's or county's business-type activities and internal services funds	Audited financial statements
Net unrestricted cash	Sum of unrestricted cash in governmental activities, business type activities and internal services fund, net of short-term debt	Audited financial statements
Available fund balance ratio	Available fund balance (including net current assets from business-type activities and internal services funds) / Revenue	
Liquidity ratio	Net unrestricted cash / Revenue	
<b>Leverage</b>		
Debt	Outstanding long-term bonds and all other forms of long-term debt across the governmental and business-type activities, including debt of another entity for which it has provided a guarantee disclosed in its financial statements	Audited financial statements; official statements
Adjusted net pension liabilities (ANPL)	Total primary government's pension liabilities adjusted by Moody's to standardize the discount rate used to compute the present value of accrued benefits	Audited financial statements; Moody's Investors Service
Adjusted net OPEB liabilities (ANOL)	Total primary government's net other post-employment benefit (OPEB) liabilities adjusted by Moody's to standardize the discount rate used to compute the present value of accrued benefits	Audited financial statements; Moody's Investors Service
Other long-term liabilities (OLTL)	Miscellaneous long-term liabilities reported under the governmental and business-type activities entries	Audited financial statements
Long-term liabilities ratio	Debt + ANPL + ANOL + OLTL / Revenue	
<b>Fixed costs</b>		
Implied debt service	Annual cost to amortize city or county's long-term debt over 20 years with level payments	Audited financial statements; official statements; Moody's Investors Service
Pension tread water contribution	Pension contribution necessary to prevent reported unfunded pension liabilities from growing, year over year, in nominal dollars, if all actuarial assumptions are met	Audited financial statements; Moody's Investors Service
OPEB contribution	City or county's actual contribution in a given period	Audited financial statements
Implied cost of OLTL	Annual cost to amortize city or county's other long-term liabilities over 20 years with level payments	Audited financial statements; Moody's Investors Service
Fixed-costs ratio	Implied debt service + Pension tread water + OPEB contributions + Implied cost of OLTL / Revenue	

\*Note: If typical data source is not available then alternative sources or proxy data may be considered. For more detailed definitions of the metrics listed above please refer to the [US City and Counties Methodology](#).

Source: Moody's Investors Service

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REPORT NUMBER 1353300

## CLIENT SERVICES

Americas	1-212-553-1653
Asia Pacific	852-3551-3077
Japan	81-3-5408-4100
EMEA	44-20-7772-5454

Filter by: Segment 1: 01

Segment 2: 114, 122, 123, 131, 132, 135, 141, 145, 151, 161, 162, 171, 172, 175, 176, 179, 199, 200, 210, 220, 230, 240, 291, 292, 295, 299, 304, 305, 310, 420, 422, 424, 510, 541, 542, 543, 610, 630, 631, 635, 637, 691, 695, 699, 710, 750, 911, 913, 914, 916, 919, 945

Group as: \*\*\_\*\*\*\_\*\*\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
<b>Group 1: Segment 1: Fund</b>		Code: 01 - General Fund			
<b>Group 2: Segment 2: Department</b>		114 - Moderator			
01-114-5111-000000	Moderators Salary	200.00	0.00	200.00	0.00
01-114-5400-000000	Moderators Expenses	60.00	0.00	60.00	0.00
<b>Total Group 2: Segment 2: Department</b>		<b>260.00</b>	<b>0.00</b>	<b>260.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>		122 - Select Board			
01-122-5300-000000	Professional & Tech Services	16,000.00	-1,245.75	14,754.25	7.79
01-122-5301-000000	Salary and Wages	30,116.00	-9,669.36	20,446.64	32.11
01-122-5400-000000	Selectmens Operating Expenses	14,000.00	-1,708.79	12,291.21	12.21
<b>Total Group 2: Segment 2: Department</b>		<b>60,116.00</b>	<b>-12,623.90</b>	<b>47,492.10</b>	<b>21.00</b>
<b>Group 2: Segment 2: Department</b>		123 - Town Manager			
01-123-5110-000000	Town Manager Salary	156,952.00	-72,161.88	84,790.12	45.98
01-123-5112-000000	Salary and Wages	73,541.00	0.00	73,541.00	0.00
01-123-5306-000000	Technology Expense	67,061.00	-39,311.12	27,749.88	58.62
01-123-5400-000000	Town Manager Expenses	32,429.81	-9,310.12	23,119.69	28.71
01-123-5710-000000	Vehicle Allowance	3,600.00	-1,800.00	1,800.00	50.00
<b>Total Group 2: Segment 2: Department</b>		<b>333,583.81</b>	<b>-122,583.12</b>	<b>211,000.69</b>	<b>36.75</b>
<b>Group 2: Segment 2: Department</b>		131 - Finance Committee			
01-131-5400-000000	Finance Committee Expenses	2,000.00	-439.00	1,561.00	21.95
<b>Total Group 2: Segment 2: Department</b>		<b>2,000.00</b>	<b>-439.00</b>	<b>1,561.00</b>	<b>21.95</b>
<b>Group 2: Segment 2: Department</b>		132 - Reserve Fund			
01-132-5780-000000	Reserve Fund	80,000.00	0.00	80,000.00	0.00
<b>Total Group 2: Segment 2: Department</b>		<b>80,000.00</b>	<b>0.00</b>	<b>80,000.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>		135 - Accountant			
01-135-5112-000000	Finance Dept Salaries & Wages	273,594.00	-111,798.46	161,795.54	40.86
01-135-5201-000000	Annual Audit	20,500.00	-20,500.00	0.00	100.00
01-135-5300-000000	Tax Title And Foreclosure	800.00	-3,445.60	-2,645.60	430.70
01-135-5341-000000	Postage Expenses	16,430.00	-9,527.88	6,902.12	57.99
01-135-5400-000000	Finance Dept Expenses	27,280.00	-9,931.85	17,348.15	36.41
01-135-5710-000000	Travel	2,000.00	-450.35	1,549.65	22.52
<b>Total Group 2: Segment 2: Department</b>		<b>340,604.00</b>	<b>-155,654.14</b>	<b>184,949.86</b>	<b>45.70</b>
<b>Group 2: Segment 2: Department</b>		141 - Assessors			
01-141-5111-000000	Assessors Salaries	132,081.00	-59,737.14	72,343.86	45.23
01-141-5400-000000	Assessors Expenses	51,699.00	-20,697.36	31,001.64	40.03
<b>Total Group 2: Segment 2: Department</b>		<b>183,780.00</b>	<b>-80,434.50</b>	<b>103,345.50</b>	<b>43.77</b>

Group as: \*\*\_\*\*\_\*\*\_\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
<b>Group 2: Segment 2: Department</b>	151 - Legal				
01-151-5200-000000	Legal Fees	65,124.00	-27,553.12	37,570.88	42.31
<b>Total Group 2: Segment 2: Department</b>	151 - Legal	<b>65,124.00</b>	<b>-27,553.12</b>	<b>37,570.88</b>	<b>42.31</b>
<b>Group 2: Segment 2: Department</b>	161 - Town Clerk				
01-161-5112-000000	Town Clerk Salary & Wages	141,144.00	-62,953.29	78,190.71	44.60
01-161-5340-000000	Operation Of Fax/Copier Machine	6,370.00	-2,126.21	4,243.79	33.38
01-161-5400-000000	Town Clerks Expenses	7,500.00	-2,973.48	4,526.52	39.65
<b>Total Group 2: Segment 2: Department</b>	161 - Town Clerk	<b>155,014.00</b>	<b>-68,052.98</b>	<b>86,961.02</b>	<b>43.90</b>
<b>Group 2: Segment 2: Department</b>	162 - Elections Registrations				
01-162-5111-000000	Town Clerk Compensation	200.00	0.00	200.00	0.00
01-162-5112-000000	Bd of Registrars Salary & Wages	9,900.00	-9,330.00	570.00	94.24
01-162-5400-000000	Bd Of Registrars Expenses	8,000.00	-3,369.83	4,630.17	42.12
<b>Total Group 2: Segment 2: Department</b>	162 - Elections Registrations	<b>18,100.00</b>	<b>-12,699.83</b>	<b>5,400.17</b>	<b>70.16</b>
<b>Group 2: Segment 2: Department</b>	171 - Conservation				
01-171-5112-000000	Conservation Com Salary & Wages	60,281.00	-21,167.41	39,113.59	35.11
01-171-5400-000000	Conservation Com Expenses	6,351.00	-2,547.42	3,803.58	40.11
<b>Total Group 2: Segment 2: Department</b>	171 - Conservation	<b>66,632.00</b>	<b>-23,714.83</b>	<b>42,917.17</b>	<b>35.59</b>
<b>Group 2: Segment 2: Department</b>	175 - Planning Board				
01-175-5112-000000	Planning Bd Salary & Wages	66,155.00	-23,687.21	42,467.79	35.81
01-175-5400-000000	Planning Board Expenses	9,220.00	-706.97	8,513.03	7.67
01-175-5690-000000	MVPC Assessment	1,748.00	-1,747.16	0.84	99.95
<b>Total Group 2: Segment 2: Department</b>	175 - Planning Board	<b>77,123.00</b>	<b>-26,141.34</b>	<b>50,981.66</b>	<b>33.90</b>
<b>Group 2: Segment 2: Department</b>	176 - Zoning Board of Appeals				
01-176-5400-000000	ZBA Expenses	700.00	0.00	700.00	0.00
<b>Total Group 2: Segment 2: Department</b>	176 - Zoning Board of Appeals	<b>700.00</b>	<b>0.00</b>	<b>700.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	179 - Open Space				
01-179-5400-000000	Open Space Expenses	750.00	0.00	750.00	0.00
<b>Total Group 2: Segment 2: Department</b>	179 - Open Space	<b>750.00</b>	<b>0.00</b>	<b>750.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	210 - Police				
01-210-5111-000000	School Resource Officer	69,883.00	0.00	69,883.00	0.00
01-210-5112-000000	Police Salaries & Wages	955,220.00	-435,450.35	519,769.65	45.59
01-210-5113-000000	Police OT Wages	63,427.00	-61,065.11	2,361.89	96.28
01-210-5400-000000	Police Expenses	105,560.00	-54,801.86	50,758.14	51.92
01-210-5853-000000	Police Cruiser	40,000.00	0.00	40,000.00	0.00
<b>Total Group 2: Segment 2: Department</b>	210 - Police	<b>1,234,090.00</b>	<b>-551,317.32</b>	<b>682,772.68</b>	<b>44.67</b>
<b>Group 2: Segment 2: Department</b>	220 - Fire				
01-220-5112-000000	Fire Alarm Wages	94,448.00	-22,089.41	72,358.59	23.39

Group as: \*\*\_\*\*\_\*\*\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
01-220-5113-000000	Fire Drills	27,893.00	-3,932.01	23,960.99	14.10
01-220-5114-000000	Fire Dept Other Wages	26,530.00	-11,057.67	15,472.33	41.68
01-220-5115-000000	Fire Administration Wages	27,305.00	-11,775.26	15,529.74	43.12
01-220-5200-000000	Fire Dept - Medical Exam	3,000.00	0.00	3,000.00	0.00
01-220-5240-000000	Hydrant Mapping Maint/Repair	77,207.00	0.00	77,207.00	0.00
01-220-5340-000000	Fire Alarm & Communications	11,000.00	-1,622.51	9,377.49	14.75
01-220-5400-000000	Fire Expenses	46,000.00	-27,132.35	18,867.65	58.98
<b>Total Group 2: Segment 2: Department</b>	<b>220 - Fire</b>	<b>313,383.00</b>	<b>-77,609.21</b>	<b>235,773.79</b>	<b>24.76</b>
<b>Group 2: Segment 2: Department</b>	<b>230 - Dispatch</b>				
01-230-5112-000000	Municipal Dispatch Salaries & Wages	285,034.00	-109,105.48	175,928.52	38.28
01-230-5113-000000	Municipal Dispatch OT Wages	25,765.00	-10,525.36	15,239.64	40.85
01-230-5400-000000	Municipal Dispatch Expenses	30,903.00	-19,837.12	11,065.88	64.19
<b>Total Group 2: Segment 2: Department</b>	<b>230 - Dispatch</b>	<b>341,702.00</b>	<b>-139,467.96</b>	<b>202,234.04</b>	<b>40.82</b>
<b>Group 2: Segment 2: Department</b>	<b>240 - Inspectional Services</b>				
01-240-5112-000000	Inspectors Salaries & Wages	129,962.00	-58,827.36	71,134.64	45.27
01-240-5400-000000	Inspectors Expenses	9,000.00	-3,901.57	5,098.43	43.35
01-240-5710-000000	Inspectors Vehicle Allowance	5,880.00	-2,880.00	3,000.00	48.98
<b>Total Group 2: Segment 2: Department</b>	<b>240 - Inspectional Services</b>	<b>144,842.00</b>	<b>-65,608.93</b>	<b>79,233.07</b>	<b>45.30</b>
<b>Group 2: Segment 2: Department</b>	<b>291 - Emergency Management</b>				
01-291-5112-000000	Emergency Mgmt Salary & Wages	9,138.00	-2,067.39	7,070.61	22.62
01-291-5400-000000	Emergency Mgmt Expenses	3,000.00	0.00	3,000.00	0.00
<b>Total Group 2: Segment 2: Department</b>	<b>291 - Emergency Management</b>	<b>12,138.00</b>	<b>-2,067.39</b>	<b>10,070.61</b>	<b>17.03</b>
<b>Group 2: Segment 2: Department</b>	<b>292 - Animal Control</b>				
01-292-5112-000000	Animal Control Professional Services	26,858.00	-13,429.00	13,429.00	50.00
<b>Total Group 2: Segment 2: Department</b>	<b>292 - Animal Control</b>	<b>26,858.00</b>	<b>-13,429.00</b>	<b>13,429.00</b>	<b>50.00</b>
<b>Group 2: Segment 2: Department</b>	<b>295 - Harbormaster</b>				
01-295-5300-000000	Harbormaster Contracted Services	5,000.00	-3,038.07	1,961.93	60.76
<b>Total Group 2: Segment 2: Department</b>	<b>295 - Harbormaster</b>	<b>5,000.00</b>	<b>-3,038.07</b>	<b>1,961.93</b>	<b>60.76</b>
<b>Group 2: Segment 2: Department</b>	<b>304 - Pentucket Regional</b>				
01-304-5690-000000	Pentucket Regional Sch Assessm	7,408,673.00	-4,321,725.94	3,086,947.06	58.33
01-304-5692-000000	Pentucket Capital Assessment	1,232,822.00	-719,146.19	513,675.81	58.33
01-304-5693-000000	Pentucket Asmnt Page Phase II	485,238.00	-283,055.50	202,182.50	58.33
<b>Total Group 2: Segment 2: Department</b>	<b>304 - Pentucket Regional</b>	<b>9,126,733.00</b>	<b>-5,323,927.63</b>	<b>3,802,805.37</b>	<b>58.33</b>
<b>Group 2: Segment 2: Department</b>	<b>305 - Whittier Regional</b>				
01-305-5690-000000	Whittier Minimum Contribution	219,455.00	-109,728.00	109,727.00	50.00
01-305-5691-000000	Whittier Other Assessments	27,420.00	-13,710.00	13,710.00	50.00
01-305-5692-000000	Whittier Debt/Capital Assess	23,860.00	-11,930.00	11,930.00	50.00

Group as: \*\*\_\*\*\_\*\*\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
<b>Total Group 2: Segment 2: Department</b>	305 - Whittier Regional	<b>270,735.00</b>	<b>-135,368.00</b>	<b>135,367.00</b>	<b>50.00</b>
<b>Group 2: Segment 2: Department</b>	310 - Essex North Shore				
01-310-5690-000000	Essex North Shore Agricultural Tech	43,213.00	-21,889.00	21,324.00	50.65
<b>Total Group 2: Segment 2: Department</b>	310 - Essex North Shore	<b>43,213.00</b>	<b>-21,889.00</b>	<b>21,324.00</b>	<b>50.65</b>
<b>Group 2: Segment 2: Department</b>	420 - DPW				
01-420-5112-000000	DPW Salary & Wages	567,397.00	-251,496.51	315,900.49	44.32
01-420-5113-000000	DPW Overtime Wages	16,000.00	-6,635.84	9,364.16	41.47
01-420-5200-000000	Snow & Ice Removal	150,000.00	-12,274.83	137,725.17	8.18
01-420-5210-000000	Town Bldgs Operating Expenses	150,830.00	-70,224.07	80,605.93	46.56
01-420-5240-000000	Town Bldgs Improvements	51,000.00	-15,657.79	35,342.21	30.70
01-420-5243-000000	Street Paving/Repairs	55,000.00	-558.00	54,442.00	1.01
01-420-5380-000000	Highway Sidewalk & Trees	205,215.00	-35,725.22	169,489.78	17.41
01-420-5385-000000	Stormwater Management	18,547.40	-6,397.50	12,149.90	34.49
01-420-5400-000000	DPW Expenses	14,250.00	-12,958.75	1,291.25	90.94
01-420-5405-000000	Parks Expenses	15,000.00	-13,080.50	1,919.50	87.20
01-420-5415-000000	Electricity	70,000.00	-25,269.33	44,730.67	36.10
01-420-5530-000000	Road Machinery Op Expenses	51,000.00	-44,095.95	6,904.05	86.46
01-420-5710-000000	DPW Vehicle Allowance	6,000.00	-3,000.00	3,000.00	50.00
<b>Total Group 2: Segment 2: Department</b>	420 - DPW	<b>1,370,239.40</b>	<b>-497,374.29</b>	<b>872,865.11</b>	<b>36.30</b>
<b>Group 2: Segment 2: Department</b>	424 - Street Lighting				
01-424-5410-000000	Public Street Lights	7,000.00	-3,799.80	3,200.20	54.28
<b>Total Group 2: Segment 2: Department</b>	424 - Street Lighting	<b>7,000.00</b>	<b>-3,799.80</b>	<b>3,200.20</b>	<b>54.28</b>
<b>Group 2: Segment 2: Department</b>	510 - Board of Health				
01-510-5111-000000	Board of Health Salary & Wages	129,621.00	-58,870.47	70,750.53	45.42
01-510-5200-000000	Public Health Nurse	8,175.00	-1,600.00	6,575.00	19.57
01-510-5290-000000	Waste Collection	401,940.00	-165,368.29	236,571.71	41.14
01-510-5291-000000	Recycling	10,000.00	-10,615.19	-615.19	106.15
01-510-5292-000000	Hazardous Waste Expenses	2,000.00	-1,543.74	456.26	77.19
01-510-5293-000000	Steele Landfill Monitoring	33,555.00	-10,425.00	23,130.00	31.07
01-510-5400-000000	Bd of Health Expenses	7,200.00	-2,697.72	4,502.28	37.47
<b>Total Group 2: Segment 2: Department</b>	510 - Board of Health	<b>592,491.00</b>	<b>-251,120.41</b>	<b>341,370.59</b>	<b>42.38</b>
<b>Group 2: Segment 2: Department</b>	541 - Council on Aging				
01-541-5112-000000	Council On Aging Salary & Wages	100,308.00	-44,984.88	55,323.12	44.85
01-541-5400-000000	Council On Aging Expenses	19,500.00	-9,132.63	10,367.37	46.83
<b>Total Group 2: Segment 2: Department</b>	541 - Council on Aging	<b>119,808.00</b>	<b>-54,117.51</b>	<b>65,690.49</b>	<b>45.17</b>
<b>Group 2: Segment 2: Department</b>	543 - Veterans Services				
01-543-5460-000000	Soldiers Grave Expenses	3,592.00	-1,592.00	2,000.00	44.32



Group as: \*\*\_\*\*\*\_\*\*\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
01-543-5499-000000	Memorial Day Expenses	2,200.00	0.00	2,200.00	0.00
01-543-5689-000000	Veterans Benefits & Expenses	4,400.00	-2,338.99	2,061.01	53.16
01-543-5770-000000	Northern Essex Veterans Services	21,096.00	-21,095.16	0.84	100.00
<b>Total Group 2: Segment 2: Department</b>	<b>543 - Veterans Services</b>	<b>31,288.00</b>	<b>-25,026.15</b>	<b>6,261.85</b>	<b>79.99</b>
<b>Group 2: Segment 2: Department</b>	<b>610 - Library</b>				
01-610-5112-000000	Library Salaries & Wages	282,899.00	-134,356.17	148,542.83	47.49
01-610-5400-000000	Library Expenses	33,000.00	-27,347.72	5,652.28	82.87
01-610-5580-000000	Library Books & Periodicals	78,000.00	-37,342.60	40,657.40	47.88
<b>Total Group 2: Segment 2: Department</b>	<b>610 - Library</b>	<b>393,899.00</b>	<b>-199,046.49</b>	<b>194,852.51</b>	<b>50.53</b>
<b>Group 2: Segment 2: Department</b>	<b>630 - Recreation</b>				
01-630-5112-000000	Recreation Dept Salaries & Wages	2,700.00	-1,357.50	1,342.50	50.28
01-630-5400-000000	Recreation Expenses	19,085.00	-3,375.00	15,710.00	17.68
<b>Total Group 2: Segment 2: Department</b>	<b>630 - Recreation</b>	<b>21,785.00</b>	<b>-4,732.50</b>	<b>17,052.50</b>	<b>21.72</b>
<b>Group 2: Segment 2: Department</b>	<b>631 - Mill Pond</b>				
01-631-5400-000000	Mill Pond Operating Expenses	2,100.00	0.00	2,100.00	0.00
<b>Total Group 2: Segment 2: Department</b>	<b>631 - Mill Pond</b>	<b>2,100.00</b>	<b>0.00</b>	<b>2,100.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	<b>635 - Bandstand</b>				
01-635-5200-000000	Bandstand Expenses	6,000.00	-4,446.00	1,554.00	74.10
<b>Total Group 2: Segment 2: Department</b>	<b>635 - Bandstand</b>	<b>6,000.00</b>	<b>-4,446.00</b>	<b>1,554.00</b>	<b>74.10</b>
<b>Group 2: Segment 2: Department</b>	<b>637 - Action Cove</b>				
01-637-5400-000000	Action Cove Expenses	3,000.00	0.00	3,000.00	0.00
<b>Total Group 2: Segment 2: Department</b>	<b>637 - Action Cove</b>	<b>3,000.00</b>	<b>0.00</b>	<b>3,000.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	<b>691 - Historical Commission</b>				
01-691-5400-000000	Historical Commission Expenses	600.00	-492.50	107.50	82.08
<b>Total Group 2: Segment 2: Department</b>	<b>691 - Historical Commission</b>	<b>600.00</b>	<b>-492.50</b>	<b>107.50</b>	<b>82.08</b>
<b>Group 2: Segment 2: Department</b>	<b>695 - Cultural Council</b>				
01-695-5400-000000	Cultural Council Expenses	100.00	0.00	100.00	0.00
<b>Total Group 2: Segment 2: Department</b>	<b>695 - Cultural Council</b>	<b>100.00</b>	<b>0.00</b>	<b>100.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	<b>710 - Debt</b>				
01-710-5910-000000	Maturing Debt	295,000.00	-295,000.00	0.00	100.00
<b>Total Group 2: Segment 2: Department</b>	<b>710 - Debt</b>	<b>295,000.00</b>	<b>-295,000.00</b>	<b>0.00</b>	<b>100.00</b>
<b>Group 2: Segment 2: Department</b>	<b>750 - Interest</b>				
01-750-5915-000000	Interest & Paydowns on Debt	5,900.00	-2,950.00	2,950.00	50.00
<b>Total Group 2: Segment 2: Department</b>	<b>750 - Interest</b>	<b>5,900.00</b>	<b>-2,950.00</b>	<b>2,950.00</b>	<b>50.00</b>
<b>Group 2: Segment 2: Department</b>	<b>911 - County Retirement</b>				
01-911-5170-000000	Essex Regnl Retirement Assess	805,420.00	-805,419.12	0.88	100.00
<b>Total Group 2: Segment 2: Department</b>	<b>911 - County Retirement</b>	<b>805,420.00</b>	<b>-805,419.12</b>	<b>0.88</b>	<b>100.00</b>

Group as: \*\*\_\*\*\*\_\*\*\*\*\_\*\*\*\*\*

Parameters: Fiscal Year: 2023 Start Date: 7/1/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Expenditure Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
<b>Group 2: Segment 2: Department</b>	913 - Workers Compensation				
01-913-5171-000000	Unemployment Insurance	1,500.00	0.00	1,500.00	0.00
<b>Total Group 2: Segment 2: Department</b>	913 - Workers Compensation	<b>1,500.00</b>	<b>0.00</b>	<b>1,500.00</b>	<b>0.00</b>
<b>Group 2: Segment 2: Department</b>	914 - Health Insurance				
01-914-5172-000000	Group Insurance	481,857.00	-198,370.84	283,486.16	41.17
<b>Total Group 2: Segment 2: Department</b>	914 - Health Insurance	<b>481,857.00</b>	<b>-198,370.84</b>	<b>283,486.16</b>	<b>41.17</b>
<b>Group 2: Segment 2: Department</b>	916 - Medicare				
01-916-5173-000000	F.I.C.A. Insurance	51,485.00	-22,657.32	28,827.68	44.01
<b>Total Group 2: Segment 2: Department</b>	916 - Medicare	<b>51,485.00</b>	<b>-22,657.32</b>	<b>28,827.68</b>	<b>44.01</b>
<b>Group 2: Segment 2: Department</b>	945 - Insurance				
01-945-5740-000000	Insurance & Bonds	199,865.00	-186,972.00	12,893.00	93.55
<b>Total Group 2: Segment 2: Department</b>	945 - Insurance	<b>199,865.00</b>	<b>-186,972.00</b>	<b>12,893.00</b>	<b>93.55</b>
<b>Total Group 1: Segment 1: Fund</b>	Code: 01 - General Fund	<b>17,291,818.21</b>	<b>-9,415,144.20</b>	<b>7,876,674.01</b>	<b>54.45</b>
	108 Account(s) totaling:	17,291,818.21	-9,415,144.20	7,876,674.01	54.45

Filter by: Segment 1: 01  
 Segment 2: 123, 145, 161, 210, 220, 240, 510

Parameters: Fiscal Year: 2023 Start Date: 07/01/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Revenue Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
01-123-4841-618001	Indirect costs water	0.00	53,954.00	53,954.00	0.00
01-145-4110-202200	PP Tax Revenue 2022	0.00	151.82	151.82	0.00
01-145-4110-202300	PP Tax Revenue 2023	0.00	141,962.11	141,962.11	0.00
01-145-4120-201500	Real Estate Tax Revenue - 2015	0.00	19.79	19.79	0.00
01-145-4120-201800	Real Estate Tax Revenue - 2018	0.00	123.76	123.76	0.00
01-145-4120-201900	Real Estate Tax Revenue - 2019	0.00	129.67	129.67	0.00
01-145-4120-202000	Real Estate Tax Revenue - 2020	0.00	134.11	134.11	0.00
01-145-4120-202100	Real Estate Tax Revenue- 2021	0.00	138.38	138.38	0.00
01-145-4120-202200	Real Estate Tax Revenue- 2022	0.00	33,454.47	33,454.47	0.00
01-145-4120-202300	Real Estate Tax Revenue- 2023	0.00	7,392,933.78	7,392,933.78	0.00
01-145-4142-000000	Tax Liens Redeemed	0.00	1,137.71	1,137.71	0.00
01-145-4150-201900	Motor Vehicle 2019	0.00	407.81	407.81	0.00
01-145-4150-202000	Motor Vehicle 2020	0.00	1,112.40	1,112.40	0.00
01-145-4150-202100	Motor Vehicle 2021	0.00	2,731.37	2,731.37	0.00
01-145-4150-202200	Motor Vehicle 2022	0.00	106,225.88	106,225.88	0.00
01-145-4161-202300	Boat Excise Revenue 2023	0.00	1,392.00	1,392.00	0.00
01-145-4170-000000	Penalties And Interest on Taxes	0.00	8,496.89	8,496.89	0.00
01-145-4171-000000	Penalties And Interest On Excise	0.00	8,771.49	8,771.49	0.00
01-145-4185-000000	CH41A Deferred Taxes	0.00	33,037.93	33,037.93	0.00
01-145-4321-000000	Municipal Lien Certificates	0.00	1,525.00	1,525.00	0.00
01-145-4360-000000	Rental - Town Other	0.00	2,260.00	2,260.00	0.00
01-145-4361-000000	Rental - Childrens Castle	0.00	86,240.00	86,240.00	0.00
01-145-4362-000000	Rental - Learning Tree	0.00	7,244.94	7,244.94	0.00
01-145-4820-000000	Earnings On Investments	0.00	12,227.56	12,227.56	0.00
01-145-4840-000000	Other Misc Revenue	0.00	35,389.87	35,389.87	0.00
01-145-4841-000000	Non-Recurring Misc Revenue	0.00	19,380.02	19,380.02	0.00
01-161-4324-000000	Misc Town Clerk Rev	0.00	1,821.00	1,821.00	0.00
01-161-4325-000000	Filing Fees	0.00	200.00	200.00	0.00
01-161-4370-000000	Other Departmental Revenue	0.00	242.00	242.00	0.00
01-161-4410-000000	Alcoholic Beverage Licenses	0.00	800.00	800.00	0.00
01-161-4420-000000	Other Licenses	0.00	740.00	740.00	0.00
01-161-4421-000000	Dog Licenses & Fees	0.00	395.00	395.00	0.00
01-161-4456-000000	Other Misc Permits	0.00	220.00	220.00	0.00
01-210-4322-000000	Police Reports	0.00	10.00	10.00	0.00
01-210-4323-000000	Police Serv Chg O/S Detail	0.00	889.80	889.80	0.00
01-210-4450-000000	Firearm & Related Permits	0.00	550.00	550.00	0.00

Parameters: Fiscal Year: 2023 Start Date: 07/01/2022 end: 12/31/2022

## Ledger History - Allocated Summary - Revenue Ledger

Account Number	Name	Allocated	Expended	Ending	% Var.
01-210-4770-000000	Court & Parking Fines	0.00	5,591.39	5,591.39	0.00
01-220-4451-000000	Fire Inspection/Permit Fees	0.00	1,950.00	1,950.00	0.00
01-240-4452-000000	Building & Occupancy	0.00	122,317.00	122,317.00	0.00
01-240-4453-000000	Wiring Permits	0.00	15,005.00	15,005.00	0.00
01-240-4454-000000	Plumbing & Gas Permits	0.00	9,361.00	9,361.00	0.00
01-240-4458-000000	Trench Excavation Permits	0.00	120.00	120.00	0.00
01-510-4455-000000	Septic- Perc- Wells- Misc Bd	0.00	7,226.79	7,226.79	0.00
	43 Account(s) totaling:	0.00	8,118,021.74	8,118,021.74	n/a

**Town Manager**

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**From:** DPW Projects  
**Sent:** Tuesday, January 10, 2023 8:50 AM  
**To:** NPau; Elizabeth Callahan; Arthur Wallace; Rick Parker; Mike Dacey; Elisa Grammer  
**Cc:** Town Manager; DPW Director; Pike, Leila; Sabulis, Mike  
**Subject:** FW: Expression of Interest (EOI) for MVP FY24 Action Grant  
**Attachments:** Final FY24 MVP EOI 01-09-23.pdf

Hi everyone,  
River Road MVP EOI was submitted yesterday. The answers in the form are all below, and I also created a stand-alone PDF of the complete submittal, which is attached. Thanks for all your comments and help along the way as I got up to speed. I'll let you know when they get back to us to set up a call.

Christine Wallace, P.E.  
DPW Program and Project Manager  
Town of West Newbury  
381 Main Street  
West Newbury, MA 01985  
978-363-1100 x130  
978-409-8009 (cell)  
[dpwprojects@wnewbury.org](mailto:dpwprojects@wnewbury.org)

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**From:** Kara Runsten <noreply+564ae721e98a8cbe@formstack.com>  
**Sent:** Monday, January 9, 2023 1:47 PM  
**To:** DPW Projects <dpwprojects@wnewbury.org>  
**Subject:** Expression of Interest (EOI) for MVP FY24 Action Grant



**Formstack Submission For: Expression of Interest (EOI) for MVP FY24 Action Grant**

Submitted at 01/09/23 1:46 PM

**Name of Lead Applicant (E.g., Town/City of XX):** Town of West Newbury

**Name of Supporting Applicants (e.g., Town/City of XX; if applicable):**

**Name of Contact:** Christine Wallace

<b>Contact Title and Agency/Department:</b>	DPW Program and Project Manager
<b>MVP Region:</b>	Northeast (Michelle Rowden)
<b>Phone:</b>	(978) 363-1100 ext. 130
<b>Email:</b>	<a href="mailto:dpwprojects@wnewbury.org">dpwprojects@wnewbury.org</a>
<b>Project Title:</b>	Evaluating NBS to Promote Resiliency: River Road
<b>Project summary::</b>	<p>Please also see supplemental attachment. The Town of West Newbury seeks MVP Action Grant funds to address flood risk and bank stability concerns at vulnerable locations along the Merrimack River. The Town is interested in evaluating the flood risk due to more frequent and extreme flooding events caused by climate change and sea level rise, and how this risk may affect residences, access to residences, and roadways. Specifically, the interest is along River Road and the lower portions of Coffin Street and Bridge Street where they intersect with River Road. This directly affects the Rocks Village Bridge, which is a critical connector to Haverhill and Merrimac, neighboring municipalities with EJ communities. Among other things, school buses serving West Newbury and Merrimac traverse this bridge, as do commuters and others from and to adjacent areas and beyond. Additionally, the Town seeks to proactively explore climate resiliency solutions to providing access to houses that may be impacted by road erosion and flooding. This assessment will allow Town officials and residents to better understand the timeline and locations of future flooding and explore both interim and long-term climate adaptation strategies. It also must understand the problem to plan and seek alternatives to foster resiliency. The proposed project consists of an existing conditions survey of the river bank and stormwater infrastructure, hydraulic modeling of the river and drainage systems to predict flooding and erosion vulnerabilities, development of conceptual plans for green shoreline stabilization and concepts for infrastructure improvements or adaptations, and</p>

	improve public and Town official understanding of future infrastructure vulnerability in order to plan climate-smart strategies.
<b>Address for Project Location (enter town hall address for town-wide projects):</b>	Town Office Building 381 Main Street West Newbury, MA 01985
<b>What climate impact(s) will this project address?:</b>	Coastal Erosion Coastal Flooding Ecological Changes Inland Flooding Severe winter storm, tropical storm, Nor'easter, tornado Other extreme weather
<b>Describe how this project will address identified climate hazard(s):</b>	This project is identified in the Town's MVP Final Report, which included River Road erosion (part of Item #7, Stormwater and flood management, operation & maintenance), and Develop/Improve/enforce stormwater Operation & Maintenance plan (part of Item #7, Stormwater and flood management, operation & maintenance). It also relates to the Final Report's Item #1, Emergency communications and communication infrastructure, inasmuch as the Rocks Village Bridge is vital to evacuation. As sea level rises and storms become more intense, vulnerable areas along River Road are increasingly at risk. This project will seek nature-based solutions in order to protect public infrastructure, access to evacuation routes, homes, and school buildings.
<b>Project Type:</b>	Type 1 - Planning, Assessment, Capacity Building & Regulatory Updates
<b>Approximate total population that will benefit from this project:</b>	Between 10,000 and 50,000
<b>Approximate geographic area served and/or project location::</b>	Region (multi-town)

**Please describe aspects of proposed project that will benefit EJ or Climate Vulnerable population(s):**

West Newbury does not contain an Environmental Justice community. However, the area of River Road near Bridge and Church Streets provides critical access to the Rocks Village Bridge, which connects to Haverhill and Merrimac, which are EJ communities. This bridge is important to residents throughout the area, and is particularly important in the bus routes used to access Whittier Regional Technical Vocational High School and Pentucket Regional High and Middle Schools, both of which serve EJ communities. Moreover, areas along the Merrimack serve a larger community and River Road attracts visitors from 40+ miles. Yankee Clipper Boat Tours run from downtown Haverhill to West Newbury, and may reach EJ communities. Youth that may be from adjacent EJ communities will be involved, gathering local oral history to inform resiliency strategies and community engagement/outreach.

**Are the impacted EJ and/or Climate Vulnerable population(s) supportive of the project? (Support should be demonstrated in the application-applicants should seek support/involvement now at the project idea phase.):**

Outreach about these projects has had a very positive reception. Residents strongly support this project and voted in favor of appropriating \$50,000 for the project at the November 2022 Town Meeting. Site walks have been conducted along River Road and members of the community not only attended but also have been actively participating in and supporting the grant request process. We continue to explore all outreach opportunities, including with students and others in EJ communities. Items under consideration include boat tours for students and members of various communities to better understand the riverbank and work with students including those participating in the Climate Café.

**Please describe how nature-based solutions (NBS) are incorporated into the overall vision of your project (or why they are not). Nature-Based Solutions (NBS) are adaptation measures focused on the protection, restoration, and/or management of ecological systems to safeguard public health, provide clean air and water, increase natural hazard resilience, and sequester**

This project proactively addresses future climate vulnerabilities by evaluating how the MORIS flooding models translates to River Road and adjacent areas. This early focus allows us to use green shoreline solutions, and provides time for Town officials and residents to consider and discuss longer term solutions for access to 55+ houses. It will involve an evaluation of existing conditions of the shoreline, identify areas suitable for living



<p><b>carbon. Incorporating NBS in local planning and design projects produces long-term solutions that benefit human and natural systems.:</b></p>	<p>shorelines, and prioritize nature-based strategies, including restoring river bank and wetland plant communities over hybrid or hardened shoreline solutions. Another aspect, conceptual plans for shoreline stabilization and infrastructure adaptation to flooding, again will emphasize green solutions to the maximum extent possible. Additionally, the project will enable West Newbury to understand timeline and extent of potential impacts, inform and prepare affected populations, and allow for planning that considers alternatives to River Road as it is now.</p>
<p><b>Estimated grant request::</b></p>	<p>Between \$150,000 and \$200,000</p>
<p><b>Anticipated project timeframe::</b></p>	<p>FY 24 and FY 25 (completed by June 30, 2025)</p>
<p><b>Keywords:</b></p>	<p>Stormwater Management  Energy Resilience  Climate Adaptation Plan  Trees and Forests  Inland Flooding  Redesign and Retrofit  Data and Mapping  Social Resilience  Watershed Management  Green Infrastructure  Nature-Based Solution  Civic Engagement  Public Outreach  Climate Education  Open Space Preservation  Stream Crossing  Culverts and Small Bridges  Coastal Flooding  Other: Civic Engagement, Nature-Based Solution, Coastal Flooding</p>
<p><b>Do you have any project-specific questions for MVP staff?:</b></p>	
<p><b>Optional: Upload a supporting document related to the project.:</b></p>	<p><a href="#">View File</a></p>

<b>After reading the above, are you interested in piloting MVP 2.0 in the FY24 round?:</b>	Yes
<b>Do you have any specific questions about participating in the MVP 2.0 pilot program?:</b>	Could MVP staff help facilitate partnering with other communities?
<b>Check the box below when you are ready to submit this form (this prevents the form from being submitted prematurely). You must also click the "submit form" button below.:</b>	<input type="checkbox"/> I am ready to submit.

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Formstack, 11671 Lantern Road, Suite 300, Fishers, IN 46038

## Rolling Expression of Interest (EOI) for MVP FY24 Action Grant



**MVP**

Municipal Vulnerability  
Preparedness

Eligible applicants can complete the form below to indicate interest in applying for FY24 MVP Action Grant funding. This process is optional but strongly encouraged and intended to provide potential applicants with feedback on their project ideas before submitting a formal application during the Request for Responses (RFR) period (tentatively expected to open end of March 2023).

EOI Timeline: We will review EOIs on a rolling basis. Earlier submissions will be prioritized for feedback with the MVP staff and will be given feedback from a wider range of state agencies. The deadline to submit this form for more detailed feedback is Friday, January 20, 2023. The final deadline to submit this form to receive more limited feedback is Friday, February 3, 2023.

Number of Submissions: Each applicant should limit EOIs submitted to a maximum of 2 (i.e., 2 different potential project ideas).

Anticipated Amount of Grant Funding to be Awarded in FY24 Round: ~\$20 million

Next Steps: MVP staff will contact you after submission of the EOI to discuss the project before the RFR is released. If for some reason you don't hear from us by March 2023, please reach out to your [MVP Regional Coordinator](#) directly.

Disclaimers:

- Please note that while this EOI process is provided as a courtesy to help create a competitive application. Positive feedback during the EOI stage does not guarantee that a project will ultimately be funded.
- This form is for informational purposes- not a formal application. As such, proposed dates and estimated cost amounts are non-binding.

**At the end of this form, you'll also be asked to indicate interest in participating in our new MVP 2.0 program. See the section at the end of this form for details.**

Interested applicants with additional questions regarding the MVP program are encouraged to contact their [Regional Coordinator](#).

### Contact Information:

Name of Lead Applicant (E.g., Town/City of XX)\*

**Town of West Newbury**

Name of Supporting Applicants (e.g., Town/City of XX; if applicable)

Name of Contact\*

**Christine**

**Wallace**

First Name

Last Name

Contact Title and Agency/Department

**DPW Program and Project Manager**

MVP Region\*

Northeast (Michelle Rowden) ▾

Phone

**(978) 363-1100 ext. 130**

Email\*

**dpwprojects@wnewbury.org**

## MVP Action Grant Project Idea

Note: Please reference [last year's scoring criteria](#) when thinking through whether your project will be competitive for the program. Competitive action grants align with MVP's [Core Principles](#).

Project Title\*

Evaluating NBS to Promote Resiliency: River Road

Maximum of 50 characters

Project summary:

Please also see supplemental attachment. The Town of West Newbury seeks MVP Action Grant funds to address flood risk and bank stability concerns at vulnerable locations along the Merrimack River. The Town is interested in evaluating the flood risk due to more frequent and extreme flooding events caused by climate change and sea level rise, and how this risk may affect residences, access to residences, and roadways. Specifically, the interest is along River Road and the lower portions of Coffin Street and Bridge Street where they intersect with River Road. This directly affects the Rocks Village Bridge, which is a critical connector to Haverhill and Merrimac, neighboring municipalities with EJ communities. Among other things, school buses serving West Newbury and Merrimac traverse this bridge, as do commuters and others from and to adjacent areas and beyond. Additionally, the Town seeks to proactively

Maximum of 350 words identifying goals and activities of the project.

Address for Project Location (enter town hall address for town-wide projects)\*

Town Office Building

Address Line 1

381 Main Street

Address Line 2

01985

ZIP Code

West Newbury

City

Massachusetts

State

What climate impact(s) will this project address?\*

- Coastal Erosion
- Coastal Flooding
- Drought
- Ecological Changes
- Extreme Heat
- Inland Flooding
- Landslide
- Severe winter storm, tropical storm, Nor'easter, tornado
- Other extreme weather
- Other:

It is possible to address more than one impact with a project.

Describe how this project will address identified climate hazard(s)

This project is identified in the Town's MVP Final Report, which included River Road erosion (part of Item #7, Sto

Maximum of 100 words

Project Type\*

- Type 1 - Planning, Assessment, Capacity Building & Regulatory Updates
- Type 2 - Design & Permitting
- Type 3 - Construction & On-the-ground Implementation

Please contact your Regional Coordinator with questions about the best fit for your project

Approximate total population that will benefit from this project\*

Between 10,000 and 50,000

Estimated number of individuals

Approximate geographic area served and/or project location:\*

Region (multi-town) ▼

Site specific projects will benefit a specific location on the scale of a single parcel or street. Neighborhood-scale projects will benefit multiple parcels and/or streets. Area projects will benefit multiple neighborhoods on the scale of a school district, voting ward, zoning district, etc. Town-wide projects benefit an entire town. Regional projects benefit more than one town.

### **Environmental Justice and Climate Vulnerable Populations**

**Environmental Justice** is defined as a census block group in which one or more of the following criteria is met, and as depicted the [Massachusetts EJ Viewer Map](#):

- the annual median household income is not more than 65% of the statewide annual median household income
- 40% or more of its population are minority, including individuals who identify themselves as Latino/Hispanic, Black/African American, Asian, Indigenous people, and people who otherwise identify as non-white
- 25% or more of households lack English language proficiency
- minorities comprise 25% or more of the population and the annual median household income of the municipality in which the neighborhood is located does not exceed 150% of the statewide annual median household income

**Climate Vulnerable Populations** are those who have lower adaptive capacity or higher exposure and sensitivity to climate hazards like flooding or heat stress due to factors such as access to transportation, income level, disability, racial inequity, health status, or age.

Please describe aspects of proposed project that will benefit EJ or Climate Vulnerable population(s).

**West Newbury does not contain an Environmental Justice community. However, the area of River Road near Bri**

Maximum of 150 words

Are the impacted EJ and/or Climate Vulnerable population(s) supportive of the project? (Support should be demonstrated in the application-applicants should seek support/involvement now at the project idea phase.)

**Outreach about these projects has had a very positive reception. Residents strongly support this project and vol**

Maximum of 150 words

Please describe how nature-based solutions (NBS) are incorporated into the overall vision of your project (or why they are not). Nature-Based Solutions (NBS) are adaptation measures focused on the protection, restoration, and/or management of ecological systems to safeguard public health, provide clean air and water, increase natural hazard resilience, and sequester carbon. Incorporating NBS in local planning and design projects produces long-term solutions that benefit human and natural systems.

**This project proactively addresses future climate vulnerabilities by evaluating how the MORIS flooding models tr**

Maximum of 150 words

Estimated grant request: \*

Between \$150,000 and \$200,000 ▼

Important note: Awardees must provide at least 25% of the total project cost with cash and/or in-kind contributions from non-state sources except for communities listed in Attachment N of the RFR that must provide 10%.

Anticipated project timeframe: \*

- FY 24 (completed by June 30, 2024)  
 FY 24 and FY 25 (completed by June 30, 2025)

#### Keywords

- Stormwater Management
- Energy Resilience
- Climate Adaptation Plan
- Trees and Forests
- Regulations, Zoning, Policy
- Inland Flooding
- Dam
- Redesign and Retrofit
- Data and Mapping
- Social Resilience
- Watershed Management
- Green Infrastructure
- Nature-Based Solution
- Environmental Justice
- Civic Engagement
- Public Outreach
- Climate Education
- Open Space Preservation
- Stream Crossing
- Culverts and Small Bridges

- Coastal Flooding
- Soils
- Other:

**Civic Engagement, Nature-Based Solution, Coastal Flooding**

Please select 1-3 key words that will be helpful in sorting your EOI for review

Do you have any project-specific questions for MVP staff?

Optional: Upload a supporting document related to the project.

FY24 MVP EOI Attachment-River Rd West Newbury.pdf

File uploads may not work on some mobile devices.

Make sure it is referenced in the project abstract and the file name is clear. File size cannot exceed 20 MB.

## Piloting MVP 2.0

**We are excited to pilot a new MVP planning program in the 2023 (FY24) grant round! The new MVP 2.0 program will provide communities with guaranteed upfront funding to:**

- **Expand their Core Team to include a more diverse array of community members in climate resilience planning and action**
- **Receive innovative virtual training on climate resilience best practices, equity, and environmental justice**
- **Reset priorities in their current MVP plans based on this new knowledge and engagement, and**
- **Receive technical assistance and guaranteed funding to develop and implement an action project.**

**Any community that has gone through the original MVP planning process and is interested can apply to pilot the program. If there is a lot of interest, we will prioritize municipalities whose MVP plans are 5 years old (completed in 2017/2018). Participating in the pilot will not affect Action Grant eligibility in the FY24 round. In the future, we do plan to require all communities to undergo the new program to maintain eligibility to apply to Action Grants, so you would be getting a head start! Your Regional Coordinator can provide more information on your EOI call.**

After reading the above, are you interested in piloting MVP 2.0 in the FY24 round? \*

- Yes
- No
- N/A

Do you have any specific questions about participating in the MVP 2.0 pilot program?

**Could MVP staff help facilitate partnering with other communities?**

Note we expect to hold a webinar on the program in the spring before the RFR is released.

Check the box below when you are ready to submit this form (this prevents the form from being submitted prematurely). You must also click the "submit form" button below. \*

- I am ready to submit.

[Save and Resume Later](#)

# FY 2024 MVP Action Grant Expression of Interest (EOI) Project Summary

Town of West Newbury, MA

January 9, 2023

## Evaluating Nature-Based Solutions (NBS) to Promote Resiliency: River Road, West Newbury

**The Town of West Newbury seeks MVP Action Grant funds to address flood risk and bank stability concerns at vulnerable locations along the Merrimack River.** The Town is interested in evaluating the flood risk due to more frequent and extreme flooding events caused by climate change and sea level rise, and how this risk may affect residences, access to residences, and roadways. Specifically, the interest is along River Road and the lower portions of Coffin Street and Bridge Street where they intersect with River Road. This directly affects the Rocks Village Bridge, which is a critical connector to Haverhill and Merrimac, neighboring municipalities with EJ communities. Among other things, school buses serving West Newbury and Merrimac traverse this bridge, as do commuters and others from and to adjacent areas and beyond. Additionally, the Town seeks to proactively explore climate resiliency solutions to providing access to houses that may be impacted by road erosion and flooding. This assessment will allow Town officials and residents to better understand the timeline and locations of future flooding and explore both interim and long-term climate adaptation strategies. It also must understand the problem to plan and seek alternatives to foster resiliency. The proposed project consists of an existing conditions survey of the river bank and stormwater infrastructure, hydraulic modeling of the river and drainage systems to predict flooding and erosion vulnerabilities, development of conceptual plans for green shoreline stabilization and concepts for infrastructure improvements or adaptations, and improve public and Town official understanding of future infrastructure vulnerability in order to plan climate-smart strategies.

**River Road (and adjacent Coffin, Church, and Bridge Streets, the latter being critical to Rocks Village Bridge access) has been identified through the MVP planning process as prone to flooding and vulnerable to erosion.** Portions of the road are very close to the bank of the Merrimack River, which is tidal in this stretch. In addition to vital bridge access, 55+ homes both on River Road and further inland will be impacted by increasingly intense storm events, rising sea levels and eroding banks at River Road and adjacent roadways and there is no alternative access to these homes. River Road is also a popular destination for public recreation such as biking, walking, running, and bird watching, drawing people from the region over forty miles away.

**The first phase of the project consists of an existing conditions survey of the river bank and stormwater infrastructure.** We will evaluate the condition of the existing shoreline, paying particular attention to areas with evidence of unstable banks, erosion, slumping, and document current land cover along the shore, including submerged aquatic plants that attenuate wave energy. We will identify areas suitable for fully green living shoreline solutions, focusing on strategies that both protect the road and restore Riverine bank and wetland habitat. We will also evaluate existing culverts and other potential surface water conveyances (i.e., drainage ditches) in the area of interest to identify conditions that may contribute to flooding.

**The next phase of the project consists of hydrologic and hydraulic modeling of the river and drainage systems to predict flooding and erosion vulnerabilities.** This task includes hydraulic modeling of the Merrimack River to evaluate flood vulnerability during increased precipitation events and coastal storms and to identify areas with relatively higher velocities where the riverbanks may be at risk of erosion. This phase also includes a hydrologic and hydraulic analysis of local streams and culverts that cross River Road, Coffin Street, or Bridge Street. This analysis will model culvert discharge rates, velocities, and flow depths.

**This last phase of the project will include development of concepts for green shoreline stabilization and concepts for infrastructure improvements.** We will prepare concepts for shoreline stabilization where deemed necessary. In areas identified as suitable for green or hybrid shoreline protection, a range of possible solutions will be considered that utilize native plant communities or naturally-occurring materials. We will also prepare concepts for increased resiliency of infrastructure elements at risk of future flooding. Options may include elevating roads, replacing/enlarging culverts, rerouting portions of the road, installing floodwalls, or other measures.

**Throughout the project, there will be significant community engagement and public education.** Residents strongly support this project and voted in favor of appropriating \$50,000 for the project at the November 2022 Town Meeting. We will host public meetings to allow the public to better understand future flood risk with models like those available through MORIS and what's developed during the assessment, update the public on the project progress and results, seek public input through surveys and during the community engagement events, and develop educational materials. We aim to work with Yankee Clipper Harbor Tours and Plum Island Kayaks to develop educational tours that feature nature of the Merrimack River and potential climate resiliency issues. In addition, we have commitments from grassroots organizations such as garden clubs, school district environmental clubs, West Newbury Wild and Native, and the Gulf of Maine Institute to assist with public engagement and promote stewardship activities that will increase resiliency. Public participation is also a component of the Hazard Mitigation Plan the Town is currently working on, which is timely in terms of coordinating additional funding for future project implementation.

**For additional information,** see the supplemental attachment for the proposed scope of work from GEI consultants, and also see the project webpage at: <https://www.wnewbury.org/home/town-projects/pages/river-road-climate-change-resiliency>





Consulting  
Engineers and  
Scientists

Revised August 5, 2022  
March 26, 2021  
Proposal 2101052

**Via email:** [rparker@wnewbury.org](mailto:rparker@wnewbury.org)

Mr. Rick Parker  
Town of West Newbury  
381 Main Street  
West Newbury, MA 01985

Dear Mr. Parker:

**Re: Proposed MVP Action Grant Tasks  
West Newbury MVP Action Grant  
West Newbury, Massachusetts**

GEI Consultants Inc. is pleased to present the Town of West Newbury Municipal Vulnerability Preparedness (MVP) Team with a suggested scope of work and task list to aid the Town in applying for an MVP Action Grant in 2023. It is our understanding that the Town of West Newbury is interested in evaluating the flood risk due to more frequent and extreme flooding events caused by climate change, and how this risk may affect residences, access to residences, and roadways. Specifically, we understand that the area of interest is along River Road and the lower portions of Coffin Street and Bridge Streets where they intersect with River Road. Additionally, the Town is concerned about erosion along the banks of the Merrimack River near River Road and the potential benefit of shoreline stabilization measures such as Living Shorelines.

The Town has asked for GEI's assistance in identifying task items and cost estimates for tasks that would support an MVP Action Grant addressing the flood risk and bank stability concerns summarized above. It is our understanding that these proposed tasks and cost estimates will help the Town determine the amount of funding to seek from an MVP Action Grant. Should the Town be awarded an MVP Action Grant in 2023, GEI will prepare a separate proposal in order to contract with the Town for these suggested tasks.

Our recommended tasks are based on our local knowledge of the Town of West Newbury, our correspondence with you via email, and our participation in the West Newbury MVP Team meetings on March 10, 2021 and May 10, 2022.

### **About GEI**

GEI is a consulting engineering firm specializing in geotechnical, environmental, water resources, and ecological services. GEI has an in-house staff of skilled and experienced environmental scientists, restoration ecologists, hydrologic and hydraulic modelers, and marine and geotechnical engineers with extensive coastal and riverine experience.

We are experts in resiliency and vulnerability studies in coastal and waterfront settings, utilizing robust coastal and riverine modeling to determine flood extents and erosion potential during increased storm conditions, future rates of precipitation, and projected sea level rise values.

GEI has significant experience in a wide range of Living Shoreline project types for a spectrum of spatial scales. GEI also has experience in combined approaches that couple structural elements with bioengineering techniques on the slope face and grading into a fully vegetated transition area at the top of the slope. GEI has found this technique to be a successful solution in challenging and dynamic coastal and riverine systems where Living Shorelines alone would not be sufficient in preventing erosion. We strive to assemble the most appropriate mix of Living Shoreline techniques for each given site.

We have included project sheets for key projects similar to what we are proposing for the Town of West Newbury and resumes for staff members that would be involved in this project.

### **Suggested MVP Action Grant Tasks**

We recommend that the following task items be included when considering an MVP Action Grant for the Town of West Newbury. Depending on funding availability, the Town of West Newbury could choose to undertake some or all of the suggested tasks as well as consider options for phasing the tasks over multiple grant awards.

#### ***Task 1: Community Engagement***

This task includes presentations at up to three public meetings, creation of public surveys to be utilized during the two community engagement events, and development of educational materials such as pamphlets, flyers, and/or website language. GEI has worked on many grant-funded municipal projects and is experienced in leading the public process to ensure all related parties are active participants in the project. The MVP program places a strong emphasis on community engagement and GEI would collaborate with the Town of West Newbury MVP Team to ensure that project goals are clearly communicated to the public and seek public input, as warranted, on important project milestones and decisions. Per our discussion on May 10, 2022, we assume that the West Newbury MVP committee will schedule, lead, and coordinate the public meetings that GEI will participate in. For the purposes of cost estimation, we assume there will be three community engagement presentations that GEI will participate in.

##### **Task 1.1: Public Meeting #1**

The first public meeting will be held at the beginning of the project to go over project goals, tasks, and a projected timeline for the project.

Deliverables: Memorandum with presentation slides, meeting materials, and meeting minutes.

##### **Task 1.2: Public Meeting #2**

The second public meeting will be held after the completion of Task 4, the Vulnerability Study. During this meeting, results of the vulnerability study will be communicated as well as an updated timeline for the remainder of the project.

Deliverables: Memorandum with presentation slides, meeting materials, and meeting minutes.

**Task 1.3: Public Meeting #3**

The third public meeting will be held after the completion of the remaining tasks. Here, we will communicate the overall project goals, findings, and recommendations for adaptation options, as well as recommending next steps the community can take towards increasing resilience.

Deliverables: Memorandum with presentation slides, meeting materials, and meeting minutes.

**Task 2: Existing Conditions of Shoreline Survey**

Evaluate the condition of the existing shoreline, paying particular attention to areas with evidence of unstable banks, erosion, slumping, and document current land cover along the shore (such as vegetation, exposed soil or bedrock, and man-made stabilization such as rip rap retaining walls, log jams, live staking and other bio-engineering methods). Shoreline gradient (i.e., slope of bank), height of bank, presence of a fringing marsh, and distance of nearest structures to the shoreline will also be documented. We will also identify structures in the river such as docks, noting whether these structures appear to be permanent or temporary. The shoreline conditions will be documented using a combination of drone footage, field visits, GIS data compilation, and historical map and imagery review. As part of this task, GEI will also identify and inventory areas suitable for fully green living shoreline solutions, areas likely requiring a hybrid solution that combines vegetation with hard armoring, and areas likely requiring a hardened shoreline such as rip rap or a retaining wall. Documenting the existing conditions provides GEI with a strong foundation moving forward in the project and ensures that we understand conditions specific to West Newbury. Our field staff is trained and licensed in operating drones and watercraft to observe hard to access locations. Drone footage of real-time uses and operations of shorelines and slopes, such as the interactions with currents and waves, the launching of watercraft, and local boat traffic patterns, has proved beneficial in acquiring comprehensive knowledge of conditions and uses of waterfront locations.

Task 2 Deliverables: Technical memo of findings to include figures documenting shoreline conditions and digital files of drone footage.

**Task 3: Existing Conditions of Culverts Survey**

This task consists of evaluating the condition of existing culverts and other potential surface water conveyances (i.e., drainage ditches) in the area of interest. The purpose of the investigation would be to assess the capacity limits of existing culverts and identify areas where flow may be constricted, and/or where culvert conditions may contribute to current or future flooding. GEI field staff will visit the site during a rainfall event to observe how culverts perform during storm conditions.

Task 3 Deliverables: Technical memo of findings to include tables detailing existing conditions of culverts and a figure of culvert locations.

**Task 4: Vulnerability Study****Task 4.1: Merrimack River Flood Risk Analysis**

This task involves the creation of a hydraulic model of the Merrimack River to evaluate flood vulnerability during increased precipitation events and coastal storms and to identify areas with relatively higher velocities where the riverbanks may be at risk of erosion. We propose using the U.S. Army Corps of Engineers Hydraulic Engineering Center River Analysis System (HEC-RAS) software to perform this work. As part of our modeling effort we would include precipitation,

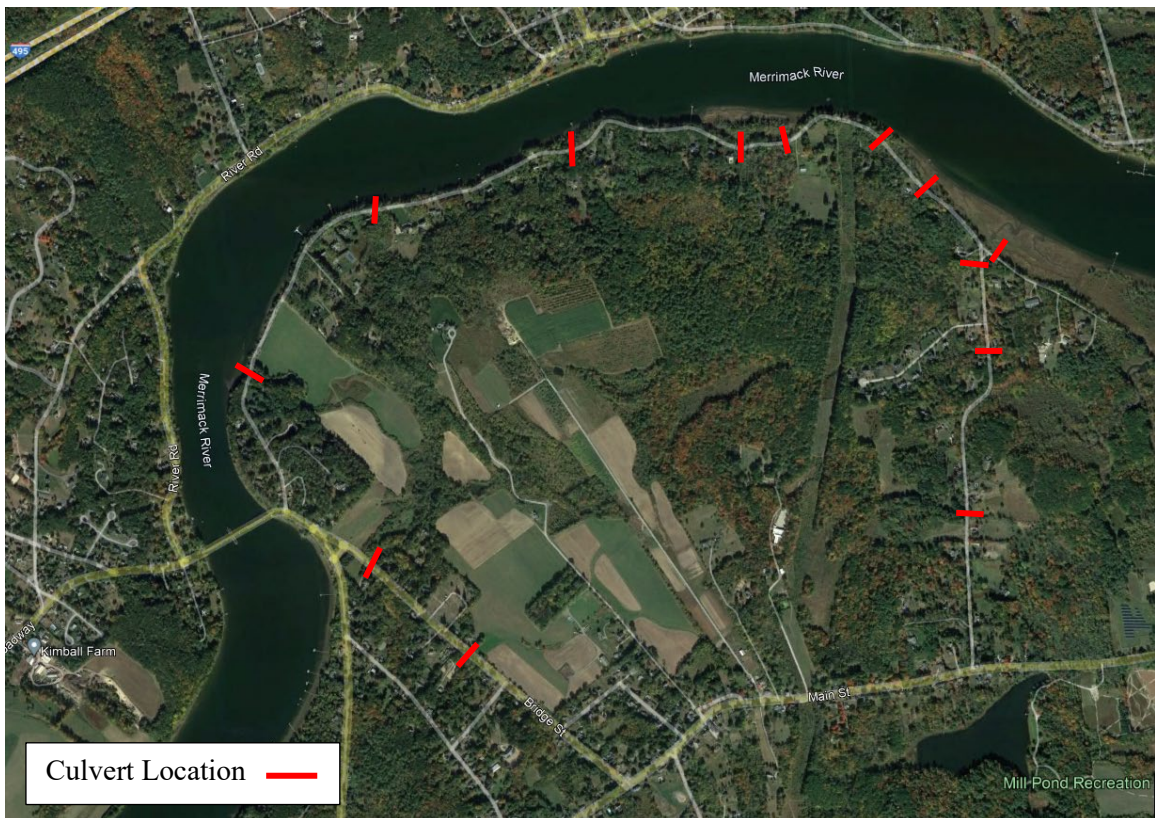
both historic amounts as well as future trends and predictions; tidal influences under existing average and storm tide cycles and future tide cycles given assumed sea level rise amounts based on the latest state guidance for the State of Massachusetts. This hydraulic model would provide information on anticipated future flood events, changes to average river flows, and sections of the river with the potential for high velocities that would potentially cause issues for river channel and shoreline stabilization. Areas identified as having higher river velocities will be compared with the shoreline survey completed in Task 2 to determine the focus for shoreline stabilization efforts and areas identified to have current and future flood risk based on the modeling efforts will be the focus for flood adaptation measures developed in Task 6.

Task 4.1 Deliverables: Technical memo of vulnerability study and figures of flood inundation boundaries.

**Task 4.2: River Road Flood Risk Analysis**

This task will include a hydrologic and hydraulic analysis of local streams and culverts that cross River Road, Coffin Street, or Bridge Street. Based on a review of aerial imagery, MassDEP Wetlands dataset, and USGS’ StreamStats web application we have identified at least 13 possible culvert crossings to be included in the analysis. The proposed culvert locations to be analyzed are shown in the figure below:

**Figure 1: Culvert Crossing Locations**



We will delineate the watersheds using the readily available online digital elevation data and assess the hydrologic characteristics using available GIS data. We intend to use the Soil Conservation Service (SCS) Runoff Curve Number (CN) Method to model infiltration. To calculate the weighted curve numbers, we will use Hydrologic Soil Group (HSG) data obtained

from the NRCS Web-Soil Survey online tool and land cover (forest, impervious, grassland, etc.) data from MassGIS' 2016 Land Cover/Land Use dataset. Our work will also include developing Unit hydrographs and time of concentration estimates for the watersheds using the SCS Unit hydrograph transform method.

GEI will use information obtained in Task 3, such as culvert length, diameter, material, and relative culvert and roadway elevations, to develop a HEC-HMS model to estimate culvert discharge and depths of flow for the 2-, 5-, 10-, 25-, 50- and 100-year annual recurrence 24-hour storm events.

Precipitation estimates for the selected events will be obtained from the National Oceanic and Atmospheric (NOAA) Atlas 14 Precipitation Frequency Data Server.

Task 4.2 Deliverables: Technical memo of H&H analysis including information on each crossing's hydraulic capacity during selected storm events. The memo will also identify culvert crossings at risk of inundation during design storms.

#### ***Task 5: Conceptual Plans for Shoreline Stabilization***

In this task, GEI will evaluate concepts for shoreline stabilization for up to three areas where shoreline instability was observed during Task 2. In areas identified as suitable for green or hybrid shoreline protection, a range of possible solutions will be considered that utilize native or naturally occurring materials such as plantings and logs, along with stone and timber elements, as required. GEI will develop up to two conceptual approaches at each of the three sites identified, for six total concept design plans. Plans will be conceptual in nature to enable planning and budgeting for future phases of formal design, permitting, and construction. In addition to many Living Shorelines solutions that GEI has designed for waterfront communities within the Northeast and Mid-Atlantic, GEI has worked on shoreline stabilization projects with Living Shorelines elements along the Merrimack River and is familiar with the local riverine and shoreline environment.

Task 5 Deliverables: Technical memo summarizing concept plans and development and conceptual plans of shoreline stabilization measures.

#### ***Task 6: Conceptual Plans for Infrastructure Adaptation to Flooding***

GEI has had the opportunity to work on many municipal vulnerability and adaptation projects, utilizing both our modeling staff and waterfront design team. We strive to create designs to ensure that communities can continue to use their assets well into the future and during storm conditions. This task would evaluate concepts for increased resiliency of infrastructure elements at risk of future flooding. Options may include elevating roads, replacing/enlarging culverts, installing floodwalls, or other related measures. Plans generated as part of this effort will be conceptual in nature but suitable to enable planning and budgeting for future phases of formal design, permitting, and construction. We assume that we will develop two roadway design concepts, two floodwall design concepts, and two culvert design concepts.

Task 6 Deliverables: Technical memo summarizing concept plans and development and conceptual plans for up to three infrastructure categories (roads, culverts, seawalls, etc.) with up to two conceptual plans each.

### **Task 7: Project Management and Meetings**

This task encompasses time for regularly scheduled meetings with the project committee, project oversight, and MVP Action Grant invoicing requirements.

GEI will plan on attending the ongoing monthly meetings with the project committee under the assumption that the project will span 10 months for an estimate of 10 monthly meetings, including a project kickoff meeting at the beginning of the project and a project closing meeting at the completion of the project.

Additionally, GEI will assist the Town of West Newbury with project oversight to include required correspondence with granting authorities. We will draw on our staff's experience with state and federally funded projects to support an effective process of managing funding agency requirements.

This task will include preparation of monthly invoices that meet grant requirements for reimbursement.

Task 7 Deliverables: Monthly invoices

### **Project Team**

The key personnel for this project have been chosen based on their experience with flood vulnerability studies and shoreline stabilization projects. Leila Pike, P.E. will be the Project Manager and Lead Engineer responsible for the Flood Risk Analysis. Mike Sabulis, LSP will assist in Project Management and grant requirements. Lissa Robinson, P.E., will serve as senior advisor of the flood risk analysis. Dan Bannon, P.E., will be the senior designer leading the shoreline stabilization and infrastructure adaptation design. Barney Baker, P.E., will be the senior advisor on the shoreline stabilization and design aspects for this project. Marc Chmura, Amanda Barnett, Emily Jarret, and Dan Pelletier will assist with compiling data, performing analyses, field work, and preparing results. Brenda Pinkham will assist with report and figure preparation.

### **Cost Estimate and Schedule**

Based on GEI's expertise in executing the tasks described above, we have developed the following cost estimate ranges:

<b>Task</b>	<b>Cost Estimate</b>
<b>Task 1: Community Engagement</b>	\$18,000
<b>Task 2: Existing Conditions of Shoreline Survey</b>	\$12,000
<b>Task 3: Existing Conditions of Culverts Survey</b>	\$8,000
<b>Task 4: Merrimack River Flood Risk Analysis</b>	\$55,000
<b>Task 5: Conceptual Plans for Shoreline Stabilization</b>	\$43,000
<b>Task 6: Conceptual Plans for Infrastructure Adaptation to Flooding</b>	\$36,000
<b>Task 7: Project Management and Meetings</b>	\$21,000
<b>Total:</b>	<b>\$193,000</b>

These costs are subject to change if revisions to the Scope of Work are made after conversations with the Town of West Newbury and/or after the grant is awarded.

If the Town of West Newbury is awarded an MVP Action Grant, we anticipate a project start in mid-September 2023 with a project completion by the end of June 2024. We have attached a project schedule which is subject to change based on the actual project start date and any revisions to scope of work between now and when the contract begins.

**Limitations**

These suggested tasks for an MVP Action Grant for the Town of West Newbury and the accompanying cost estimates were prepared for the use of the Town of West Newbury, exclusively, including its submission for MVP Grants. The opinions, cost estimates, and conclusion presented in this letter are based solely on the information exchanged through emails and during the MVP Team Meetings on March 10, 2021 and May 10, 2022. Additional information regarding the project area that was not available to us may result in a modification of tasks and cost estimates.

If the grant is awarded to the Town, we will prepare a separate scope of work and cost estimate which will include a Standard Professional Services Agreement.

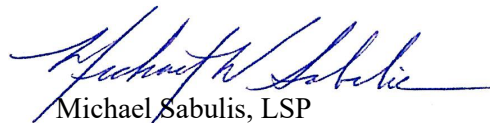
We appreciate this opportunity to support the Town of West Newbury in acquiring MVP Action Grants. We are happy to discuss the options above, provide additional tasks that you would like to include, and/or revise tasks as shown. Please reach out should you have any questions.

Sincerely,

GEI CONSULTANTS, INC.



Leila A. Pike, P.E.  
Civil Engineer/Project Manager



Michael Sabulis, LSP  
Senior Project Manager

LAP/MWS:bdp

Attachment: Project Schedule

B:\Working\WEST NEWBURY, TOWN OF\Proposals\2101052 Shoreline Vulnerability Study\Rev July 2022\REVISED West Newbury Scope and Cost Estimate\_2022-08-05.docx

**PROJECT SCHEDULE**  
**West Newbury MVP Action Grant**  
**West Newbury, Massachusetts**

GEI TASK	Weeks																																							
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38		
	18-Sep	25-Sep	2-Oct	9-Oct	16-Oct	23-Oct	30-Oct	6-Nov	13-Nov	20-Nov	27-Nov	4-Dec	11-Dec	18-Dec	25-Dec	1-Jan	8-Jan	15-Jan	22-Jan	29-Jan	5-Feb	12-Feb	19-Feb	26-Feb	4-Mar	11-Mar	18-Mar	25-Mar	1-Apr	8-Apr	15-Apr	22-Apr	29-Apr	6-May	13-May	20-May	27-May	3-Jun		
1. Public Meetings			Meeting															Meeting																			Meeting			
2. Existing Conditions of Shoreline Survey		Active	Active	Active	Active	Active																																		
3. Existing Conditions of Culvert Survey		Active	Active	Active	Active	Active																																		
4. Vulnerability Study		Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	
5. Conceptual Plans for Shoreline Stabilization																		Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	
6. Conceptual Plans for Infrastructure Adaptation to Flooding																		Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	Active	
7. Final Report																																					Active	Active	Active	Active
8. Project Management/Monthly Meetings	Meeting	Active	Active	Active	Meeting	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active	Active	Meeting	Active	Active		

**LEGEND**  
 GEI Active Time   
 Meetings

**NOTES:**  
 1. Assumes an award date of August 5, 2022. Schedule may shift based on actual project award date.  
 2. Progress meetings subject to change based on client and project needs.



**FULL RESPONSES UNABLE TO SEE ON FORM**

(not submitted as attachment but for use in PDF stand-alone document)

**DESCRIBE HOW THIS PROJECT WILL ADDRESS IDENTIFIED CLIMATE HAZARDS**

This project is identified in the Town's [MVP Final Report](#), which included River Road erosion (part of Item #7, Stormwater and flood management, operation & maintenance), and Develop/Improve/enforce stormwater Operation & Maintenance plan (part of Item #7, Stormwater and flood management, operation & maintenance). It also relates to the Final Report's Item #1, Emergency communications and communication infrastructure, inasmuch as the Rocks Village Bridge is vital to evacuation. As sea level rises and storms become more intense, vulnerable areas along River Road are increasingly at risk. This project will seek nature-based solutions in order to protect public infrastructure, access to evacuation routes, homes, and school buildings.

**PLEASE DESCRIBE ASPECTS OF PROPOSED PROJECT THAT WILL BENEFIT EJ OR CLIMATE VULNERABLE POPULATION(S)**

West Newbury does not contain an Environmental Justice community. However, the area of River Road near Bridge and Church Streets provides critical access to the Rocks Village Bridge, which connects to Haverhill and Merrimac, which are EJ communities. This bridge is important to residents throughout the area, and is particularly important in the bus routes used to access Whittier Regional Technical Vocational High School and Pentucket Regional High and Middle Schools, both of which serve EJ communities. Moreover, areas along the Merrimack serve a larger community and River Road attracts visitors from 40+ miles. Yankee Clipper Boat Tours run from downtown Haverhill to West Newbury, and may reach EJ communities. Youth that may be from adjacent EJ communities will be involved, gathering local oral history to inform resiliency strategies and community engagement/outreach.

**ARE THE IMPACTED EJ AND/OR CLIMATE VULNERABLE POPULATION(S) SUPPORTIVE OF THE PROJECT? (SUPPORT SHOULD BE DEMONSTRATED IN THE APPLICATION—APPLICANTS SHOULD SEEK SUPPORT/INVOLVEMENT NOW AT THE PROJECT IDEA PHASE.)**

Outreach about these projects has had a very positive reception. Residents strongly support this project and voted in favor of appropriating \$50,000 for the project at the November 2022 Town Meeting. Site walks have been conducted along River Road and members of the community not only attended but also have been actively participating in and supporting the grant request process. We continue to explore all outreach opportunities, including with students and others in EJ communities. Items under consideration include boat tours for students and members of various communities to better understand the riverbank and work with students including those participating in the Climate Café.

**PLEASE DESCRIBE HOW NATURE-BASED SOLUTIONS (NBS) ARE INCORPORATED INTO THE OVERALL VISION OF YOUR PROJECT (OR WHY THEY ARE NOT). NATURE-BASED SOLUTIONS (NBS) ARE ADAPTATION MEASURES FOCUSED ON THE PROTECTION, RESTORATION, AND/OR MANAGEMENT OF ECOLOGICAL SYSTEMS TO SAFEGUARD PUBLIC HEALTH, PROVIDE CLEAN AIR AND WATER, INCREASE NATURAL HAZARD RESILIENCE, AND SEQUESTER CARBON.**

**INCORPORATING NBS IN LOCAL PLANNING AND DESIGN PROJECTS PRODUCES LONG-TERM SOLUTIONS THAT BENEFIT HUMAN AND NATURAL SYSTEMS.** This project proactively addresses future climate vulnerabilities by evaluating how the MORIS flooding models translates to River Road and adjacent areas. This early focus allows us to use green shoreline solutions, and provides time for Town officials and residents to consider and discuss longer term solutions for access to 55+ houses. It will involve an evaluation of existing conditions of the shoreline, identify areas suitable for living shorelines, and prioritize nature-based strategies, including restoring river bank and wetland plant communities over hybrid or hardened shoreline solutions. Another aspect, conceptual plans for shoreline stabilization and infrastructure adaptation to flooding, again will emphasize green solutions to the maximum extent possible. Additionally, the project will enable West Newbury to understand timeline and extent of potential impacts, inform and prepare affected populations, and allow for planning that considers alternatives to River Road as it is now.