

Kenneth M. Kellogg
First Selectman

Town of Monroe



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Date: January 14, 2019
To: Frank Lieto, Town Council Chairman
cc: Mike Manjos, Board of Finance Chairman
Donna Lane, Board of Education Chairman
Jack Zamary, Superintendent of Schools
From: Kenneth M. Kellogg, First Selectman
Subject: **Proposal Regarding Budget Adoption Dates**

As a follow-up to my earlier communication on this subject, I have conducted further analysis regarding this concept, including discussions with our Town Attorney, Finance Department, Assessor, Registrar of Voters, the Tax Collector and Town Clerk. I respectfully submit this proposal for your consideration.

First, I want to be absolutely clear that the referendum process itself is NOT up for consideration. Public Act 18-12 allows for the modification of dates only, not the process. Regardless, I have no intention of making any such recommendation.

My proposal is to maintain the existing dates up to and including the date the First Selectman must deliver a budget to the Town Council, and to extend the remaining dates to provide:

- An additional month for the public to participate in the budget process.
- More flexibility in the scheduling of Town Council and Board of Finance meetings for both the operating and capital budgets.
- The ability for a final budget to be presented at referendum that is based on greater due diligence and fewer assumptions, as referenced in my prior memo.

Specifically, my proposal is to amend these adoption dates as follows:

- Town Council to forward budget as proposed to Board of Finance: Change from February 28 to March 15.
- Board of Finance delivers its final proposed budget to First Selectman: Change from March 21 to April 20.
- Annual Budget Referendum: Change from the first Tuesday in April to the first Tuesday in May.
- Date of the second referendum, if required: Change from three weeks from first referendum to two weeks from first referendum.

	FIRST SELECTMAN	→	TOWN COUNCIL	→	BOARD OF FINANCE	→	FIRST SELECTMAN PUBLISHES TO VOTERS	→	REFERENDUM	→	IF REJECTED								
											FIRST SELECTMAN MEETING WITH TC, BOF, BOE	→	SECOND REFERENDUM	→	EACH SUBSEQUENT REFERENDUM				
CURRENT:	2/8		20 DAYS		2/28		21 or 22 DAYS		3/21		11 - 17 DAYS		1 st Tue in April		14 DAY WINDOW		4 th Tue in April		2 Weeks
PROPOSED:	2/8		35 or 36 DAYS		3/15		36 DAYS		4/20		11 - 17 DAYS		1 st Tue in May		7 DAY WINDOW		3 rd Tue in May		2 Weeks

While the amendment of our Charter would apply to all future years (unless subsequently amended), I have attached a 2019 calendar to further illustrate the impact of these changes in the current budget cycle. The revised schedule allows for up to four referenda prior to the end of the fiscal year. Over the last eleven years, the Town has passed its budget in three or less votes.

Again, I thank you for your consideration in this regard.

January 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2 DEPARTMENTS DUE TO FIRST SELECTMAN	3	4	5
6	7	8	9 BOARD OF ED DUE TO FIRST SELECTMAN	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

April 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2 REFERENDUM #1	3 NOTE: If Rejected, First Selectman Meets with TC, BOF, BOE prior to Ref. #2	4	5	6
7	8	9	10	11	12	13
14	15 NOTE: Estimated Date for Firm Medical Insurance Rates	16	17	18 FIRST SELECTMAN REVISED BUDGET PUBLISHED	19	20 BOARD OF FINANCE RETURN TO FIRST SELECTMAN
21	22	23 REFERENDUM #2	24	25	26	27
28	29	30 NOTE: Typical Extention for Finalized Grand List (After Appeals)				

February 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6 NOTE: Anticipated Proposed State Budget from Governor (Usual)	7	8 FIRST SELECTMAN DUE TO TOWN COUNCIL	9
10	11	12	13	14	15	16
17	18	19	20 NOTE: Anticipated Proposed State Budget from Governor (2019)	21	22	23
24	25	26	27	28 TOWN COUNCIL DUE TO BOARD OF FINANCE		

May 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2 FIRST SELECTMAN PUBLISHES FOR: REFERENDUM #3 REFERENDUM #1	3	4
5	6	7 REFERENDUM #3 REFERENDUM #1	8 NOTE: If Rejected, First Selectman Meets with TC, BOF, BOE prior to Ref. #2	9	10	11
12	13	14	15	16 FIRST SELECTMAN REVISED BUDGET PUBLISHED	17	18
19	20	21 REFERENDUM #4 REFERENDUM #2	22	23	24	25
26	27 NOTE: Memorial Day	28	29	30 FIRST SELECTMAN REVISED BUDGET PUBLISHED	31	

March 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15 TOWN COUNCIL DUE TO BOARD OF FINANCE	16
17	18	19	20	21 BOARD OF FINANCE RETURN TO FIRST SELECTMAN	22	23
24	25	26	27	28 FIRST SELECTMAN FINAL BUDGET PUBLISHED	29	30
31 NOTE: Potential Finalized Grand List (After Appeals)						

June 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4 REFERENDUM #5 REFERENDUM #3	5	6	7	8
9	10	11	12	13 FIRST SELECTMAN REVISED BUDGET PUBLISHED	14	15
16	17	18 REFERENDUM #6 REFERENDUM #4	19	20	21	22
23	24	25	26	27	28	29
30						

PROPOSED BUDGET ADOPTION DATE AMENDMENTS – 2019 IMPACT

 = CURRENT DATES  = PROPOSED DATES