

## MEMO

**From:** Financial Planning Committee  
**To:** The Natick Select Board  
**Date:** February 15, 2020  
**Subject:** *Recommendation of Date of Potential Operating Override*

### **Consensus Recommendation**

On Wednesday, February 4, 2020, the Financial Planning Committee ("FPC") decided, by consensus, to recommend to the Select Board that any potential operating override for Fiscal Year 2022 be placed on the ballot at the regular town-wide election in March 2021.

This consensus followed lengthy discussion over the course of two FPC meetings. There was a general agreement that the date should not be predicated to gain supposed advantage for passage or non-passage, but rather scheduled on a date at which the Town is prepared to disseminate information, that gives the Town sufficient time to implement the will of the electorate, and at which the largest informed electorate could be assumed to be coming to the polls.

The two main options considered, November 2020 and March 2021, each has advantages and disadvantages; but that on balance, March 2021 is considered to be the better option. A special election was also discussed but was not pursued due to the additional costs.

The following tables provide a summary of the FPC's discussions:

<b>November 2020</b>	
Pro	<ul style="list-style-type: none"><li>• We have momentum now; a near date would remove any opportunity to procrastinate.</li><li>• A November election would give the Town the maximum amount of time after the election to implement the voters' will: the FY 2022 budget could be prepared on its regular schedule.</li><li>• Turnout for the Presidential election is likely to be significant, and certainly well beyond what might be expected in March; a November 2020 vote puts the decision in the hands of the most voters, and therefore could be considered the most democratic.</li></ul>
Con	<ul style="list-style-type: none"><li>• For a November 2020 election, staff and their bandwidth would be challenged to prepare two full budgets during the spring of 2020 to provide voters with a clear contrast.</li><li>• Several required determinations, including the form, amount(s), and wording of the ballot question(s), would be required to be definitively concluded by staff and the Select Board no later than early July 2020 in accordance with the timing requirements established by the Secretary of State; this would strain staff capacity and potentially limit outreach opportunities. In addition, the Town's books for FY 2020 will not be closed prior to this point in time.</li><li>• The preparation timing for a November 2020 ballot question relies in no small part on a shorter-than-average 2020 Spring Annual Town Meeting.</li><li>• Although Natick's fiscal projections have in the past proven accurate, certain financial data points will not be solidified by that time; as examples, Free Cash wouldn't be certified by the time a prospective FY 2022 budget were to be built in early summer 2020, the</li></ul>

	<p>Governor's budget and projected state aid would not be available, healthcare numbers wouldn't be known, nor would be the disposition of Title I funding and state education funding under the Student Opportunity Act.</p> <ul style="list-style-type: none"> <li>● Although turnout is likely to be large in November, anecdotal input from individuals involved in previous operational override questions in other communities postulates that voters' minds are less likely to be on town issues.</li> <li>● Time for educating voters would be short, and there would be a lot of competition for voters' attention.</li> </ul>
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<b>March 2021</b>	
Pro	<ul style="list-style-type: none"> <li>● Staff and committees would have a more reasonable amount of time to prepare the two alternative FY 2022 budgets during the normal budget cycle process, as well as more thoroughly evaluate the form and structure of the ballot question(s).</li> <li>● The level of awareness among residents is at least partially a function of time; staff and committees would have longer to effectively communicate with residents so they can cast an informed vote.</li> <li>● In March, voters will be more apt to have the time and attention necessary to devote to the override issue; it won't go unnoticed, and therefore can be considered the most transparent approach.</li> <li>● By March, voters will have had more time to adjust to the tax increases from the recent Debt Exclusions.</li> <li>● March allows more time and possible opportunities for community involvement.</li> <li>● More precise fiscal data would be known (healthcare costs, etc.) by March.</li> </ul>
Con	<ul style="list-style-type: none"> <li>● A March election leaves no fallback if an override question fails, although committee members agreed that a 'second bite at the apple' was not a palatable option.</li> <li>● Turnout is likely to be lower at a March 2021 election compared to a Presidential election in November 2020.</li> </ul>

Having weighed each of these considerations at length, the FPC collectively came to a consensus that an informed electorate is a critical and necessary element to either a positive or negative outcome; to that end, a March 2021 election optimized the Town's ability to do a thorough job of preparation and communication, and electorate's ability to consider options with the fewest barriers.