Middlesex Budget Committee

Budget Lessons Learned Meeting

Tuesday, July 21st, 2026

4:00 PM

Present: Sam Beaudoin, Dorinda Crowell, Elias Gardner, Mark Harris, and Matt Rkiouak

Guest: Bill Preis, Susan Clark

Key Outcomes:

The Budget Committee conducted a lessons-learned review of the annual budget process, identifying communication gaps and process inefficiencies as the primary failure points. Key consensus: earlier and broader public engagement is critical, the current budget timeline is too compressed, and clearer role definitions between the Budget Committee and Select Board are needed. The group agreed to pursue a multi-year Capital Improvement Plan (CIP), expand outreach strategies, and schedule a dedicated meeting with the Select Board.

Decisions Made

- **Budget process documentation:** No formal written process currently exists defining roles between the Budget Committee and Select Board — acknowledged as a gap requiring resolution.
- **Multi-year CIP:** Committee will pursue a 5–10 year capital planning horizon and hold a standalone meeting to develop it.
- **August meeting retained:** Regular August meeting confirmed (Tuesday, August 18, 4 PM) — originally planned to skip.
- **Budget framing:** Consensus to separate fixed/obligatory line items from discretionary ones to simplify public understanding.

What Went Well

- The capital budget framework and skeleton were completed 6+ weeks before presentation to the Select Board.

- There was effective collaboration with the Select Board during what was the most challenging budget process to-date.
- There was proactive communication via Front Porch Forum and Matt's website, which generated meaningful public interest ahead of the 11.6% increase, identifying key items of interest to voters.
- The committee held broader, more candid internal discussions about long-term budget direction — including whether large increases might sometimes be appropriate given years of underspending.

What Didn't Go Well

- The Town Administrator position and related staffing changes were not communicated early enough, triggering public backlash that could have been avoided.
- Public engagement relied on open Select Board meetings that most concerned residents didn't attend.
- The budget process appears to start too late (October/November) with only 2–3 months of actuals, leaving a compressed window before the Annual Town Report goes to press in January.
- Front Porch Forum reaches **less than half** of town households — no single channel is sufficient.

Opportunities for Improvement

- Clearer delineation of roles & responsibilities between the Budget Committee and the Select Board would benefit the budget process.
- Draft the budget earlier in the year, avoiding the time compression between November and January.
- **Early public forums:** Host upstream brainstorming events (e.g., "coffee/breakfast" style) before budget details are set — modeled on approaches used by Duxbury and Jericho.
- **Defined engagement milestones:** Communicate (3?) clear public input points in the budget cycle so residents know when their participation matters most.
- **Highlight budget structure:** Color-code or label fixed vs. discretionary line items in published budgets so the public can quickly identify what is actually debatable.
- **Earlier surprise identification:** Budget Committee could ask department heads about major upcoming changes during CIP meetings — passing that intel to the Select Board sooner.
- **Monthly actuals access:** Budget Committee to be CC'd on monthly actuals reports already being distributed.

Action Items

- **Mark (Chair):** Distribute Lessons Learned minutes to the Select Board and discuss at a September SB meeting. At that meeting, ensure enough time is allocated to discuss a multi-year Capital Plan.
- **Budget Committee:** Plan standalone meeting on multi-year CIP development and public engagement strategy.
- **Budget Committee:** Request to be CC'd on monthly actuals reports.