



# Town of Great Barrington Town Manager's Office



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## FY27 Budget Submission Guidance and Expectations

To: All Department Heads

From: Liz Hartsgrove, Town Manager

Date: December 5, 2025

- Attachments:
- ❖ FY27 Budget Action Calendar, dated December 5, 2025
  - ❖ Draft FY27 Budget Policy
  - ❖ FY26-27 Select Board Strategic Priorities Plan
  - ❖ Organizational Commitments

The Town of Great Barrington enters the FY27 budget development process with a continued commitment to fiscal stewardship, service excellence, and community value.

The Financial Policy, soon to be adopted by the Select Board and Finance Committee on December 15<sup>th</sup>, provides a disciplined framework through which we will evaluate needs, allocate resources, and plan strategically for long-term sustainability. It reinforces our shared priorities of maintaining essential services, supporting infrastructure and public facilities, investing in organizational capacity, and keeping the tax levy within statutory and affordability limits. These expectations mirror our organizational mission and staff-developed commitments around professionalism, accountability, respect, communication, consistency, and customer-focused service delivery.

Aligned with these principles, the Select Board's FY26–27 priorities of **Infrastructure & Assets, Public Health & Safety, Housing, Sustainability & Environment, Economic Development, and Municipal Service Delivery** must be clearly visible in every departmental request.

Departments are expected to submit their materials in alignment with milestone deadlines established in the FY27 Budget Action Calendar, including:

REQUIRED TASK	FINAL DATE OF SUBMISSION
Proposed FY27 Position Changes	January 7, 2026
Operating Budgets and Narratives	January 9, 2026
FY27-31 Capital Project Requests	January 15, 2026
Fee Proposals*	January 15, 2026

\*Guidance on Fee Proposal Submissions coming soon.

These steps are critical in allowing adequate time for internal analysis, prioritization discussions, joint budget presentations in February and March, warrant article preparation in March and April, and hearing preparation ahead of Town Meeting.

## BUDGET FORMS & SUBMISSION INSTRUCTIONS

### OPERATING BUDGET

The Town Accountant will issue guidance on the Departmental Operating Budget spreadsheets that will be sent in a separate email next week. Similar to years past, these spreadsheets must be used to detail expenditure requests for the upcoming FY27.

As a starting point, **all FY27 operating budgets are to be initially submitted as level-funded**, with increases permitted only where they reflect existing, documented contractual obligations (e.g., collective bargaining agreements, mandated rate changes, or previously approved commitments).

Departments are reminded not to alter the spreadsheet's structure unless instructed. These forms ensure standardized entry, support our Budget Book development, and create a direct connection between the information departments provide and what is presented to the Select Board, Finance Committee, and the public.

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### BUDGET NARRATIVE SUBMISSION

The Budget Narrative is one of the most important elements of your FY27 submission. It is more than a supporting document; it is the mechanism through which each department demonstrates how operations, resources, and service delivery meaningfully advance the community's priorities from one year to the next. Intended to be the introduction of each department within the budget book, the narrative will help decision-makers and residents understand the value of your work.

A complete Budget Narrative, must be submitted via the online portal form for each department and division:

#### **FY27 OPERATING BUDGET NARRATIVE FORM**

[www.cognitofrms.com/TownOfGreatBarrington/FY27BudgetNarrative](http://www.cognitofrms.com/TownOfGreatBarrington/FY27BudgetNarrative)

The narrative is your opportunity to explain how each department and division's resources translate into service outcomes and advances community priorities. It should:

- Summarize FY26 accomplishments, challenges, and service delivery patterns.
- Identify FY27 objectives and alignment with Select Board strategic priorities.
- Describe key workload drivers, demand changes, or efficiency opportunities.
- Identify risks, regulatory requirements, or emerging needs.
- Present performance indicators for evaluating departmental outcomes.

As this narrative will inform internal review, budget presentations, the published FY27 Budget Book and ultimately Town Meeting Voters, departments are encouraged to treat this exercise as a critical opportunity to communicate their value and stewardship role to the community, and to demonstrate that their work and resource requests contribute to Great Barrington's priorities and mission.

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## **PERSONNEL REQUEST SUBMISSIONS**

Personnel requests play a critical role in shaping service delivery and organizational capacity. Consistent with our financial policy and long-term planning philosophy, staffing proposals must reflect demonstrated need, measurable benefit, and alignment with community priorities rather than routine or incremental growth.

Any proposed addition, reduction, reclassification, or restructuring of positions must be submitted using the online portal form:

### **FY27 PERSONNEL / POSITION CHANGE REQUEST FORM**

[www.cognitofrms.com/TownOfGreatBarrington/FY27PersonnelRequestForm](http://www.cognitofrms.com/TownOfGreatBarrington/FY27PersonnelRequestForm)

This narrative is your opportunity to explain:

- The service gap or operational issue prompting the request such as workload pressures, regulatory requirements, compliance mandates, response expectations, or emerging community needs.
- How the proposed change improves service delivery, customer experience, or organizational capacity whether through efficiency gains, cost avoidance, quality improvement, risk reduction, responsiveness, or innovation.
- Alternatives examined such as reassignment of duties, technology or process redesign, contracted services, seasonal staffing, or training and why those options are insufficient or less cost-effective.
- Operational and financial impacts including salary, benefits, training, equipment, supervision, workspace, onboarding considerations, and long-term cost implications.

## **FUNDING STRATEGY REQUIREMENT**

Departments are responsible for proposing how requested positions will be paid for and sustained over time. This includes identifying:

- Whether the position is to be absorbed within existing appropriations through reallocation or efficiencies;
- Whether the request requires additional funding and, if so, how the department proposes that need be addressed (e.g., fee revenue, reduced spending elsewhere, external reimbursement, grant support, or a phased approach);
- Any offsetting savings or risk mitigation that the position provides;
- Whether the position is temporary, contingent on a grant cycle, intended for startup then transition to local funding, or tied to a mandate.

A position request that does not include a clear, feasible funding strategy will be considered incomplete. Departments should approach personnel planning as a strategic exercise as staffing is the Town's greatest ongoing cost and must be justified through evidence, future planning, and alignment with service outcomes.

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## **FY27-31 CAPITAL REQUEST SUBMISSION**

Capital planning is integral to maintaining the Town's physical assets, service capability, and long-term financial stability. As noted in our Financial Policy, the Town's Capital Improvement Plan (CIP) is not just a list of projects; it is a strategic roadmap for responsibly managing infrastructure, equipment, technology, facilities, and public spaces over time. Departments therefore play a critical role in identifying capital needs, prioritizing investments, and communicating how those investments advance community value.

Capital requests must be submitted using the online portal form:

### **FY27–31 CAPITAL REQUEST FORM**

[www.cognitofrms.com/TownOfGreatBarrington/FY2731CapitalRequestForm](http://www.cognitofrms.com/TownOfGreatBarrington/FY2731CapitalRequestForm)

Each request must include a clear narrative explaining:

- Why the investment is necessary such as deterioration, risk, regulatory requirement, customer service improvements, service delivery capacity, technology modernization, or planned replacement cycle.
- How the project aligns with the Select Board's priorities including infrastructure, public safety, access, sustainability, service delivery, quality of life, or other FY26–27 strategic priorities.
- Consequences of delay or inaction such as operating risk, higher future costs, reduced service capability, safety implications, or failing to meet regulatory expectations.

Following best practices, requests should be framed within a lifecycle stewardship perspective meaning investments are evaluated not just on need today, but ongoing maintenance, timing, and useful life.

To support informed review, **each submission will be required to include:**

- Preliminary or formal cost estimates (with basis of estimate where known)
- Photos, diagrams, assessment reports, vendor quotes, study results, or engineering work as applicable
- Proposed timing (whether FY27 or later within the 5-year window)
- Funding strategy (levy support, grant opportunity, enterprise fund, capital stabilization, or debt exclusion)
- Operating impacts after implementation including staffing, maintenance, utilities, training, efficiencies, or cost avoidance

Departments should view capital planning as a competitive prioritization process. Projects will be evaluated not only on need but also on readiness, strategic alignment, financial feasibility, community impact, and how they contribute to maintaining Great Barrington's infrastructure portfolio over time. *Departmental Peer Review will be held on January 27, 2026 where each Capital Request proposal will be evaluated and rated.*

Requests that are vague, unsupported, or lack documentation will be difficult to evaluate and may not advance for prioritization.

Strong submissions:

- Demonstrate disciplined analysis,
- Provide evidence of organizational due diligence,
- Show how investments contribute to service reliability and long-term asset care,
- Help residents and officials understand the value of capital dollars spent.

Further, Capital requests are reviewed in concert with operating budgets and personnel proposals to create a holistic view of service delivery capacity and long-term affordability. The CIP is not simply a listing of wants; it is a long-range implementation tool that must reflect need, planning maturity, and fiscal responsibility.

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Remember, this process is not about filling out forms. It is about telling the story of how your department delivers value, how resources translate into service outcomes, and how each of us advance the community's priorities. It is also an opportunity to elevate transparency, improve financial planning, strengthen internal collaboration, and demonstrate our shared professionalism.

Thank you for investing the time to develop meaningful submissions, as it is a clear indication and understanding that municipal budgeting is not a technical exercise... it is a reflection of our promise to Great Barrington that the community's resources are being used responsibly to improve and plan for its future.

If assistance is needed in completing materials or interpreting expectations, please reach out to me prior to submission deadlines so I can provide guidance and ensure consistency.

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