

Lunenburg Finance Committee Meeting Minutes
Bilotta Meeting Room
Lunenburg Town Hall
May 28, 2026

Present Members: Chair Chris Menard, Clerk Tom Gray, Committee Member Ana Lockwood, Committee Member Mike Rupp, Committee Member Jean Russell

Absent Members: Committee Member Jay Simeone, Committee Member Tanya Dall

1. Call to Order

The meeting opened at 7:00 PM.

2. Pledge of Allegiance

3. Announcements

There were no announcements.

4. Public Comment

There were no comments from the public.

5. Town Manager & Finance Director Reports

a. FY26 Quarterly Report

Karen Barrett has been out sick and was unable to finalize the quarterly report.

Ana Lockwood requested revenue reports, comparisons to projections, spending-to-actuals data, and updates on capital projects.

Jay Simeone requested general updates from the Finance Department.

6. Current Business

a. Discussion on Town Meeting and Town Election results – recommendations on path forward

Ana Lockwood sent an email to the Select Board and School Committee regarding the troubled balance budget. Additionally, Ana Lockwood is aware that the State Senate has increased revenue aid in various lines by \$465,000. Ana Lockwood suggests the School Committee request more appropriation for their budget in light of the increased revenue aid.

Chris Menard stated that the Finance Committee account was funded at \$180,000 and financial policies at \$50,000. Chris Menard confirms that the town will reconcile any additional state revenue at Special Town Meeting, but the report won't be completed until July.

Jay Simeone watched the Select Board meeting and there was discussion about next steps now that the override failed.

Jean Russell suggests any member who has an alternative budget that they present to the Finance Committee and the Tri-Board and do not wait until Town Meeting.

Chris Menard thanked everyone who contributed over the last year, present at meetings, and gave their opinions.

Dave Rogers, 82 Highland Street, expressed concern about the town's financial issues. He said these problems need to be addressed and that the town needs a clearer understanding of its income, along with more complete information from all sources.

b. Local Receipts Trends

Ana Lockwood states for the last 10 years the town has not collected less than 4 million dollars in local receipts. This year's estimate is 3.535 million. Ana Lockwood suggests not being so conservative based on the data.

Chris Menard suggests having an analyst review all of the town's policies on free cash and estimates.

c. Discuss FY27 Budget process and improvement ideas

Ana Lockwood states the balanced budget needs to be the preliminary budget. Going forward, all documents regarding town finances need to be available to the public and published on the town website.

Majority of the Committee supports continuing the Tri-Board Committee.

Jay Simeone suggests reviewing the free cash policy.

Mike Rupp requests the department heads provide their presentation in an excel format.

7. Old Business

No old business was discussed.

8. Minutes – 3/26, 4/2, 4/6

There was a motion to approve the minutes of March 26, 2026, April 2, 2026, and April 6, 2026, by Ana Lockwood, seconded by Jean Russell. Roll call vote: Jean Russell aye, Mike Rupp aye, Ana Lockwood aye, Tom Gray aye, Chris Menard aye.

Chris Menard will follow up with the Tri-Board meeting minutes.

9. Committee Reports

There were no Committee reports.

10. Actions and Topics for Future Meetings

- Financial Policy Review

Ana Lockwood requested returning to a consistent meeting schedule.

11. Important Dates & Upcoming Meetings

a. Finance Committee – June 11 (tentatively scheduled)

12. Public Comment

Tom Gray stated that the water district elections will take place on June 3rd.

Chris Menard shared that the Town Fair is scheduled for May 31st.

Chris Menard thanked Jean Russell for her time on the Finance Committee.

13. Adjourn

There was a motion to adjourn by Ana Lockwood, seconded by Tom Gray. Roll call vote: Mike Rupp aye, Ana Lockwood aye, Tom Gray aye, Chris Menard aye.

The meeting closed at 7:52 PM.