WATERBURY TOWN MEETING STUDY COMMITTEE

How Peer Towns Handle Special Services Articles

A comparison of 10 Vermont towns + VLCT guidance, and options for discussion to strengthen Waterbury's approach to Handling Special Services Articles

Created and Presented by Committee Members Kathryn Grace and Amy Marshall-Carney (6/24/2026)

Source: "How Surrounding Towns Handle Special Services Articles" (K. Grace & A. Marshall-Carney) and committee orientation materials

Waterbury: who we are

Equity starts with knowing the community. Town-level figures are from the U.S. Census Bureau (QuickFacts / ACS 2020–2024).

21.9% · 19.8%

Age mix

Under 18 · age 65+ (≈58% are working age, 18–64)

7.9%

In poverty

Median household income: $103,917

3.8%

With a disability

Persons under age 65 (type breakdown not published locally)

54.2%

Bachelor's degree +

97.4% are high school graduates or higher (age 25+)

6.8%

Uninsured

Persons under age 65 without health insurance

HUUSD

Public schools

Brookside, Crossett Brook & Harwood Union (Harwood district)

Not measured at the town level: food insecurity (county — Feeding America), adult literacy (county/state — NCES PIAAC), disability by type, and school-enrollment rate. That data gap is itself relevant to defining equity.

QUESTIONS FOR US

- How do we define equity?
- How is it measured?
- How is an appropriation rate determined by the town?

A 2026 Example: Equity or Inequity?

- **According to Waterbury Area Senior Center's website:** ***"We offer daily meals and activities for seniors and their families in Waterbury, Duxbury, Bolton, Moretown and Middlesex." They also provide the space and transportation to prepare and deliver the meals.***

- **The Vt. Demographic website defines seniors as 60+ years of age. (As of the last census, 23% of Vermont's population is over 65 years of age.)**

Town	* Seniors aged 60+ in each community	% of Total Seniors served by WASC	WASC's 2026 request from each town	% of total amt. requested/town from WASC total town contributions	Difference between % of Seniors/town and % requested via town budget or warning	Estimated Change in donation based on % of Seniors/town
Bolton	220	7.47 %	$1000	1.80%	- 5.67 %	+ $ 3,144
Duxbury	288	9.78 %	$2,750	4.96%	- 4.82 %	+ $ 2,672
Middlesex	582	19.76 %	$7500	13.53 %	- 6.23 %	+ $ 3,454
Moretown	434	14.73 %	$6250	11.27%	- 3.46 %	+ $ 1,918
Waterbury	1422	48.27%	$37,944 (budget + sp. articles)	68.44%	+ 20.17%	- $ 11,183
Total:	**2946**	100.01%	**$55,444**	100%		

Why this matters

The question

Each year nonprofits and service agencies ask the town to appropriate tax dollars at Town Meeting. How those requests get onto the warning — and how voters decide — shapes both participation and fairness.

The legal floor

Vermont law (24 V.S.A. § 2691; 17 V.S.A. § 2642) lets towns fund social services and requires any article petitioned by 5% of voters be warned. Beyond that, each town sets its own process.

The opportunity

Most peer towns have built a structured intake process. Waterbury has not — which is both a gap and a chance to improve clarity, equity, and voter information.

What peer towns do

Town	Actual Town Population	Application required?	Deadline / timing	How requests are handled
Montpelier	**8,014**	**Yes**	~Apr 15	Community Fund board vets requests, recommends to Council
Morristown	**5,722**	**Yes**	—	Application via town website
Waterbury	**5,405**	No	**— (47-day petition)**	**Statute + informal <$2,000 practice; no written policy**
Stowe	**5,285**	**Yes**	Nov 15	Form + board review; caps & % guidelines; no special article w/o petition
Richmond	**4,159**	**Yes**	~Early Oct	Discretionary Funding Policy; EIN & nonprofit status required
Underhill	**3,141**	Letter of request	120 days	Letter to board; petition required if new/larger by >$250
Waitsfield	**1,918**	**Yes**	Nov 30	Formal application folded into budget; voters decide at meeting
Warren	**1,585**	No	—	No unified policy; case-by-case by Selectboard
Duxbury	**1,548**	No (questionnaire)	Nov 1	Board reviews, asks residents served; selects what to include
Moretown	**1,542**	No (phone)	—	Petition only if >$5,000; annual W-9; refile if amount changes

7 of 10 peer towns use a formal application or letter-of-request process with a fall deadline. Waterbury and Warren rely on statute + discretion.

Of the 5 highest populated surrounding towns, Waterbury is the only one without a written, formal policy or an applic

Social Services Expenditures by Surveyed Towns - *To Warn or Not to Warn*						
Town Surveyed	**# of non-profit articles warned**	**# Local non profits served**	**Amt. Included as budget line items**	**Amt. Warned**	**Total nonprofit expenditures**	**Process**
Montpelier POP: 8014	1	32	$ 138,175	0	$138,175	Detailed Application to Community Fund. One article for total for the Community Fund.
Stowe POP: 5,285	0	19	$100,808	0	$ 108,808	Form + board review; caps & % guidelines; no special article w/o petition
Waterbury POP: 5,405	15 (grouped)	25	A: $36,125 + B $96,650 (RW) Total: $ 132,775	C: $59,357	A+C = $95,482 A+B+C=$192,132* *includes RW	**Statute + informal <$2,000 practice; no written policy**
Morristown POP 5,722	21	21	$ 83,969	$ 83,969	$ 83,969	Petition only if >$5,000; annual W-9; refile if amount changes
Warren POP: 1,585	1	26	$ 46,858	$ 25,000	$71,858	**No unified policy;** case-by-case by Selectboard
Waitsfield POP 1,918	3	29	$30,220	$ 20,150	$ 50,370	Formal application folded into budget; voters decide at meeting
Richmond POP 4,159	9	18	$19, 375	$ 21,760	$ 41,135	Discretionary Funding Policy; EIN & nonprofit status required
Moretown POP: 1,542	7 (grouped)	22	$ 23,485	$ 8500	$ 31,985	Petition only if >$5,000; annual W-9; refile if amount changes
Duxbury POP 1,548	0	21	$12,592	0	$ 12,592	Board reviews, asks residents served; selects what to include
Underhill POP: 3,141	1	11	$ 10,650	$1,000	$11,650	Letter to board; petition required if new/larger by >$250

Three models emerge

1 Application + review body

Formal form, fixed deadline, evaluation criteria; a fund or committee vets requests and recommends to voters.

EXAMPLES

Montpelier · Stowe · Waitsfield · Richmond · Morristown

2 Light intake + board discretion

A questionnaire or letter of request; the Selectboard reviews and decides what to include in the budget.

EXAMPLES

Duxbury · Moretown · Underhill

3 Statute / case-by-case

No local policy beyond state law; requests handled ad hoc or via the 5% petition route.

EXAMPLES

Warren · Waterbury (current)

Waterbury today

Our current structure rests almost entirely on state statute and informal Selectboard practice — there is no written local policy.

No formal policy

Neither the current board, past members, nor long-time manager Bill Shepeluk is aware of any written policy for outside funding requests.

Statute only

The town follows 17 V.S.A. § 2642(a)(3): any article petitioned by 5% of voters (≈230 people in 2026) must be warned.

Informal $2,000 practice

By custom, groups requesting under $2,000 and not increasing the amount are added to the warning on request — no refiling.

Selectboard discretion

The board may add any article on its own initiative and decides line-item inclusion as part of general budgeting.

No application or proof

No standard form, deadline, residents-served data, or proof of nonprofit status is required.

No distinction by type

Statute doesn't distinguish local/state, public/private, or even for-profit — any valid petition must be included.

Where Waterbury has gaps

Relies on institutional memory	With no written policy, consistency depends on individuals (e.g., the former manager). Knowledge can walk out the door.
Uncodified $2,000 threshold	The informal cutoff isn't written down, so it can be applied unevenly and is hard for groups to plan around.
No standard information for voters	No form means no consistent data on residents served, purpose, or nonprofit status — voters decide ad hoc with little info.
No clear on-ramp for new groups	Without a deadline or application, new or smaller organizations may not know how or when to ask.

Options for discussion: effort vs. impact

Green = quick wins · Gold = higher-effort, high-payoff · Detail on next slide

Prioritized options for discussion

Option	What it would do	Effort	Impact	Peer model
Adopt a short written policy	Codify the informal practice (threshold, recurring requests, board role) in one page	**Low**	**High**	*VLCT model*
Standard application form	Collect amount, purpose, residents served, nonprofit ID for every request	**Low**	**High**	*Stowe / Montpelier*
Annual fall deadline	Set a submission date (e.g., Nov 1) so requests align with the budget	**Low**	**Med-High**	*Waitsfield / Stowe*
Evaluation criteria + caps	Define how requests are judged; optional % or 20% growth guideline	**Medium**	**High**	*Stowe*
Annual refile + proof	Require updated W-9 / 501(c)(3) and refile if amount increases	**Medium**	**Medium**	*Moretown / Richmond*
Community fund / committee	A review body vets requests and gives voters one recommended slate	**High**	**High**	*Montpelier (MCF)/Stowe*

Questions for the committee

- Do we want a written policy at all — and if so, how prescriptive?
- Should requests run through the Selectboard, a new committee, or a community fund?
- What threshold and deadline make sense for Waterbury?
- Should recurring requests refile annually, or only when the amount changes?
- At Town Meeting, one consolidated article or individual votes per group?
- How do we balance structure with keeping the process open and low-barrier?

Next: agree on direction → draft policy language → public input → initial recommendations to Select Board (Oct 2026)