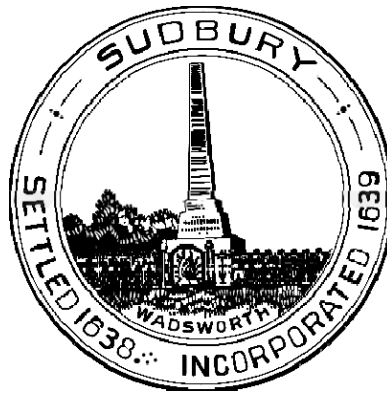


Town of Sudbury Massachusetts



OFFICIAL WARRANT

ANNUAL TOWN MEETING

SATURDAY, MAY 22, 2021, 12:30 p.m.

RAIN DATE/CONTINUATION DATES, IF NEEDED

SUNDAY, MAY 23, 2021 – 12:30 p.m.

SATURDAY, JUNE 12, 2021 – 12:30 p.m.

SUNDAY, JUNE 13, 2021 – 12:30 p.m.

Lincoln-Sudbury Regional High School (Outdoors)
390 Lincoln Road, Sudbury, MA



BRING THIS BOOK WITH YOU

FOR ADDITIONAL ARTICLE INFORMATION

Go to the Town's website at

<https://sudbury.ma.us/townmeeting/2021atm>

and after accessing, click on the [Link](#) for the specific article.

**TOWN OF SUDBURY
2021 ANNUAL TOWN MEETING WARRANT**

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**ACCESS TO LINCOLN-SUDBURY REGIONAL HIGH SCHOOL ANNUAL TOWN
MEETING OUTDOOR SEATING AND CHECK-IN
WITH PROVISIONS FOR PARTICULAR ACCOMMODATIONS**

Note: Please check the Town of Sudbury website for changes or additional information.

ANNUAL TOWN MEETING FIELD SITE: Baseball diamond in the lower athletic field adjacent to the gymnasium building at the rear of the school which is accessible by walking or by golf carts with drivers. Seating for persons requiring particular accommodations will be available in the area adjacent to the gymnasium building overlooking the field with full visual and hearing access to the meeting.

Portable restrooms and sanitizing stations will be available.

All seating will be spaced appropriately in accordance with COVID-19 regulations and appropriate face coverings must be worn by all attendees.

Stationary microphone access will be available and appropriate cleaning will take place.

PARKING: The primary parking will be located in the main parking lot (the “solar field parking lot”) to the right (east) of the schools. A specified area elsewhere will be reserved for handicapped person parking where golf carts with drivers or other transport can provide transportation to the check-in area.

CHECK-IN: The check-in voter registration area will be located at the rear of the gymnasium building adjacent to the lower field.

SUMMARY OF BASIC TOWN MEETING PROCEDURES

General Rules of Debate and Voting

1. Only registered voters, non-resident appointed or elected representatives of the Town, and Town employees may speak without consent of Town Meeting. The Moderator will not vote, even in the case of where the Moderator's vote would break or create a tie.
2. The proponents of an article make the first motion under the article. A voter must then second the motion. The proponents then make a presentation in support of the motion. The Moderator then recognizes the Select Board and Finance Committee for reports, followed by any other boards that are required to report on the article. After the Town boards have spoken, Town Meeting proceeds to general debate on the matter and a vote.
3. Please raise your hand when you wish to speak. After being recognized by the Moderator, please go to the nearest microphone and keep your mask on when you speak. The record of Town Meeting is made on audiotape and your remarks will not be recorded if you do not speak into a microphone. Each and every time you speak, please stand (if you are able) and begin by giving your name and address for the record.
4. Until everyone who wishes to be heard has spoken, no one may speak more than twice on a matter except to correct an error or answer a question. The initial presentation by the proponent(s) of an article is limited to ten minutes, and all other comments are limited to five minutes, unless a majority of those present and voting give consent.
5. All votes are by majority unless otherwise announced. Votes will first be taken by a show of hands while voters are seated. If the Moderator is in doubt, then a standing vote will be taken. If the Moderator is still in doubt, then tellers will count the votes. If a voter disagrees with the Moderator's call of a sitting or standing vote, the voter may challenge the call by immediately standing and saying loudly, "I challenge the vote!" If six additional voters support the challenge, the vote will be counted.

The Budget

1. A motion is first made by the Finance Committee proposing a budget that is limited to the amount required to finance the Finance Committee's budget proposal. This limiting motion only seeks a declaration from Town Meeting as to the overall limit on the budget. A vote in favor of the motion does not mean that Town Meeting has voted for the particular distribution of the total amount as set forth in the Warrant.
2. After voting on the limiting motion, Town Meeting will address the budget as follows:
 1. The Moderator will read the budgets in numerical order by title. For example, the Moderator will say "200 Public Safety, does anyone have a motion to amend or a question involving 200 Public Safety?" If you have a motion to amend or a question, please raise your hand.

2. If you have a motion to amend, it should be in one of two forms:
 - a. For example, "I move to increase 200 Public Safety to the sum of \$X and to reduce 600 Culture and Recreation to the sum of \$Y." X cannot be greater than Y.
 - b. For example, "I move to reduce 200 Public Safety to the sum of \$Z."

A motion simply to increase a line item, without a corresponding reduction in another line item, will not be accepted because the preceding vote on the limiting motion will have capped the total amount of allowable appropriation.

3. Town Meeting will debate and vote on any motion to amend.
4. Town Meeting will arrive at the end of this process with a main motion on the budget as it may be amended, and then vote on it.

Consent Calendar

1. In order to expedite Town Meeting and save valuable time for discussion of key issues, Sudbury utilizes a "Consent Calendar" to speed passage of articles that appear to raise no controversy. The purpose of the Consent Calendar is to allow the motions under these articles to be acted on as one unit and to be passed by a vote without debate. The Consent Calendar will be taken up as the first order of business at the beginning of Town Meeting.
2. Until the 2020 Annual Town Meeting, town tradition had been that a single voter could ask that an article be held from the Consent Calendar and it would be done. In light of evolving COVID-19 circumstances, and a wish for greater efficiency at town meetings in general, the Moderator will now require that a majority of Town Meeting vote in favor of holding any article that a voter wishes to remove from the Consent Calendar.
3. After calling out each individual article in the Consent Calendar, the Moderator will ask that all articles not removed from the Consent Calendar be passed as a unit. The quantum of vote required to pass the Consent Calendar will be the strictest quantum of vote required for any individual article on it.
4. Please review the list of articles and motions proposed for the Consent Calendar that follow. Complete reports are to be found under each article printed in this Warrant. If you have questions about the articles, motions or procedure, please feel free to call the Town Manager at 978-639-3381 before Town Meeting.

CONSENT CALENDAR ARTICLES AND MOTIONS

ARTICLE 10. CHAPER 90 HIGHWAY FUNDING: Move in the words of the article.
(See article at page 7.)

ARTICLE 11. FY22 STABILIZATION FUND: Move in the words of the article with the sum of \$281,268 to be transferred from Free Cash. (See article at page 8.)

ARTICLE 12. FY22 REVOLVING FUND SPENDING LIMITS: Move in the words of the article.
(See article at page 9.)

ARTICLE 17. MARLBORO ROAD CULVERT REPLACEMENT: Move in the words of the article with the sum of \$400,000 to be transferred from Free Cash. (See article at page 11.)

ARTICLE 18. FRONT END LOADER WITH PLOW: Move in the words of the article with the sum of \$230,000 to be transferred from Free Cash. (See article at page 12.)

ARTICLE 19. MULTI-PURPOSE SIDEWALK TRACTOR: Move in the words of the article with the sum of \$205,000 to be transferred from Free Cash. (See article at page 12.)

ARTICLE 20. 6-WHEEL COMBO BODY DUMP TRUCK W/PLOW & WING: Move in the words of the article with the sum of \$285,000 to be transferred from Free Cash. (See article at page 13.)

ARTICLE 22. MEANS TESTED SENIOR TAX EXEMPTION EXTENSION: Move in the words of the article. (See article at page 15.)

ARTICLE 29. COMMUNITY PRESERVATION FUND –DR. BILL ADELSON PLAYGROUND IMPROVEMENTS: Move in the words of the article. (See article at page 31.)

ARTICLE 30. COMMUNITY PRESERVATION FUND –FRANK FEELEY FIELDS IMPROVEMENT: Move in the words of the article. (See article at page 31.)

ARTICLE 31. COMMUNITY PRESERVATION FUND – HISTORIC PRESERVATION PLAN: Move in the words of the article. (See article at page 33.)

ARTICLE 32 COMMUNITY PRESERVATION FUND – HOUSING PRODUCTION PLAN: Move in the words of the article. (See article at page 33.)

ARTICLE 33. COMMUNITY PRESERVATION FUND – HOUSING TRUST ALLOCATION: Move in the words of the article. (See article at page 34.)

ARTICLE 34. COMMUNITY PRESERVATION FUND – REGIONAL HOUSING SERVICES OFFICE (RHSO) MEMBERSHIP FEE: Move in the words of the article. (See article at page 35.)

ARTICLE 35. COMMUNITY PRESERVATION FUND – REVERSION OF FUNDS: Move in the words of the article. (See article at page 36.)

ARTICLE 36. COMMUNITY PRESERVATION FUND – GENERAL BUDGET AND APPROPRIATIONS: Move to appropriate the sums recommended by the CPC in the following Community Preservation budget for FY2022 Community Preservation surtaxes:

\$ 85,000 Administrative and Operating Cost

\$ 1,093,035 Debt Service

(See article at page 37.)

Motions and Amendments

1. The purpose of an article in the Warrant is to inform the voters of what may come before the meeting and the outside scope of what may be considered. Every matter that is voted on at Town Meeting must come in the form of a motion. It is a motion that puts an article before Town Meeting, and it is the motion, *not the article*, that is actually voted on. Therefore, while speakers may refer to passing, defeating, or otherwise dealing with “the article,” what Town Meeting actually debates and votes on are motions, not articles.
2. A speaker may question whether a certain motion is “within the four corners of the article.” Such a challenge requires the Moderator to determine whether the motion is within a reasonable reading of the article as printed in the Warrant, and therefore should be allowed, or ruled out of order as being beyond the legitimate subject matter of the article.
3. Often, the first or “main” motion under an article will be to “move in the words of the article.” By making this motion, the speaker is adopting the article as his or her motion thereunder. This can only be done if the language of the article is drafted in such a way that it is appropriate for simple adoption as a motion. Whenever the presenter’s motion differs from the wording in the Warrant, the presenter must point out and explain those differences to Town Meeting.
4. All substantive motions, including all main motions and motions to amend a main motion, must be provided to the Moderator, the Town Clerk, and the Technology Administrator in writing before they are made. Please see the guidelines for electronic presentation on the Town website: www.sudbury.ma.us.
5. If you have an amendment, you should e-mail it to the Technology Administrator at infosystems@sudbury.ma.us, with a copy to the Moderator at moderator@sudbury.ma.us, and the Town Clerk at clerk@sudbury.ma.us. Advance notice to the Technology Administrator, Moderator and Clerk enhances time efficiency at Town Meeting, and the Moderator may be able to suggest language that is both acceptable to you and within the four corners of the article and therefore permissible to proceed to debate and vote. It is also recommended that you discuss your amendment with the presenter of the article as you may be able to convince him or her to include it as part of the main motion and thus avoid having to vote separately on the amendment. The Moderator may reject proposed amendments that fail to adhere to these guidelines.

Dismissing Articles, Indefinite Postponement and Withdrawing Motions

1. It is possible for Town Meeting to decide to take no action on an article. This decision is usually made because new or additional information has come to light after the preparation of the warrant indicating that action on the article is unnecessary, unwise or illegal. In such instances, frequently there will be a motion “to indefinitely postpone” an article. This motion, if adopted, kills the article for all intents and purposes for the Town Meeting. The motion is frequently used when proponents of an article have decided not to proceed with it but want an opportunity to explain to the meeting why they are, in effect, abandoning the article at this time. The motion also may be used by someone who wishes to defeat an article before it can be fully debated on the merits. In such cases, it is important to understand that indefinite postponement can have the same effect as defeat which, in turn, can have significance with respect to some items, notably zoning matters, as to when the matter can again be considered by the Town.
2. If you have made a motion or an amendment, you can move to “withdraw the motion” if you have second thoughts or new information. A motion to withdraw can be made any time during the debate of the motion but cannot be made after the motion has been voted on.

Limits on Debate

1. There is no prescribed limit to debate except common sense. The Moderator can limit debate and can ask speakers to stop if they are straying from the subject, repeating points already made or talking at unnecessary length.
2. Town Meeting itself can also terminate debate. To do so, after being recognized by the Moderator, you may say, “I move the previous question.” This motion is not debatable, and if seconded and voted by a two-thirds majority, debate ends and the motion under discussion will be then put to a vote.
3. The Moderator may defer motions to limit debate when, in his or her reasonable judgment, there are a significant number of voters who have indicated a desire to speak but have not yet been recognized.

Points of Order

1. Once recognized by the Moderator, no speaker may be interrupted in any way except by a “point of order.” A point of order is not a motion, and does not require a second or a vote. It is a question, and on a point of order a voter may raise only three valid concerns:
 - a. Is the speaker entitled to the floor? For example, is the person a non-voter, or spoken for longer than his allotted time?
 - b. Is the speaker saying something inappropriate, frivolous, irrelevant, or illegal?
 - c. Is there some error in the procedure of the pending action or motion?
2. The Moderator welcomes proper points of order and will make every effort to explain the procedural issues that shape Town Meeting discussions. When exercising this parliamentary privilege, you should stand and state loudly that you wish to make a point of order, and wait for the Moderator to recognize

you. No voter should hesitate to rise and bring to the Moderator's attention an issue that constitutes a proper point of order because, when exercised responsibly, it functions as a tactful hint from a voter regarding important points of procedure that the Moderator may have missed.

Motions for Reconsideration

1. Article II, Section 13 of our Bylaw controls. A motion to reconsider an article previously voted on in the same session (i.e. the same night), is proper, and an affirmative vote of 2/3 of the voters present is required for passage. If Town Meeting has adjourned for the evening, a motion to reconsider an article voted on in a previous session requires a unanimous vote, unless written notice of an intention to move for reconsideration, signed by 15 voters, is given to the Town Clerk by noon of the next weekday, in which case, a 2/3 vote would be required to pass a motion to reconsider.
2. In the event a motion to reconsider is properly made and seconded, all discussion must be confined exclusively to the merits or demerits of reconsideration. In general, the only proper reasons to seek reconsideration are that there occurred such a misstatement of fact or law in the preceding debate, or such an error of procedure, that the voters, if aware of such discrepancies, would have voted differently. It is not a proper basis for reconsideration to argue simply that the voters arrived at the wrong result.

Adjournment

1. Adjournment of any evening session will occur on completion of the article under discussion at 10:30 P.M., unless there is a two-thirds vote to do otherwise. The Moderator will ask for a motion to adjourn the Town Meeting to another time to complete the Warrant. A voter can also make a motion to adjourn. The time and place for resuming Town Meeting must be specified in the motion.
2. When all business on the Warrant has been acted on, the Moderator will ask for a motion to dissolve the meeting, which must be seconded and put to a vote.

Decorum

We gather at Town Meeting as friends and neighbors, united by a shared commitment to the civic life and governance of Sudbury. The town meeting form of government is unique to New England, and its continued existence links us directly to the founding of Sudbury more than 375 years ago. It is democracy in its finest and purest form, and its value lies in townspeople being forced to have discussions and make decisions together, face to face, in real time. Its proper functioning requires that every speaker be treated with courtesy and respect, no matter how strongly one may disagree with his or her point of view. To that end, the Moderator will not allow any clapping, hissing, booing or other audible noise, for or against any speakers, either before, during or after presentations. The Moderator has the power to terminate the right to speak of anyone who makes disrespectful comments, whether directed at a voter, speaker or Town official.

PART I

**TOWN OF SUDBURY ANNUAL
TOWN MEETING WARRANT**



Commonwealth of Massachusetts Middlesex, ss.

To the Constable of the Town of Sudbury:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify and warn the inhabitants of the Town of Sudbury, qualified to vote in Town affairs to meet at the Lincoln-Sudbury Regional High School Field, 390 Lincoln Road, in said Town on Saturday, May 22, 2021, at 12:30 p.m., then and there to act on the following articles:

ARTICLE 1. HEAR REPORTS

To see if the Town will vote to hear, consider and accept the reports of the Town Boards, Commissions, Officers and Committees as printed in the 2020 Town Report or as otherwise presented; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD POSITION: The Select Board supports this article.

ARTICLE 2. FY21 BUDGET ADJUSTMENTS

To see if the Town will vote to amend the votes taken under Article 3, FY21 Budget, of the 2020 Annual Town Meeting, by adding to or deleting from line items thereunder, by transfer between or among accounts or by transfer from available funds; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD REPORT: This article will allow flexibility to review all accounts within the FY21 Operating Budget to make adjustments at the Annual Town Meeting as necessary.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE POSITION: The Finance Committee will report at Town Meeting.

ARTICLE 3. FY22 BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, for any or all Town expenses and purposes, including debt and interest, and to provide for a Reserve Fund, all for the Fiscal Year July 1, 2021 through June 30, 2022, inclusive, in accordance with the following schedule, which is incorporated herein by reference:

EXPENDITURES	FY22 Recommended
300: Education - Sudbury Public Schools (SPS)	40,630,742
300: Education - LS Regional High School (LS) ¹	27,330,369
300: Education - Vocational	565,400
Total: Schools	68,526,511
100: General Government	3,249,463
200: Public Safety ⁴	9,392,898
400: Public Works	5,699,232
500: Human Services	975,948
600: Culture & Recreation	1,504,394
800: Town-Wide Operating and Transfers	480,969
Total: Town Departments	21,302,904
700: Town Debt Service	2,433,239
900: Employee Benefits (Town and SPS) ²	14,206,150
1000: OPEB Trust Contribution (Town and SPS) ³	625,000
TOTAL OPERATING BUDGET:	107,093,804

(not including Capital or Enterprise Funds)

¹ Includes \$218,944 for OPEB and \$510,074 for Debt Service.

² Includes \$6,217,673 for Town and \$7,988,477 for SPS.

³ Includes \$201,410 for Town and \$423,590 for SPS.

⁴ Appropriation is partially funded by \$660,000 of ambulance receipts.

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

SEE DETAILED BUDGET INFORMATION IN THE FINANCE SECTION OF THE WARRANT.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE POSITION: The Finance Committee recommends approval of the FY22 Budget.

ARTICLE 4. FY22 CAPITAL BUDGET

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, or authorize lease purchase agreements of up to five years, for the purchase or acquisition of capital items including but not limited to capital equipment, construction, engineering, design, renovation to buildings, equipping of vehicles, and all incidental and related expenses for projects:

	FY22
	<u>Recommended</u>
Operating Capital Budget	
Sudbury Public Schools	253,000
LS Regional High School	114,727
Information Systems	50,000
Police	30,000
Fire	256,000
Public Works	215,000
Combined Facilities	183,453
Total Operating Capital Budget	<u><u>1,102,180</u></u>

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed budget information, including details on each of these items in the Finance Section of the Warrant.

SELECT BOARD REPORT: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the FY22 Capital Budget.

ARTICLE 5. FY22 TRANSFER STATION ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or transfer from available funds, the following sums, or any other sum or sums, set forth in the FY22 budget of the Transfer Station Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

	FY20	FY21	FY22
	Actual	Appropriated	Recommended
TRANSFER STATION ENTERPRISE FUND			
Direct Costs	276,294	297,764	291,303
Indirect Costs ¹	17,214	17,163	17,800
Total Expenditures	293,508	314,927	309,103
Enterprise Receipts	248,340	314,927	309,103
Total Revenues	248,340	314,927	309,103

¹ Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 6. FY22 POOL ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or transfer from available funds, the following sums, or any other sum or sums, set forth in the FY22 budget of the Atkinson Pool Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

	FY20 Actual	FY21 Appropriated	FY22 Recommended
POOL ENTERPRISE FUND			
Direct Costs	359,155	427,421	438,753
Indirect Costs ¹	18,956	36,828	25,383
Total Expenditures	378,111	464,249	464,136
Enterprise Receipts	303,046	464,249	464,136
Total Revenues	303,046	464,249	464,136

¹ Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager. (Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 7. FY22 RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET

To see if the Town will vote to raise and appropriate, or transfer from available funds, the following sums, or any other sum or sums, set forth in the FY22 budget of the Recreation Field Maintenance Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

	FY20 Actual	FY21 Appropriated	FY22 Recommended
FIELD MAINTENANCE ENTERPRISE FUND			
Direct Costs ¹	123,863	230,435	205,403
Indirect Costs ²	23,198	24,269	25,383
Total Expenditures	147,061	254,704	230,786
Enterprise Receipts	86,539	254,704	230,786
Total Revenues	86,539	254,704	230,786

¹ Direct costs include \$10,500 of capital expenditures.

² Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 8. SNOW AND ICE TRANSFER

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums of money, to be expended under the direction of the Town Manager, for the purpose of funding the Fiscal Year 21 Snow and Ice deficit; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: Due to the nature of this year's winter, the Town was required to deficit spend in the DPW snow and ice accounts. This article will fund that deficit.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 9. UNPAID BILLS

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums of money for the payment of certain unpaid bills incurred in previous fiscal years which may be legally unenforceable due to the insufficiency of the appropriation in the years in which such bills were incurred; or act on anything relative thereto.

Submitted by the Town Accountant.

(Four-fifths vote required)

TOWN ACCOUNTANT REPORT: Invoices that are submitted for payment after the accounts are closed at the end of a fiscal year or payables for which there are insufficient funds (and were not submitted for a Reserve Fund Transfer) can only be paid by a vote of the Town Meeting, a Special Act of the Legislature, or a court judgment.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING

(Consent Calendar)

To see if the Town will vote to authorize the Town Manager to accept and to enter into a contract for the expenditure of any funds allotted or to be allotted by the Commonwealth for the construction, reconstruction and maintenance projects of Town ways pursuant to Chapter 90 funding; and to authorize the Treasurer to borrow such amounts in anticipation of reimbursement by the Commonwealth; or act on anything relative thereto.

Submitted by the Director of Public Works.

(Majority vote required)

DIRECTOR OF PUBLIC WORKS REPORT: Each year the Legislature allocates funds to cities and towns for the improvement of their infrastructure, to be expended under the Chapter 90 guidelines. The current plans are to continue the implementation of our pavement management program.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 11. FY22 STABILIZATION FUND

(Consent Calendar)

To see if the Town will vote to transfer from Free Cash the sum of \$281,268, or any other sum or sums, to be added to the Stabilization Fund established under Article 12, of the October 7, 1982 Special Town Meeting, pursuant to General Laws Chapter 40, Section 5B; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD REPORT: Based on the Select Board’s Budget and Financial Policies, the Town’s goal is to maintain in the Stabilization Fund an amount equal to 5% of the total projected general fund operating revenues for the last fiscal year. This Fund protects the Town in case of a severe emergency and is beneficial in supporting the Town’s AAA bond ratings, which in turn results in lowering borrowing costs.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 12. FY22 REVOLVING FUND SPENDING LIMITS (Consent Calendar)

To see if the Town will vote to establish the FY22 spending limits for the use of revolving funds under M.G.L. c.44, s.53E ½, by the following departments of the Town, in accordance with each fund as set forth in Article XXXIII of the Town of Sudbury General Bylaws:

<u>Fund</u>	<u>Department</u>	<u>Maximum Amount</u>
Public Health Vaccinations & Tobacco Control	Board of Health	40,000
Plumbing & Gas Inspectional Services	Building Inspector	65,000
Portable Sign Administration & Inspectional Services	Building Inspector	10,000
Conservation (Trail Maintenance)	Conservation Commission	15,000
Conservation (Wetlands)	Conservation Commission	50,000
Forestry Activities	Conservation Commission	10,000
Council on Aging Activities	Council on Aging	65,000
Council on Aging Van Transportation (MWRTA)	Council on Aging	175,000
Cemetery Revolving Fund	Public Works	20,000
Fire Department Permits	Fire	50,000
Goodnow Library Meeting Rooms	Goodnow Library	10,500
Goodnow Library Services	Goodnow Library	6,000
Recreation Programs	Park and Recreation Commission	650,000
Teen Center	Park and Recreation Commission	10,000
Youth Programs	Park and Recreation Commission	200,000
Bus	Sudbury Public Schools	450,000
Instrumental Music	Sudbury Public Schools	100,000
Cable Television	Town Manager	30,000
Rental Property	Town Manager	40,000
Dog	Town Clerk	75,000
Zoning Board of Appeals	Zoning Board of Appeals	35,000
Solar Energy	Combined Facilities	450,000

; or act on anything relative thereto.

Submitted by the Town Finance Director.

(Majority vote required)

FINANCE DIRECTOR REPORT: As set forth in Article XXXIII of the Town of Sudbury General Bylaws, this article seeks authorization for Fiscal Year 2022 for revolving funds previously established pursuant to M.G.L. c.44, s.53E1/2. Expenditures from each revolving fund are subject to the limitation established annually by Town Meeting or any increase therein as may be authorized in accordance with G.L. c.44, §53E½.

The maximum amount stated is the same as the FY21 maximum voted for each revolving fund except for the following: Board of Health Public Health Vaccinations & Tobacco Control increased from \$30,000 to \$40,000; and the Council on Aging Van Transportation (MWRTA) increased from \$150,000 to \$175,000.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 13. WITHDRAWN

ARTICLE 14. FUND LITIGATION COSTS – EVERSOURCE

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums of money to be expended under the direction of the Town Manager, for the purpose of legal fees, hiring of experts, and all costs incidental and related to litigation of the Eversource/Hudson reliability project; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: This article will allow the Town to transfer funds to be used to fund the costs of continuing litigation with Eversource. Litigation is ongoing at both the Energy Facility Siting Board and in the Supreme Judicial Court. The proposed project will run a 115kV power transmission line from Sudbury to Hudson. These funds will allow the Town to continue the litigation and any necessary appeals to decisions.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 15. WITHDRAWN

**ARTICLE 16. CONSTRUCTION OF HOUSING/LIVING ADDITION –
FIRE STATION NO. 2**

To see if the Town will vote to raise and appropriate, appropriate from available funds, or borrow, a sum or sums of money, to be expended under the direction of the Town Manager, for the purpose of constructing a new housing/living/office area adjacent to and connected to the existing Fire Station #2 Building, located at 550 Boston Post Road, with the Permanent Building Committee tasked with

oversight of professional, engineering, architectural, and project management services, preparation of plans, specifications, bid documents, supervision of work and including the purchase of additional equipment, technology, furniture, landscaping, and acquisition by gift, purchase, eminent domain, or otherwise such temporary and/or permanent access, utility, and/or other easements as may be necessary, and all incidental and related expenses; and to determine whether the vote taken hereunder shall be expressly contingent upon approval by the voters at an election to exclude from the levy limit the amounts needed to repay principal and interest on the borrowing outside of the provisions of Proposition 2 ½, so called, often referred to as a “debt exclusion” in accordance with General Laws Chapter 59, Section 21C; or act on anything relative thereto.

Submitted by the Fire Chief.

(Two-thirds vote required, if borrowed)

FIRE CHIEF REPORT: The Fire Department is seeking to add a housing, living, office and public space addition to be attached to the current Fire Station #2. The goal of this program is to provide living areas to support four fire personnel, this will allow for the staffing of a Fire Engine Company and an Advanced Life Support Ambulance (ALS) to provide for faster response to emergencies in the southern part of Sudbury.

In the past six years the development of the properties located on the Rt. 20 corridor have been brisk, the construction of Coolidge I and II have provided more than 100 additional age restricted housing units in the most southern section of Rt. 20. The redevelopment by National Development has added 250 non-aged restricted housing, a memory care health facility containing 48 units, an additional 57 units of age-restricted housing units in the Pulte housing units and additional retail commercial space. This one development added 214 emergency responses in 2020.

In the 2020 calendar year the southern section has contributed to 33% more emergency responses than both the North and West sections of the town combined. Providing additional housing at Fire Station 2 will reduce the response time to provide advanced patient care and enhance fire operations.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 17. MARLBORO ROAD CULVERT REPLACEMENT

(Consent Calendar)

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$400,000, or any other sum or sums, to be expended under the direction of the Department of Public Works Director for the purpose of replacing the culvert at 270 Marlboro Road and to stabilize the roadway and shoulder, along with any incidental and related costs; and to authorize the Select Board to acquire, by purchase, gift, eminent domain or otherwise, permanent and temporary easements needed to carry out the vote taken hereunder; or act on anything relative thereto.

Submitted by the Public Works Director.

(Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to reconstruct the culvert near 270 Marlboro Road. Heavy rainfall events in the spring of 2019 caused portions of the shoulder along Marlboro Road to erode. The shoulder was temporarily stabilized by the DPW with the installation of gabions on the downstream side of the culvert to mitigate any further erosion while protecting the roadway and associated utilities (water, gas and telecommunications).

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 18. FRONT END LOADER WITH PLOW *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$230,000, or any other sum or sums, for the purchase or acquisition and equipping of a new vehicle for the Department of Public Works, including all incidental and related expenses; or act on anything relative thereto.

Submitted by the Public Works Director. (Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to purchase a new Front End Loader with plow to replace an older model. The Department currently uses four (4) Front End Loaders, however the oldest one is over 16 years old and is beyond its useful life expectancy as a front-line machine. This article requests funds to purchase a new machine, which will be safe, reliable, efficient, and capable of meeting the needs of the department. This equipment will make the plowing operations more efficient, and ultimately provide the staff with the proper equipment to clear the roads and parking lots during the snow and ice season.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 19. MULTI-PURPOSE SIDEWALK TRACTOR *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$205,000, or any other sum or sums, for the purchase or acquisition and equipping of a new Multi-Purpose Tractor with attachments for the Department of Public Works, including all incidental and related expenses; or act on anything relative thereto.

Submitted by the Public Works Director. (Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to purchase a new Multi-Purpose Sidewalk Tractor with various attachments to replace an older model. This equipment is used to clear the snow and debris from various walkways throughout Town and supplements the roadside mowing with the boom flail mower. The multi-purpose tractor is exposed

to many different environments including damaging branches, stone walls, hidden iron castings and corrosive materials (salt) which cause disintegration of the equipment. As the equipment ages, it requires additional mechanical and body work to keep it operational. These multi-purpose machines are expected to last approximately 7-10 years.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 20. 6-WHEEL COMBO BODY DUMP TRUCK W/ PLOW & WING

(Consent Calendar)

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of, the sum of \$285,000, or any other sum of sums, for the purchase or acquisition and equipping of a new vehicle for the Department of Public Works, including all incidental and related expenses; or act on anything relative thereto.

Submitted by the Public Works Director.

(Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to purchase a new 6-Wheel Combo Body Dump Truck with plow and wing to replace an older model. The existing truck is at its useful life-expectancy of about 15 years. Due to the caustic nature of the salt and chemical additives used in snow removal operations, the bodies of these vehicles disintegrate much sooner than the total number of hours or miles would typically indicate, in spite of being washed after every treatment event. Being a dedicated spreader, this vehicle is not currently used during the construction season. It is the goal of the Public Works to focus on standardizing vehicles and specifying vehicles to better suit our multi-disciplinary needs. This proposal is to replace the existing dedicated spreader with a combination body (dump truck and spreader) to be used throughout all seasons. The Public Works employees use these vehicles to perform their everyday tasks including moving materials and equipment that is carried and towed by these vehicles.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 21. STREET ACCEPTANCE – ANTHONY DRIVE

To see if the Town will vote to accept as a public way:

Anthony Drive from North Road/Route 117 to a dead end, a distance of 613 feet +/-

as laid out by the Select Board in accordance with the descriptions and plans entitled “Street Acceptance Plan Anthony Drive, Sudbury, Massachusetts” Prepared for Distinctive Acton Homes, Inc. by Foresite Engineering, dated December 5, 2019, on file in the Town Clerk’s Office; and to

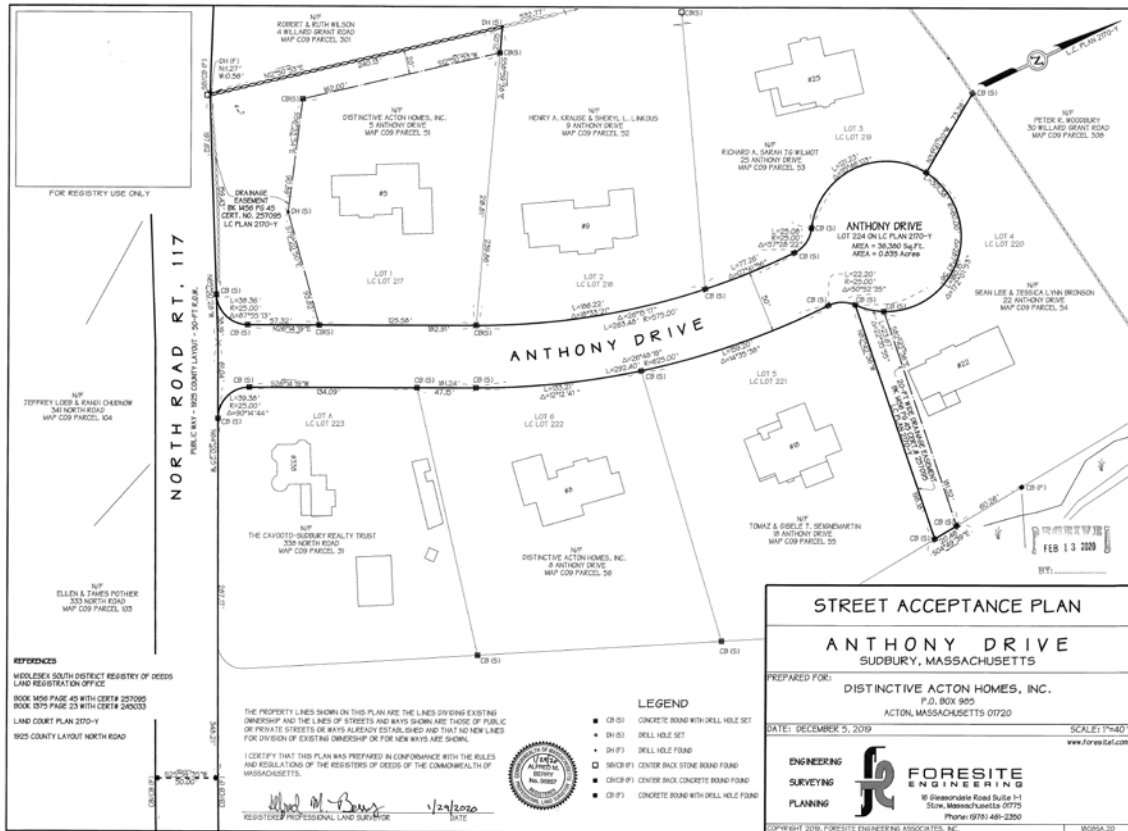
authorize the Select Board to acquire by purchase, by gift, or by eminent domain, an easement or fee simple, over the ways shown on said plans and any associated drainage, utility, or other easements for all purposes for which public ways are used in the Town of Sudbury; and to raise and appropriate or transfer from available funds a sum or sums of money therefor and all expenses in connection therewith; or act on anything relative thereto.

Submitted by the Select Board.

(Two-thirds vote required)

SELECT BOARD REPORT: Prior to Town Meeting the Select Board will hold a public meeting and receive a recommendation from the Planning Board relative to approval of the layout of this road. If the above street is voted and accepted by Town Meeting as a public way, all future maintenance and repair of the roadway will be performed by the Town.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.



ARTICLE 22. MEANS TESTED SENIOR TAX EXEMPTION EXTENSION

(Consent Calendar)

To see if the Town will vote to extend for FY22, FY23, and FY24 the application of Chapter 169 of the Acts of 2012 entitled, “An act authorizing the town of Sudbury to establish a means tested senior citizen property tax exemption”, as amended by Chapter 10 of the Acts of 2016, or act on anything relative thereto.

Submitted by the Board of Assessors.

(Majority vote required)

BOARD OF ASSESSORS REPORT: Chapter 10 of the Acts of 2016 allows for a continuation of the Exemption Program, provided Town Meeting approves the program continuation every 3 years. The program is due for continuation for the next 3 fiscal years. A majority vote at an Annual or Special Town Meeting is required for passage.

The Sudbury Means Tested Senior Exemption Program reduces real property taxes for certain low to moderate-income seniors through a redistribution of the property tax burden within the residential class. Therefore, there is a residential tax rate increase associated with the implementation of the Program (any exemption is shifted to the non-qualifying residential real property owners in Town). The exemption does not impact the Commercial, Industrial or Personal Property classes.

In FY 2014, 118 applications for the exemption were approved with an average benefit of \$2,450. In FY 2014, the average single-family tax increase attributable to the program was \$45.

In FY 2015, 124 applications for the exemption were approved with an average benefit of \$2,664. In FY 2015, the average single-family tax increase attributable to the program was \$60.

In FY 2016, 103 applications for the exemption were approved with an average benefit of \$3,288. In FY 2016, the average single-family tax increase attributable to the program was \$61.

In FY 2017, 111 applications for the exemption were approved with an average benefit of \$3,282. In FY 2017, the average single-family tax increase attributable to the program was \$63.

In FY 2018, 113 applications for the exemption were approved with an average benefit of \$3,664. In FY 2018, the average single-family tax increase attributable to the program was \$73.

In FY 2019, 112 applications for the exemption were approved with an average benefit of \$3,735. In FY 2019, the average single-family tax increase attributable to the program was \$67.

In FY 2020, 106 applications for the exemption were approved with an average benefit of \$3,999. In FY 2020, the average single-family tax increase attributable to the program was \$76.

In FY 2021, 101 applications for the exemption were approved with an average benefit of \$4,247. In FY 2021, the average single-family tax increase attributable to the program was \$75.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 23. SUDBURY PUBLIC SCHOOLS COVID-19 STUDENT ACADEMIC PROGRAM

To see if the Town will vote to raise and appropriate, and/or transfer from available funds, the sum of \$309,540, or any other sum or sums, to be expended under the direction of the Sudbury Public School District for the purpose of providing targeted general education services to students in an effort to mitigate the learning impacts as a result of COVID-19; or act on anything relative thereto.

Submitted by the Sudbury Public Schools School Committee. (Majority vote required)

SPS SCHOOL COMMITTEE REPORT: This article is seeking the funding and appropriation for the purpose of Sudbury Public Schools to create a five (5) week summer program for elementary students in order to mitigate learning impacts from COVID-19. The program will target 2021-22 elementary students (K-5) and focus on numeracy and literacy skills. Instruction will be provided by trained educators and align with the Sudbury Public Schools curriculum using a 1:10 teacher to student ratio. The program is designed to accommodate approximately 40 students per grade level for each of the academic modules. Administrative and nursing staff will be on-site to support the program.

Eligibility for the program will be determined, in part, by spring benchmarking data using established assessment measures and educator recommendation. Students will be referred to one of the two academic modules with the option to attend a social module. The social module will be run in partnership with Sudbury Park and Recreation and will have a fee associated with attendance based on income levels. Transportation is available as is lunch for qualifying students qualifying for free or reduced lunch or financial aid.

The Summer Math Intervention and Literacy Engagement Program (SMILE) will complement the existing Extended School Year (ESY) program for students receiving special education services per their IEP by being held at the same location and providing opportunities for collaboration and inclusion.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 24. NOYES ELEMENTARY SCHOOL FIRE ALARM SYSTEM REPLACEMENT

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$220,000, or any other sum or sums, to be expended under the direction of the Sudbury Public School Department for the purpose of replacing the existing fire alarm system at the Peter Noyes

Elementary School, including but not limited to renovation to the building and any incidental and related costs and expenses; or act on anything relative thereto.

Submitted by the Sudbury Public Schools School Committee. (Majority vote required)

SPS SCHOOL COMMITTEE REPORT: This project will replace the entire existing Simplex fire alarm system to include a new nonproprietary notifier addressable master control panel, annunciator panel, smoke detectors, duct smoke detectors, beam detectors, magnetic door hold open devices and all associated piping and wiring. The design for this project has been funded and is complete.

The 25+ year old Simplex fire alarm system has become problematic to maintain in working order, and is subject to an increasing number of system malfunctions and repairs. Parts for repair are increasingly difficult and expensive to obtain.

Attempts to maintain the system, obtain failing components and fund system repairs with operational maintenance budgets is unsustainable.

The new addressable system will transmit information via a radio box to the Fire Department with the precise location and nature of any alarm. Responding crews will have this pre-arrival information and be directed to the exact area and source of any alarm.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 25. LINCOLN-SADBURY REGIONAL HIGH SCHOOL STADIUM
FIELD AND COMMUNITY TURF FIELD REPLACEMENT**

To see if the Town will vote to raise and appropriate, transfer from available funds or borrow the sum of \$337,500, or any other sum or sums, as the Town's 50% share of the total project cost of \$675,000 for replacing the Community Stadium Field Turf located on the property of the Lincoln-Sudbury Regional High School, including all incidental and related costs, such sum to be added to the \$337,500 already committed by the Regional School District for its 50% share from the School's Excess and Deficiency Account, such sums to be expended under the direction of the Lincoln-Sudbury Regional School Committee; or act on anything relative thereto.

Submitted by the Lincoln-Sudbury School Committee. (Majority vote required)

LINCOLN-SADBURY SCHOOL COMMITTEE REPORT: Purpose: The original turf field was completed in 2004. The field is not only used by Lincoln-Sudbury Regional High School Football, Soccer, Lacrosse and Rugby teams, but also the Sudbury Parks and Recreation Department for various community sporting events. The length of the artificial turf fiber has declined due to normal wear and tear as well as ultraviolet sunlight exposure. The risk of injury greatly increases as the rubber pellets in the fibers grab onto cleats while the athlete is in motion resulting in ankle and knee injuries. Additionally, since the installation of the original field it is recommended that fields that host high impact sports have a shock pad installed under the turf to minimize potential

concussion injuries that meet the new concussion guidelines.

Replacing the artificial turf field will provide a safe playing field for Community sports teams and Lincoln-Sudbury Regional School District athletes.

Cost: The total project cost is estimated at \$675,000 with Sudbury's share of 50% totaling \$337,500 for the Sudbury Request. LS School Committee had voted to reserve a portion of \$337,500 from Excess and Deficiency back in 2019.

This is the second year of funding requests for this project through the CAPCOM process.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 26. AMEND ZONING BYLAW, ARTICLE IX: AMEND TEXT OF SECTION 2110. ESTABLISHMENT

To see if the Town will vote to amend the Zoning Bylaw, Article IX, Section 2110, by deleting the strikethrough text and inserting the underlined text, all as set forth below:

2110. Establishment. For the purposes of this Bylaw, the Town of Sudbury is hereby divided into the following districts:

- Single Residence "A" (A-Res.)
- Single Residence "C" (C-Res.)
- Wayside Inn Historic Preservation (WI)
- Business (BD)
- Limited Business (LBD)
- Village Business (VBD)
- Industrial (ID)
- Limited Industrial (LID)
- Research (RD)
- Industrial Park (IP)
- Open Space (OS)

Except as otherwise provided herein, the boundaries of these districts are defined and set forth on the map entitled, "Zoning Map, Town of Sudbury, last amended April, 1994," as may be subsequently amended by vote of Town Meeting. This map is on file with the Town Clerk. The zoning map, with all explanatory matter thereon, is hereby made a part of this Bylaw.

The location of Districts is further described in narrative form with accompanying maps in Appendix C.

"Overlay" districts are also hereby created: Flood Plain Overlay District (reference section 4100); ~~Historic Districts (Old Sudbury and Hudson Road Historic District, Wayside Inn Historic Districts 1 and 2, King Phillip Historic District (reference Appendix C),~~ Water Resource Protection Overlay District (reference section 4200); Wireless Services Overlay District (reference section 4300); Mixed-Use Overlay District (reference section 4700); North Road Residential Overlay District (reference section 4700A); Melone Smart Growth Overlay District (reference section 4700B); and Historic Districts (Old Sudbury and Hudson Road Historic District, Wayside Inn Historic Districts 1 and 2, King Philip Historic District, and George Pitts Tavern Historic District) (reference Appendix C) and ~~Wastewater Treatment Facility Restricted Zones (reference section 4500).~~

; and further, to authorize non-substantive changes to the numbering and formatting of this bylaw so that it be in compliance with the numbering format of the remainder of the Zoning Bylaw; or act on anything relative thereto.

Submitted by the Planning Board. (Two-thirds vote required)

PLANNING BOARD REPORT: The Planning Board will report at Town Meeting.

SELECT BOARD POSITION: The Select Board supports this article.

ARTICLE 27. AMEND ZONING BYLAW, ARTICLE IX: AMEND TEXT OF SECTION 2324 REGARDING TRAILERS OR OTHER STRUCTURES FOR STORAGE OR OFFICE PURPOSES

To see if the Town will vote to amend the Zoning Bylaw, Article IX, Section 2324 regarding trailers or other structures for storage or office purposes by deleting the strikethrough text and inserting the underlined text, all as set forth below:

2324. The temporary use (six months or less) of trailers, containers, or other transportable components structures for storage or office purposes is allowed if permitted as of right in Section 2230. Table of Principal Use Regulations (Appendix A) or with the review and approval of the Building Inspector. The use of trailers, containers, or other transportable components for storage or office purposes for longer than six months is only permitted if allowed as of right in Section 2230. Table of Principal Use Regulations (Appendix A) or by special permit from the Zoning Board of Appeals. In all cases trailers, containers, or other transportable components for storage or office purposes shall not be stacked on top of one another where they conform to the procedural regulations adopted by the Board of Selectmen.

; and further by amending Section 7000. Definitions by adding and inserting alphabetically the following definitions associated with the amendments above:

Container: Typically, but not limited to, being 8 feet wide, 8.5 feet high, and 10 to 40 feet long, constructed entirely of steel with securable doors and designed to be taken over the road or on a ship to transport dry goods.

Trailer or Semi-Trailer: Typically, but not limited to, having a maximum length of 53 feet, a maximum height of 13.5 feet, and a maximum width of 8.5 feet, being an enclosed box with a single or double set of wheels to be towed by a tractor over the road for the purpose of transporting dry goods.

; and further, to authorize non-substantive changes to the numbering and formatting of this bylaw so that it be in compliance with the numbering format of the remainder of the Zoning Bylaw; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: The Planning Board will report at Town Meeting.

SELECT BOARD POSITION: The Select Board supports this article.

ARTICLE 28. AMEND ZONING BYLAW, ARTICLE IX: AMEND TEXT OF SECTION 3200. SIGNS AND ADVERTISING DEVICES

To see if the Town will vote to amend the Zoning Bylaw, Article IX, Section 3200 by deleting the strikethrough text and inserting the underlined text, all as set forth below:

3200. SIGNS AND ADVERTISING DEVICES.

3210. Purpose. The following sign regulations are intended to serve these objectives: (a) to facilitate efficient communication; (b) to avoid conflict between signs and the visual qualities of their environs; and (c) to support business vitality within non-residential districts by accomplishing the above objectives without burdensome procedures and restrictions.

3220. General Regulations. The following regulations shall apply in all districts:

3221. No exterior sign or advertising device shall be erected except as provided by this Bylaw.

3222. No sign which requires a sign permit under this Bylaw shall be erected except in the exact location and manner described in the permit.

3223. No sign shall be erected that in any way creates a traffic hazard or obstructs traffic.

3224. No sign shall be painted or posted directly on the exterior surface of any wall. All exterior attached signs shall be painted, posted or otherwise securely affixed to a substantial intermediary removable surface and such surface shall be securely affixed to the wall of the building. The foregoing, however, shall not prevent installation of a sign by individual letters or devices cut into or securely affixed to the exterior of a building, provided that such letters

or devices have a minimum depth of projection of one fourth (1/4) of an inch. The construction of the sign shall comply with the State Building Code.

3225. No sign shall be illuminated between the hours of 11:00 P.M. and 6:00 A.M. except signs on premises open for business.

3226. Only white lights shall be used for direct illumination of a sign. The illumination of any sign shall be shaded, shielded, directed and maintained at a sufficiently low intensity and brightness that it shall not affect the safe vision of operators of vehicles moving within the premises or on any adjacent public or private ways. All illumination of any signage shall be Dark Sky Compliant per the International Dark Sky Association.

3227. Any sign which advertises or identifies products, businesses, services or activities which are no longer sold, located or carried on at the premises shall be removed within 60 days.

3230. Sign Permits. All signs shall require a sign permit except as provided in Section 3250, herein. No sign which requires a sign permit shall hereafter be constructed except in conformity with a sign permit from the Building Inspector. Applications for building or sign permits shall be obtained from the Building Department and shall contain the following information:

- a. the location by street number, of the proposed sign;
- b. the name and address of the sign owner and the owner of the premises where the sign is to be located, if other than the sign owner;
- c. a scale drawing showing the proposed construction, method of installation or support, colors, dimensions, location of the sign on the site, and method of illumination;
- d. such other pertinent information as the Building Inspector may require to ensure compliance with the bylaw and any other applicable law; and
- e. the application must be signed by the owner of the sign and the owner of the premises where the sign is to be located.

3231. The Building Inspector shall refer all applications to the Design Review Board for recommendations in conformance with Section 6540 of this bylaw. The Design Review Board shall have the authority to reject any sign permit application which is not complete when submitted

3232. Time Limitations. The Design Review Board shall approve or disapprove any application for a sign permit within 30 days of receipt of the application. If the Building Inspector should fail to act on an application for a sign permit within such 30 day period, the application shall be deemed to be denied.

3233. Fees. The Board of Selectmen shall establish and from time to time review a sign permit fee which shall be published as part of the sign permit application.

3240. Signs Prohibited in All Districts.

3241. Lightboxes, LED (light-emitting diode) electronic displays, and stencil cut illuminated sign boxes.

3241A. Neon signs

3242. Billboards, except non-commercial third party signs on municipally owned property.

3243. String lights used in connection with commercial premises with the exception of temporary lighting for holiday decoration; signs consisting of strings of banners, posters, pennants, ribbons, streamers, and spinners or similar devices.

3244. Flashing or oscillating signs or signs with moving lights or rotating beacons; animated signs; rotating signs; signs which move by design or have a major moving part.

3245. Signs emitting audible sound, odor or visible matter.

3246. Permanent paper, cardboard, cloth, canvas, plastic or similar non-rigid material signs, tacked, posted, or otherwise affixed to the walls of any structure, tree, pole, hydrant, bridge, fence, or any other surface. Interim (temporary) signs and all of their aspects (size, material, permitted duration, etc.) may be permitted at the discretion of the Building Inspector while a permanent sign is being permitted, created, or waiting to be installed, but for no longer than six months.

3247. Portable signs and changeable copy signs, except as permitted in section 3259A.

3248. Signs having the shape and color of a traffic control device; signs which are of a size, location, movement, content, coloring, or manner of illumination which may be confused with or construed as a traffic or street sign or signal; signs which contain or are an imitation of an official traffic sign or signal or contain the words "stop", "slow", "caution", "danger", "warning" or similar words.

3249. Signs creating a potential hazard to the safe, efficient movement of vehicular or pedestrian traffic or which contain statements, words, or pictures of an obscene, indecent, or immoral character, that will offend public morals or decency.

3249A. Integral roof signs.

3250. Signs Which Do Not Require a Sign Permit.

3251. Resident Identification Sign. One sign, which shall not exceed two (2) square feet in area and, if lighted, shall use direct illumination with white light only and be Dark Sky Compliant per the International Dark Sky Association.

3251A. Property Owner's. "No Trespassing" signs or the like.

3252A. Governmental, Utility or Public safety signs: None of the provisions of this bylaw shall be construed as preventing or limiting any traffic, directional, informational, educational or identification sign owned and installed by a governmental agency.

3252B. Religious institution signs.

3253. Real Estate Signs. One real estate sign, not over six (6) square feet in area advertising the sale or rental of the premises on which it is located is permitted. Such signs shall be removed within 30 days of the completion of the sale, rental or lease.

3254. Construction Signs. One temporary construction sign which shall not exceed twenty (20) square feet in area, in all districts, shall be confined to the site of the construction, including subdivisions of land as defined in G.L. c. 41, 81L, shall not be erected prior to the issuance of building permit and shall be removed within seven days of completion of construction, issuance of the occupancy permit, or after the intended use of the project has begun, whichever comes first.

3255. Window Signs. One or multiple signs that in aggregate shall not exceed 25% of the window area. Such signs shall not be illuminated other than by standard lighting fixtures on the building and shall be Dark Sky Compliant per the International Dark Sky Association. However, "Open" or "Closed" window signs may be self-illuminated and such signs shall be no larger than two (2) square feet in area. Window signs promoting a public service or charitable event shall not be calculated in the allowable 25%.

3256. Fuel Pump Signs.

3257. Vehicle Signs. Except where the signs are mounted on parked vehicles for the purposes of advertising goods or services sold or provided on the property where the motor vehicle is parked or elsewhere either by direct sale or by order, signs normally painted on or attached to a motor vehicle identifying the owner and his or her trade and signs advertising the sale of the motor vehicle itself shall be allowed.

3258. Signs on Product Dispensing Devices. Signs integral to automated devices, not to include vehicles or gas pumps, which dispense one or more products, when the sign identifies the product(s) contained therein, provided the sign does not project beyond the device. Signs, which are affixed but not integral to the device, are not allowed.

3259. Flags, and banners conforming to section 3271 of this bylaw.

3259A. Portable Signs. One portable sign is allowed per business provided:

- a. The sign does not exceed six (6) square feet per side and is no more than thirty (30) inches wide.
- b. The top of any portable sign must be less than four (4) feet above grade.
- c. All lettering shall be done in a professional workmanlike manner.
- d. Portable signs shall not be permitted on properties containing a single business which has a freestanding sign.
- e. For properties containing multiple businesses, no more than two (2) portable signs shall be displayed at a time on any lot.
- f. Portable signs may only be displayed during the hours that the business is open or operating, but shall be removed at sunset.
- g. Portable signs shall not be illuminated, have flashing lights, emit sound or simulate motion, nor have any attachments adding to their height or width.
- h. Portable signs must not create a potential hazard to vehicular or pedestrian traffic.
- i. Signs which do not comply with any provision of this bylaw may be removed immediately and without notice by the Town.
- j. A permit for a Portable Sign shall be issued at the discretion of the Building Inspector for a period not to exceed one year and at a fee of \$250 annually.

3260. Signs Requiring a Sign Permit in the Business, Limited Business, Village Business, Industrial, Limited Industrial, Industrial Park and Research Districts. Any principal use permitted in the Business, Limited Business, Village Business, Industrial, Limited Industrial, Industrial Park and Research Districts may erect a sign or signs subject to the following:

3261. Exterior Wall Signs.

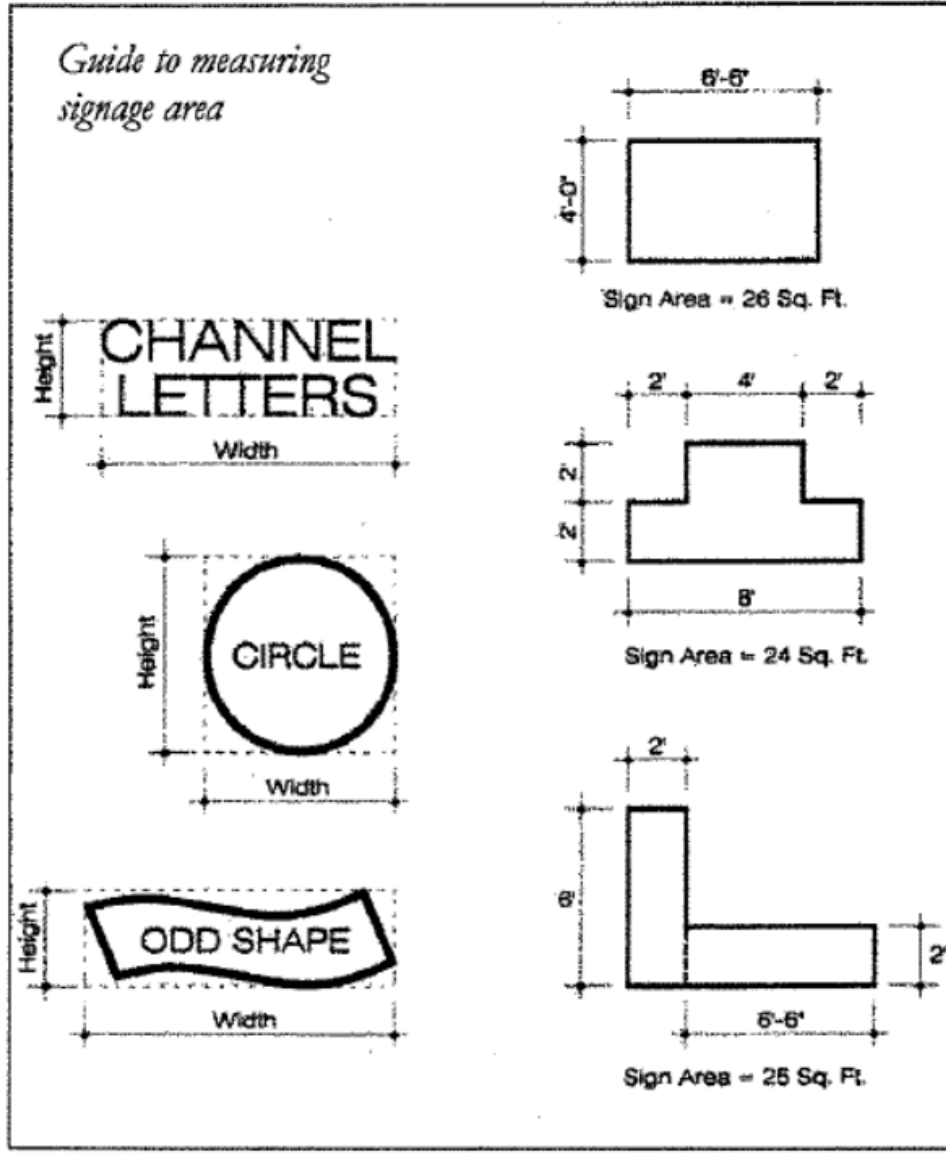
- a) First Floor Businesses. Except as may otherwise be provided, one primary and two secondary exterior wall-mounted, projecting, or roof signs shall be permitted for each first floor business, not including directional signs, on the building in which the business is located. -The total allowed sign face area of all exterior signs is calculated by taking 100% of the primary building frontage plus 40% of each secondary building frontage, up to a maximum of three total building frontages. The total size of the business signage is shown in Chart A. The primary sign shall represent no more than 75% of the total allowed sign face area. Where more than one business/entity occupies the same physical space and shares the same entry/entries, the total allowed sign face area of all exterior signs shall be the same as if only one business was occupying the space. Secondary signage must be affixed to that portion of a building which is occupied by the business affixing such sign. If the sign is a series of awning valances it is considered one secondary sign. The square footage allowance is for direct-illuminated signs. Those primary or secondary signs which are self-illuminated silhouette or face-lit channel letters shall have their square footage allowance reduced by one-third (1/3). Any lighting for signage shall be Dark Sky Compliant per the International Dark Sky Association.

CHART A

Building Frontage (In linear feet)	Maximum Area of Total Sign Face (In square feet)
0.1 to 19.9	30
20 to 39.9	33
40 to 59.9	36
60 to 79.9	39
80 to 99.9	42
100 to 119.9	45
120 to 139.9	48
140 to 159.9	51
160 to 179.9	54
180 to 199.9	57
200 to 219.9	60
220 to 239.9	63
240 and above	65

b) **Second Floor Businesses.** One primary exterior wall mounted sign shall be permitted for each second floor business, not to exceed ten (10) square feet. No such sign shall obscure windows or other architectural elements on a building.

c) Methodology for Measuring Sign Face Area.



3262. Projecting signs. A projecting sign may be erected in lieu of an exterior sign only when such exterior sign is permitted under Section 3261, providing it does not exceed sixteen (16) square feet per side. The projecting sign shall not extend beyond the top of the roof or ridge line of the building.

3263. Directory Sign/General Directory Sign: One directory wall sign on which the sign face shall not exceed one square foot for each occupant identified in the directory. A similarly sized freestanding sign may be erected provided it is substantially out of view of the public way. If there is a panel supporting a group of individual tenant names, that panel shall not exceed 110% of the aggregate area of the individual names.

3264. Directional Signs. Directional signs may be erected near a street, driveway or parking area if necessary for the safety and direction of vehicular or pedestrian traffic. The sign face of each directional sign shall not exceed two (2) square feet and no directional sign shall be located more than six (6) feet above ground level if mounted on a wall of a building or more than three and one-half (3½) feet above the ground if freestanding. Directional signs shall be placed so as to not impair vehicular sight lines.

[3265, 3265A ATM 4/14/2004](#)

3265. Freestanding Signs. One freestanding sign (business center identification or business sign) may be erected on a lot zoned business, industrial, or research, or on a lot containing a primary commercial use that has been permitted by the Town of Sudbury, subject to sections 3265A, 3265B and 3266 of the bylaw.

3265A. Freestanding Business Center Identification Sign. One freestanding business center identification sign may be erected on a lot. The size of the sign face and the setbacks shall not exceed the allowances in Charts B and C (starting with Chart B and proceeding to Chart C).

CHART
B

Street Frontage (In linear feet)	Maximum Area of each Sign Face (In square feet)
0.1 to 74.9	12
75 to 149.9	16
150 to 249.9	20
250 to 349.9	24
350 and above	30

CHART C

If the Area Of the Sign Face In Chart B does not Exceed (In square feet)	The Minimum setback From the Front property line shall be (In linear feet)	Minimum setback From Side property line shall be (In linear feet)
30	20	5
24	16	5
20	12	5
16	8	5
12	4	5

[3265B ATM 4/14/2004](#)

3265B. Freestanding Business Sign. One freestanding business sign may be erected on a lot subject to the following requirements:

- a. The lot has a minimum of two hundred and fifty (250) feet of street frontage.
- b. Building setback must be twenty (20) feet or greater.
- c. If the lot contains multiple businesses, individual businesses may be represented by separate, removable panels, which shall not exceed eighteen inches (18”) in height nor be less than eight inches (8”) in height.
- d. All freestanding directory signs shall be wood carved or a synthetic material which matches the aesthetics of a wood sign, and shall not be internally illuminated.
- e. The size of the sign face and the setbacks shall not exceed the allowances in Charts B and C (starting with Chart B and proceeding to Chart C). The property address shall be included as a sign cap centered on top of the sign, but will not be counted in maximum sign size (not to exceed 4 square feet).
- f. ~~Typeface on individual business panels shall be of a uniform nature color scheme.~~
- g. The freestanding sign shall be incorporated into the landscaping and streetscape of the property, and its location shall be approved by the Design Review Board.
- h. Individual business panels shall be considered secondary signs for the purposes of calculating total sign allowance in section 3261a).
- i. No other freestanding signs shall be permitted on the street frontage.
- j. All existing non-conforming signs must be brought into conformance with the bylaw before approval of the freestanding business sign.
- k. Any illumination of freestanding signage shall be Dark Sky Compliant per the International Dark Sky Association.

3266. The overall maximum height of any freestanding sign shall not exceed ten (10) feet, and the distance from the ground to the bottom of the sign shall not exceed 40% of the total height of the sign.

3270. Special Provisions.

3271. Banners. Any business may have a maximum of one banner mounted on the building facade. Banners may also be erected on light or utility poles on private property displaying common or season themes, up to a maximum of one banner per fifty (50) parking spaces constructed on the premise. Banners erected on public property shall require the approval of the Board of Selectmen. Banners may pictorially represent the nature of the business and may only include verbiage to the extent that the block of verbiage does not exceed 15% of the total area of the banner. A banner shall not exceed 15 square feet.

3280. Signs Requiring a Sign Permit in the Residential Districts.

One sign either attached or freestanding, pertaining to a multi-unit development or a permitted non-residential principal use such as farms, farm stands, nurseries, greenhouses, child care centers and similar uses may be erected upon a lot provided no other sign(s) permitted by this bylaw shall be on the same lot. The sign face shall not exceed ten (10) square feet and, if freestanding, the height shall not exceed ten (10) feet and the distance from the ground to the bottom of the sign shall not exceed 40% of the height of the sign. The freestanding sign shall not be located within ten feet (10') of any street or property line.

3290. Special Permits. The Board of Appeals may issue Special Permits for signs other than as provided herein if it is determined that: (a) the architecture of the building, the location of the building with reference to the street or the nature of the establishment is such that the sign should be permitted in the public interest; (b) the sign will not cause visual confusion, glare, offensive lighting in the neighborhood; (c) the sign will not be a detriment to the surrounding area; (d) the sign will not significantly alter the character of the zoning district; (e) the sign will not interfere with traffic safety in the area; and (f) the sign will be consistent with the architecture of the building on the lot upon which the sign is to be located and of the surrounding area. In granting such permission, the Board of Appeals shall specify the size and location of the sign or signs and shall impose such other terms and restrictions as it may deem to be in the public interest. All applications under this provision shall provide the information required in Section 3230 above and specific information in the form of perspectives, renderings, photographs or other representations sufficient to show the nature of the proposed sign, its effect on the immediate surroundings and the reasons for allowing it.

3290A. Design Guidelines. The following are further means by which the objectives for signs stated at the beginning of Section 3200 can be served. These guidelines are not mandatory, but degree of compliance with them may be considered by the Design Review Board and by the Special Permit Granting Authority in acting upon permits authorized under this section, as may consistency with the basic sign objectives cited above.

3291A. Efficient Communication.

- a. Signs should not contain selling slogans or other advertising which is not an integral part of the name or other identification of the enterprise.
- b. Signs should be simple, neat and avoid distracting elements, so that content can be quickly and easily read.

3292A. Environmental Relationship.

- a. Sign design should take into consideration the size, brightness, style, height and colors of other signs in the vicinity.
- b. Sign brightness should not be excessive in relation to background lighting levels, e.g. averaging not in excess of 100 foot-lamberts in the commercial area of similarly bright areas and not in excess of 20 foot-lamberts in unlighted outlying areas and in areas bordering on or visible from residential zones.

3293A. Building Relationship.

- a. Signs should be sized and located so as not to interrupt, obscure, or hide the continuity of columns, cornices, roof eaves, sill lines, or other elements of building structure, and where possible, should reflect and emphasize building structural form.
- b. Sign materials, colors, and lettering should be reflective of the character of the building to which the sign relates.
- c. Clutter should be avoided by not using support brackets extending above the sign or guy wire and turn buckles.

3290B. Non-conformance. Any non-conforming sign legally erected prior to the adoption of this bylaw may be continued and maintained but shall not be enlarged or altered unless it conforms with the provisions contained herein. The exemption herein granted shall terminate with respect to any sign which:

3291B. Shall have been abandoned;

3292B. Advertises or calls attention to any products, business or activities which are no longer carried on or sold, whether generally or at the particular premises;

3293B. Shall not have been repaired or properly maintained within sixty (60) days after notice to that effect has been given by the Building Inspector;

3294B. Which has been destroyed or damaged to the extent that the cost of repair or restoration will exceed one-third of the replacement value as of the date of destruction.

; and further, to authorize non-substantive changes to the numbering and formatting of this bylaw so that it be in compliance with the numbering format of the remainder of the Zoning Bylaw; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: The Planning Board will report at Town Meeting.

SELECT BOARD POSITION: The Select Board supports this article.

ARTICLE 29. COMMUNITY PRESERVATION FUND – DR. BILL ADELSON PLAYGROUND IMPROVEMENTS *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$285,000 from the Open Space and Recreation category of Community Preservation Act Funds, funded from FY22 revenue, for the purpose of making improvements to the Dr. Adelson Playground at Haskell Field including removing and replacing poured-in-place surfaces, replacing equipment, preserving or planting new trees, and other site work, and including all incidental and related costs; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Dr. Adelson Playground (aka the SMILE Playground) improvement project will rehabilitate the surface of an outdoor recreational facility on property dedicated to outdoor activity. The Dr. Adelson Playground supports recreational uses, serves the general public (available to all residents), and expands the use to allow access to all areas of the playground without tripping hazards.

The Dr. Adelson Playground is the most heavily-used public playground in Sudbury and is used during all seasons of the year. Areas of the poured-in-place (PIP) rubberized surface need to be replaced due to age and subsurface root intrusion. Tree roots are causing the surface of the PIP to undulate. This undulation is a tripping concern for all users and spectators of the playground. As of March 2011, play areas need to be compliant with Americans with Disabilities Act (ADA) standards. This project will enhance the Dr. Adelson Playground by bringing the surfaces up to current standards and allowing full participation on the playground for all children with disabilities.

There are areas within the playground which contain wood safety fiber material. These wood chips do not meet the requirements for full accessibility as they impede wheelchair movements and leave an uneven surface which requires constant raking-out. However, some of these areas must remain as they are needed to allow access to the underground clean outs for the septic system.

The current PIP has ripped and cracked, and has been pushed up by the roots of the large tree in the park as well as trees which border the park on the outside of the fence. These uneven surfaces do not allow for wheelchairs to move easily throughout the playground and pose a tripping hazard. The tree in the center of the playground will be removed and replaced with a shade structure. The Park and Recreation Department will investigate the preservation of the trees outside the fence but adjacent to the playground. These trees will either be preserved or replaced by a more suitable variety.

Playground equipment that is not ADA compliant and unsupported by the manufacturer for replacement parts will be removed and replaced with modern equipment with appropriate shade structures.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 30. COMMUNITY PRESERVATION FUND – FRANK FEELEY FIELDS IMPROVEMENTS *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$386,000 from the Open Space and Recreation category of Community Preservation Act Funds, funded from the FY22 revenue for the

purpose of designing improvements to the Frank Feeley Fields located at 200 Raymond Rd. and to the construction of improvements including, but not limited to, installing dugouts, constructing a protective guardrail for the batting cage, installing protective netting, and drainage improvements, and any incidental and related cost; or act on anything related thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Frank Feeley Fields are home to the Town tennis courts, several softball fields, and a baseball field. There is one 90-foot, lighted baseball diamond with a press box, bleachers, concession area, and restrooms; three 60-foot softball diamonds on two field levels; and six tennis courts. The softball diamonds have several safety issues regarding lack of protection from foul balls and the sun. Further, the swamp-like conditions on the two lower fields limit utilization during the key playing season.

The Sudbury Girls Softball (SGS) is requesting funds in two phases. This article is the first phase representing design improvements for all the fields. Design costs will include mitigating for significant water issues at the Lower Feeley Fields. The implementation of outfield water management will be in the second phase.

The first phase, funded by this request, also focuses on the safety of the participants and spectators. The girls' softball fields in Sudbury do not have protective dugouts, which are common at all other ball fields in Sudbury, to shield players from foul balls, overthrows, and peak sun. SGS is requesting funds for the construction of dugouts for the Upper Feeley and Feeley #1 softball diamonds.

Due to the close proximity of the tennis courts to the field at Upper Feeley, foul balls are frequently hit onto the tennis courts or the area where children, spectators, and families are sitting or standing during games. The lack of protection from foul balls is creating a dangerous environment. SGS is requesting funding to construct protective netting on the first base side of the Upper Feeley softball diamond to provide spectator and tennis player protection. It should be noted that when citizens of Sudbury are playing tennis, their backs are to the softball field and there is little warning when a hard-hit foul ball flies into the courts.

The SGS batting cage sits in the Feeley Fields parking lot which has a steady flow of cars coming and going from the area. SGS is requesting funding to build a timber guardrail to provide a safety barrier between the batting cage and the parking lot for the SGS players who practice frequently in the batting cage.

This funding request will provide substantial safety improvements to two primary softball diamonds, Upper Feeley and Feeley #1, as well as the key practice area around the batting cage. Without these much needed improvements, SGS will continue to underutilize Feeley Fields due to the unsafe and wet conditions. The Frank Feeley Fields improvements would increase use of these recreational areas, serve the general public (available to all residents), and expand the use to allow access to all areas of the fields. The goal is to have a similar structure as the boys' baseball fields providing safety and shelter from stray balls. This request for funding is to keep this vibrant softball community strong with quality fields that may be equal or similar to the fields used by the baseball community.

In addition to this Community Preservation Act allocation, Sudbury Girls Softball has pledged \$7,000 to this project and the Park and Recreation Commission has pledged \$25,000 for design purposes.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 31. COMMUNITY PRESERVATION FUND – HISTORIC PRESERVATION PLAN
(Consent Calendar)

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$32,000 from the Historic Resources category of Community Preservation Act Funds, funded from Historic Resources reserves, for the purpose of preservation of historic resources, specifically by funding the preparation of a town-wide Historic Preservation Plan, including all costs incidental and related thereto; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Historical Commission is requesting Community Preservation Act funds for the creation of a town-wide Historic Preservation Plan modeled after the Massachusetts Historical Commission’s sample plan.

An Historic Preservation Plan is the foundational planning document for a community’s historic preservation goals and efforts. It offers a comprehensive review of existing preservation conditions, and a proactive collaborative approach to protecting the community’s historical and archaeological resources. It is the road map for preservation policies and activities for Town boards as well as the community. It is a standalone document that focuses on making history, heritage, and historic character strong building blocks for revitalization, growth, and tourism. A cultural resource consultant will be retained to create the plan. It is developed with input from residents; property owners; Town boards, committees, and commissions; and interested town preservation organizations.

Although many (but not all) of the town’s historic resources have been identified and inventoried, no “master plan” for the town’s historical or archaeological resources has ever been formulated – unlike other historic communities in Massachusetts, including neighboring Concord. There are several Town commissions/committees, groups, and individuals with narrow responsibilities engaged in historic preservation, but overall community focus on historic preservation is lacking.

A town-wide Historic Preservation Plan would be a substantial public benefit as the plan would include a road map and guidance on achieving common preservation goals, and how these could be coordinated and accomplished among many different entities and individuals. As was heard from community members during the recent Master Plan update process, many residents indicated one of the reasons they moved to Sudbury and remain in Sudbury is its historic charm and character. Without a town-wide Historic Preservation Plan, this historic charm and character remains at risk to degradation over time.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 32. COMMUNITY PRESERVATION FUND – HOUSING PRODUCTION PLAN
(Consent Calendar)

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$36,000 from the Community Housing category of Community Preservation Act Funds, funded from FY22 revenue, for the purpose of supporting and creating community housing, specifically by funding the updated study and design of the Town’s Housing Production Plan, including all costs incidental and related thereto; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Planning and Community Development Department is requesting Community Preservation Act funds to update the Town's Housing Production Plan, in conformance with the State's guidelines, utilizing the 2020 Census information. Sudbury's last Housing Production Plan was written in 2016 and will expire on April 20, 2021. The plan will be developed with the assistance of a consultant.

A Housing Production Plan identifies the housing needs of a community and the goals and strategies it will use to identify and achieve the 10% affordable housing threshold of the MGL Chapter 40B state mandate. A Housing Production Plan enables municipalities to develop a strategy to meet its affordable housing needs, produce housing units in accordance with that plan, and demonstrate progress towards their affordable housing production. By taking a proactive approach in the adoption of a Housing Production Plan, cities and towns are better able to achieve their affordable housing and community planning goals.

While Sudbury is projected to remain over the 10% threshold through 2030, and likely 2040, a Housing Production Plan is still valuable to provide for a community discussion and to update the housing goals in the community. This is very helpful and useful once a community reaches its 10% affordable housing threshold.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 33. COMMUNITY PRESERVATION FUND – HOUSING TRUST ALLOCATION

(Consent Calendar)

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$388,500 from the Community Housing category of Community Preservation Act Funds, funded from FY22 revenue, to the Housing Trust for the acquisition, creation, preservation, and support of community housing as allowed by the Community Preservation Act; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article requests an appropriation to the Housing Trust for the creation of new affordable housing units and continued support for residents struggling to pay their rent due to impacts from COVID or other matters. The Housing Trust last requested Community Preservation Act funds in 2018 for Fiscal Year 2019 and has not created any new units since then, as the Housing Trust relies on Community Preservation Act funds for unit creation.

This funding allocation would assist in creating at least one new unit of affordable housing in the Housing Trust's Home Preservation Program which converts existing smaller market homes to affordable homes and provides affordable homeownership opportunities to income eligible households. The Housing Trust is the main, if not the only, entity with plans to create affordable homeownership in Sudbury. Through its program, the Housing Trust has seen tenants of the Sudbury Housing Authority become owners for their families, and owners of deed restricted properties in Sudbury purchase market rate homes in town. These items demonstrate first-hand the benefits of a homeownership program. Sudbury has had 37 ownership units in its affordable housing portfolio since 2016, with no additional homeownership units in the pipeline. The Home Preservation

Program conforms to the Town’s Housing Production Plan, contributes long-term affordability towards the MGL Chapter 40B 10% affordable housing threshold, converts market rate to affordable units, and promotes a socioeconomic environment that encourages a diversity of income.

Additionally, the Housing Trust aims to build upon its Emergency Rental Assistance Program (ERAP) which serves low income level households in town by providing rental assistance. The Housing Trust has recently successfully implemented and administered the Emergency Rental Assistance Program and looks to expand the concept. This program would have the effect of deepening the affordability of rental units in Sudbury and would serve low income households. The Emergency Rental Assistance Program commits four months of rental assistance for apartments with low income tenants who have demonstrated a loss of income due to COVID. With Community Preservation Act funding, the Housing Trust plans to continue and expand its emergency rental assistance efforts to assist tenants with a recent loss of income. The Emergency Rental Assistance Program conforms to the Town’s Housing Production Plan, assists in intermingling affordable and market rate housing at levels that exceed state requirements for percentage of affordable units, and promotes a socioeconomic environment that encourages a diversity of income.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 34. COMMUNITY PRESERVATION FUND – REGIONAL HOUSING SERVICES OFFICE (RHSO) MEMBERSHIP FEE *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$30,000 from the Community Housing category of Community Preservation Act Funds, funded from FY22 revenue, for the purpose of supporting and creating community housing by funding of the Town’s portion of the FY22 Regional Housing Services Office (RHSO) membership fee which supports the Town’s affordable housing activities; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: In recent years, Sudbury has made great strides towards satisfying the requirements of the State’s Comprehensive Permit Act (Chapter 40B). This Act requires cities and towns to provide certification that the number of dwelling units in the municipality which qualify as “affordable” by statute, meets or exceeds ten percent (10%) of the municipality’s total dwelling units. Falling short of that number, as Sudbury has until recently, allows developers to both site and design partially affordable developments with extreme limitations on the Town’s zoning and design oversights.

There are a great number of administrative requirements to certify additions to this approved inventory and to maintaining those certifications going forward. Sudbury used to provide these services in-house through the Planning and Community Development Department, with funding through Community Preservation Committee administrative funds. In 2011, Sudbury took the lead in the creation of a seven-town shared services effort, both to improve 40B certification operations and to reduce the cost of doing so.

That entity, the Regional Housing Services Office (RHSO), is now more appropriately funded via a separate Community Preservation Act Fund article at Town Meeting, as the work is no longer housed within a Town department and the now nine-member, contractual Intermunicipal Agreement arrangement is expected to continue to be the way the Town handles these responsibilities.

The services provided include affordable housing inventory monitoring; supervising lotteries to determine who qualifies for affordable housing; monitoring the Incentive Senior Developments at Frost Farm and Grouse Hill to ensure compliance with eligibility requirements; monitoring all deed restricted properties; providing valuations for deed restricted properties to the Town Assessor; reviewing compliance with Regulatory Agreements and certification to Department of Housing and Community Development (DHCD) for Local Initiative Program (LIP) rental units; maintaining the affordable housing inventory and providing estimates for 2030 SHI projections; and other administrative work, including annual action plans, 5 year consolidated plans, fair housing reports and programs, and related housing questions which arise during the year.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 35. COMMUNITY PRESERVATION FUND – REVERSION OF FUNDS

(Consent Calendar)

To see if the Town will vote to return the unused balances from prior article authorizations voted at prior Town Meetings, which projects have been completed and for which no liabilities remain outstanding or unpaid, into the Community Preservation Act general account as follows:

2010 ATM, Article 36	CSX Alternative Acquisition Funding	\$420,000.00
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to be returned to the category of Unrestricted Reserves; and

2014 ATM, Article 33	Melone Property Engineering	\$110,639.21
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to be returned to the category of Unrestricted Reserves

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Total: \$530,639.21

;or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: All projects are completed at this time or will not proceed to fruition. In order to return the funds to the Community Preservation Act general account, this article and an affirmative vote of Town Meeting are necessary.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

ARTICLE 36. COMMUNITY PRESERVATION FUND – GENERAL BUDGET AND APPROPRIATIONS

(Consent Calendar)

To see if the Town will vote to appropriate a sum or sums of money from Community Preservation Act funds, as recommended by the Community Preservation Committee, for the FY22 Community Preservation Act budget, including the administrative expenses and all other necessary and proper expenses of the Community Preservation Committee for FY22, amounts for payment of debt service on the Community Preservation Act projects previously approved by Town Meeting, and as may be needed to comply with General Laws Chapter 44B, Section 6, to reserve for future appropriation amounts for open space, including land for recreational use, historic resources and community housing; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This article sets forth the entire FY2022 Community Preservation Act budget, including appropriations and reservations as required in connection with the administration of the Community Preservation Act funds. The estimated annual revenue for FY2022 is \$2,550,000. The article appropriates funds for FY2022 debt service obligations totaling \$1,052,178. These obligations arise from prior Town Meeting approval for the bonding of six projects:

- 1) Purchase of the Dickson property utilizing the Open Space and Recreation (\$29,061) and Historic Resources (\$19,374) categories;
- 2) Purchase of land and development rights as well as construction of a sports field on the Cutting property utilizing the Open Space (\$172,428) and Recreation (\$21,312) categories;
- 3) Purchase of the Libby property utilizing the Open Space and Recreation (\$133,987) category;
- 4) Purchase of development rights on the Nobscot Boy Scout Reservation Phases I and II utilizing the Open Space and Recreation (\$418,234) category;
- 5) Purchase of development rights on Pantry Brook Farm utilizing the Open Space and Recreation (\$182,657) category; and
- 6) Purchase of the Johnson Farm Property utilizing the Open Space and Recreation (\$75,125) category.

The article also appropriates funds for administrative and operational expenses of the Community Preservation Committee in the amount of \$85,000. The administrative fund can be used by the Community Preservation Committee to pay for technical staffing and expertise, consulting services (e.g. land surveys and engineering), property appraisals, legal advertisements, publication fees, and other administrative expenses. By statute, the Community Preservation Committee may budget up to five percent (5%) of its annual budget for these administrative and operational expenses, or \$127,500 based upon the projected FY2022 revenue of \$2,550,000. Any funds remaining in the administrative account at the fiscal year's end revert to the Community Preservation Act Fund Balance, and need to be re-appropriated for administrative use in subsequent years. The Community Preservation Committee believes having access to administrative funds is critically important as it allows the Committee to conduct business on a time-sensitive basis, a vital component of the Community Preservation Act.

The Community Preservation Act requires 10% of the estimated annual income be allocated to current projects or reserved for future expenditures in each of the three core categories: Community Housing, Historic Resources, and Open Space and Recreation. The actual amount reserved each year depends upon whether or not Town Meeting has appropriated money totaling less than 10%, or not appropriated any money at all in any of these three core categories. If there is a balance of unspent Community Preservation Act funds from that fiscal year after such reservations and after Town Meeting has voted the Community Preservation Act articles, it is budgeted in the unrestricted reserve account for future Community Preservation Act projects in all three categories.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

TOWN COUNSEL OPINIONS

It is the opinion of Town Counsel that, if the Zoning Bylaw amendments proposed in the following articles in the Warrant for the 2021 Annual Town Meeting are properly moved, seconded and adopted by a two-thirds vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Zoning Bylaw:

- Article 26 Amend Zoning Bylaw, Article IX, Amend Text of Section 2110. Establishment
 - Article 27 Amend Zoning Bylaw, Article IX, Amend Text of Section 2324 Regarding Trailer or other structures for storage or office purposes
 - Article 28 Amend Zoning Bylaw, Article IX, Amend Text of Section 3200. Signs and Advertising Devices
-

And you are required to serve this Warrant by posting an attested copy thereof at the Town Hall at least seven days before the time appointed for such meeting.

Hereof fail not and make due return of the Warrant by your doing thereon to the Town Clerk, at or before the time of meeting aforesaid.

Given under our hands this 30th day of March, 2021.

SELECT BOARD OF SUDBURY:

Janie W. Dretler

Jennifer S. Roberts

Daniel E. Carty

Charles G. Russo

William J. Schineller

Part II

FINANCE SECTION

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NOTE: This year the Finance Committee began an effort to make financial reporting in the warrant easier to understand. Please send your suggestions to FinCom@Sudbury.Ma.Us

Please use the following link to the Finance Committee section of the Town’s website for additional information:

<https://sudbury.ma.us/financecommittee/>

FY22 Finance Committee Report:

Finance Committee Budget Report

This report, and the pages that follow, are intended to assist residents in understanding Sudbury's fiscal year 2022 ("FY22") budget, from July 1, 2021 to June 30, 2022, and the related financial articles that will be presented to you at Town Meeting. We believe, above all, that the participation of an informed voter is essential to the success of Sudbury's democratic process and continued fiscal health.

The Finance Committee's ("FinCom") mission is to make objective and concise recommendations to Town Meeting on the annual budget and any other finance-related warrant articles. To achieve this mission, the Committee reviews and considers any matter that may have a long- or short-term fiscal impact on the Town and communicates with other Town Boards, the Town Manager, the Finance Director, the Superintendents of SPS and LSRHS, and others as needed for the purpose of gathering relevant and accurate information for evaluation, debate, and the formulation of a recommendation.

FinCom is an independent volunteer body appointed by the Town Moderator. The numbers contained in this document are based on FinCom's or Finance Director's calculations as of March 22, 2021, and in some cases are approximations to explain the budget concisely. Please refer to the actual warrant articles which will be voted for exact amounts.

Budget Summary and Recommendation

There are three cost centers that make up the Operating Budget (Article 3): Sudbury Public Schools; Lincoln-Sudbury Regional High School; and the Town Departments. Additional items in the Operating Budget include: The Town's debt service, contributions to the OPEB (other post-employment benefits) Trust Fund for the Town and SPS, and employee benefits for the Town Departments and SPS. The budget for Article 3 of the Warrant is \$107,093,084.

The Finance Committee's deliberation process was thorough, spanning 22 meetings, multiple budget hearings and presentations, and 217 documented questions and responses.

FinCom voted 8-0 to recommend approval of the FY22 budget, representing an increase of 1.40% over FY21 and fitting within the no-override limits of Proposition 2 ½.

- SPS' budget increased 2.58% YoY, to \$40,630,742
- Sudbury's share of the LSRHS budget increased 2.31% YoY, to \$27,330,369
- The Town Departments' operating budget increased 0.89% YoY, to \$21,868,304

FinCom’s budget analysis focused on understanding the year over year changes, including deeper analysis on line items with significant changes. In addition, FinCom worked collaboratively with the above-mentioned cost centers to analyze and seek feedback on line items generating budget pressure during both the present and future budget years. FinCom has highlighted key changes to the budgets in the following sections.

Budget for Town Departments

The Town of Sudbury’s operating budget for Town Departments will increase \$193,426, a modest 0.89% increase over FY21.

Item	YoY Change (\$)	YoY Change (%)
Education -- Vocational	\$15,400	2.8%
General Government	\$71,849	2.26%
Public Safety	\$193,437	2.10%
Public Works	\$91,712	1.64%
Human Services	\$37,953	4.05%
Culture and Recreation	(\$11,542)	-0.76%
Town-Wide Operating and Transfers	(\$205,383)	-29.92%
TOTAL INCREASE	\$193,426	0.89%

Cost of Living Adjustments (COLA) are increases for union employees detailed in three-year collective bargaining contracts. Current contracts end in FY21, and the COLA for FY22 has not yet been determined. In addition to salaries, the Town also pays health benefits, which can vary from year to year. The Town is currently covered by the Group Insurance Commission, which is a statewide insurance program for state and local employees.

FinCom appreciates the thoughtful effort from the Town administration and departments to provide a non-override budget, noting the following strengths:

- Carrying excess levy capacity to reduce taxpayer burden during uncertain times
- Establishing improved capital planning and financial policies as the Select Board’s top goal for this year
- Absorbing costs related to previously added fire personnel into the budget, following the phased reduction of \$90,000 in funds from the SAFER grant
- Adding OPEB contribution back into the levy. It was mostly funded by free cash in FY21 to provide additional tax relief due to COVID-19 uncertainties
- Long-term capital planning by the Department of Public Works proactively anticipating needs

- Successful management of the FY22 budget process by the Town Manager and Finance Department, given many unpredictable challenges from an extended FY21 budget process due to COVID-19

FinCom notes the following areas of concern:

- Significant need for improved 5 and 15-year capital planning related to policies, documentation of maintenance and replacement costs, updated asset inventories, and communication across all departments and cost centers
- FY22 COLA costs are not known as the contracts are not yet settled
- Significant portion of the Town Manager's capital budget is still being funded by free cash, rather than being funded within the levy. This is meant to be a short-term change to provide relief to taxpayers due to COVID-19
- Potential unplanned COVID-19 expenses might not be covered by State and Federal funding
- Significant need for improved financial management policies
- Need for FTEs as well as budgeted dollars to be reported in order to see year over year changes

Due to pressures associated with an accelerated timeline and in part to somewhat unpredictable COVID-19 impacts, the overall budget process was compressed. This required FinCom adding more meetings to fully conclude our FY22 budget and Warrant Articles assessment.

Sudbury Public Schools Budget

The Sudbury Public Schools (SPS) budget represents an increase of 2.58%, or approximately \$1,022,000. FinCom observed a strong budgeting effort from SPS for FY22, especially in the following areas:

- Adopting a proactive approach to support students with needs related to educational progression due to COVID-19, through its proposed SMILE program and other investments
- Restoring three custodians to the budget to support short and long-term needs
- Successfully meeting the increased needs of students by adding curriculum in number theory, aligning algebra sections to guidance, and increasing student services where necessary

In addition to awaiting final numbers from the pending contract negotiation with the teachers' union and COLA increases, FinCom has identified a few areas of concern for the SPS budget, such as

- Evaluation of the need for additional reporting on the use of circuit breaker funds to understand the impact on the SPS budget
- Potential for unplanned COVID-19 expenses not being covered by State and Federal funding, e.g., pool testing
- Continued need for better capital planning within SPS, along with improved coordination with the Town pertaining to the long-term capital plan
- Need for FTEs as well as budgeted dollars to be reported in order to see year over year changes

Lincoln Sudbury Regional High School Budget

The LSRHS assessment to Sudbury increased 2.31% for FY22, or approximately \$618,000. This reflects a reduction in the percentage of LSRHS' budget that is assessed to Sudbury as compared to the prior year. For FY22, LSRHS was able to negotiate a one-year agreement with its teachers' union for a 0% COLA. In addition, LSRHS provides health insurance benefits to its employees separately from the Town and SPS. LSRHS and its union agreed on a new health benefits plan that resulted in an FY22 5.8% reduction in health care costs.

FinCom sees positives from the LS budgeting effort for FY22, especially in the following areas:

- Managing COVID-related expenses utilizing State and Federal grants
- Absorbing a large unexpected increase in out of district (OOD) costs while expanding Mandarin language and Computer Science offerings
- Improving student services while substantially reducing OOD costs with LS Academy
- Negotiating a 1-year contract extension with staff for 0% Cost of Living Adjustment (COLA) for FY22
- Renegotiating health benefits with approval of teachers to substantially reduce costs, amounting to savings of 5.8% YoY
- Demonstrating strong capital planning and management

FinCom has also identified a few areas of concern within the LS budget, including

- Potential need to resort to further use of Excess and Deficiency (E&D) Funds to manage OOD costs in the current budget year. E&D funds are the equivalent of free cash for the high school and these funds should not typically be used for operational expenses. LSRHS has been proactive in managing this situation.
- Potentially diminished circuit breaker carryover which could create an issue in FY22, if there are insufficient funds to manage unexpected OOD costs
- Potential for unplanned COVID-19 expenses not being covered by State and Federal funding, e.g., pool testing
- Maintaining or increasing OPEB contributions in the future
- Potentially putting pressure on FY 23 budget having used many of the levers available to close the budget gap this year
- Need for FTEs as well as budgeted dollars to be reported in order to see year over year changes

In addition, some members of the FinCom believe a review of the regional agreement between Sudbury and Lincoln should be prioritized.

Other impacts to the Town Operating Budget

OPEB

Currently, the Town and SPS pay health care benefits to retirees on a pay-as-you-go basis. Taking all current and future retirees from the Town and SPS and estimating the amount of benefits to be covered over their lifetime yields a future obligation of approximately \$91,748,227. Trust Fund assets are \$8,555,842, making the net accrued liability \$83,192,385.

Ideally, the Town mitigates this liability by putting aside some amount of money each year to cover the current employees' post-employment benefits. Sudbury had continued to make progress towards this by increasing the OPEB contribution each year for both the Town and SPS.

In FY21 due to COVID-19 impact to the overall budget, the OPEB contribution for the Town and SPS was reduced to \$468,382 and funded by free cash. In FY22 the OPEB contribution has been returned to \$625,000, well within the Town's target funding range, and is once again being funded inside the levy.

Benefits

The cost of benefits for Town and SPS staff increased \$533,895 (3.9%) over the prior year.

Debt Service

The debt service decreased by \$1,043,207; however, \$1,605,767 of the FY21 debt service was funded with an MSBA (Massachusetts School Building Authority) reimbursement. MSBA reimbursement stopped after FY21; therefore, continuing debt service funded by real estate taxes in FY22 has increased by \$562,560.

Capital

Capital spending in the Town supports everything from DPW equipment to refrigeration units, IT equipment, Town facilities, and buildings. There are several sources of funding for capital. Capital is presented in several different segments including the Town Manager's Capital Budget (Article 4) as well as individual warrant articles for capital projects exceeding \$100,000, predominantly submitted by DPW and CPC.

In April of 2020, the Division of Local Services (DLS) conducted a review of Sudbury's Capital Improvement Program and compared it to what it considers to be best practices. As part of this review, DLS recommended significant improvements to ensure Sudbury's capital assets can cost effectively sustain the Town's desired service levels into the future. FinCom is eager to see progress towards this end.

Town Manager Capital Budget

For FY22, the Town Manager has a list of capital improvement items that total \$1,102,180. This year, in consideration of the COVID-19 impact from the prior fiscal year and to avoid placing additional burden on Sudbury taxpayers, the Town is proposing to cover \$900K of capital spending from free cash within this budget and only fund the remaining \$202,180 through the tax levy. FinCom would like to see increased progress towards funding more capital within the levy in the future.

Capital Funding Sources

Tax Levy

Typically, the tax levy is the funding source for the Town Manager's Capital Budget, as well as limited debt service. In FY21 and FY22 the Town Manager's Capital Budget is being funded mostly by free cash to mitigate tax increases in light of COVID-19. The hope is to return the Town Manager's Capital Budget to being supported by the levy as soon as possible.

Free Cash

Free Cash is the unencumbered fund balance in the General Fund at the end of a fiscal year. This money is often due to expenses being less than appropriations for a particular budget item, or revenue exceeding expectation. Free cash is normal and healthy in a properly administered Town budget. One of the recommended uses of free cash is asset purchases. Free cash is also used to maintain the level of the Town's stabilization fund at 5% of the operating budget.

The free cash available as certified by the Commonwealth of Massachusetts as of 7/1/2020 was \$4,249,754. FinCom does not establish funding sources in the budget but will opine on the appropriateness of those sources. FinCom agrees with the Town's proposal for FY22 to spend \$2,827,500 on the Town Manager's Capital Budget and additional capital articles.

Capital Exclusion

In addition to using free cash to pay for capital items, Town Meeting may also vote to use a capital outlay expenditure exclusion (capital exclusion) to raise taxes for one year, above the proposition 2 ½ limit, to purchase a major capital item. This capital exclusion must be affirmed by a majority of voters at a town election. There are no capital exclusions for Town Meeting.

Debt Exclusion

Town Meeting may also vote to authorize a debt exclusion to raise taxes above the proposition 2 ½ limit for a multi-year project. This debt exclusion must also be approved by a majority vote at a town election.

As of the writing of this report to the Town for the Warrant, the only debt exclusion we expect may be proposed for Town Meeting is the funding decision on Construction of Housing/Living Addition at Fire Station #2 (Article 16).

CPC Spending

The final source of funding involves articles presented by the Community Preservation Committee (CPC), which is charged with administering the Town's CPA funds and allocating them to fund projects meeting statutory criteria. The Town's CPA funds are the result of a tax surcharge residents pay of 3% above and beyond the levy, and a portion of matching funds from the State which vary from year to year. Articles for these projects may not be amended at Town Meeting. For FY21, final state match has increased from the prior year to 31.4%. Each year, at least 10% of CPA funds must be spent or set aside for each of the following categories: open space and recreation, community housing, and historic preservation, and 5% is allowable for administrative costs.

The CPC can spend available cash it has on hand or it can raise debt, both with the approval of Town Meeting. The amount of debt the CPC can raise is limited by cash flow coming into the fund each year from the Town once current annual debt service is covered.

The CPC is projected to collect an estimated \$2.55M in FY22 from tax revenues. Of this, \$127,500 can be spent on administration. After paying current debt service of \$1,093,035, for past purchases such as Cutting and Dickson, Libby, Nobscot, Pantry Brook and Johnson Farm, this leaves about \$1.33M for new projects, including Feeley Field Improvements (Phase I, FY22) and Smile Playground Improvements. (FinCom's recommendation to support Feeley Field Improvements (Phase I, FY22) does not reflect an opinion on Phase II of the proposed project, as that design is not yet complete, and costs are not fully estimated.)

Sudbury is projected to have a CPA fund cash balance of approximately \$6.23M as of 6/30/21.

Your Property Tax Bill

Under the non-override FY22 budget proposed by the Town and its cost centers, the estimated tax increases for an average residential property in Sudbury (assessed at \$745,255 as of FY21) would consist of

- \$327, attributed to the FY22 operating budget increase.
- \$69, attributed to debt exclusion increase.
- \$31, attributed to the FY22 capital budget increase.

The overall property tax increase for the average residential property is projected to be \$427 or 3.04% YoY for an average residential property in Sudbury, from \$14,033 in FY21 to \$14,460 in FY22. These increases do not account for the CPA 3% surcharge, or future bonding costs related to recently approved debt exclusions such as for the Fairbank Community Center, which will be bonded in future years. In addition, they do not account for any potential Debt Exclusion for the Fire Station #2 project (Article 16), because the funding source proposal has not been proposed as of the writing of this report.

Conclusion

The Town is in good financial condition in terms of our ability to fully fund the operation of the Town and Schools and maintain our AAA bond rating. We continue to grapple with both the direct and indirect impacts of COVID-19. The Finance Committee believes that implementing best practices related to our Capital Improvement Plan and updating financial policies, consistent with the recommendations of the Division of Local Services, should be a high priority for the Town. The Town does have high taxes, high dependency on residential taxes, and

consistent growth in taxes. We seek to provide information in this Warrant to help taxpayers understand relevant issues so we can make informed choices going forward.

The FinCom expended substantial effort this year to onboard and train new members, updated our rules and operating procedures, clarified and documented ownership of the budget process, and began revamping and simplifying the Finance Section of the Warrant. We made a lot of progress this year, and our work will continue to ensure we provide Town Meeting with an understanding of the budgetary risks and challenges. Continued progress is only possible through collaboration with the Town Manager, Finance Department, and Select Board, and we are thankful for their service and the strides made this year.

Respectfully submitted,

Susan Berry

Ron Brumback

Blair Caple

Howard Feng

Michael Joachim

Jean Nam

Eric Poch (Co-Chair)

Sonny Parente

Scott Smigler (Co-Chair)

FY22 Town Meeting Warrant Data Summary:

FY21 MONIED ARTICLES WITH FINANCE COMMITTEE RECOMMENDATIONS

<u>Article</u>	<u>Description</u>	<u>Requested Amount</u>	<u>Finance Committee Recommendation</u>
3	FY22 Budget	\$ 107,093,804	Approval
4	FY22 Capital Budget	\$ 1,102,180	Approval
5	FY22 Transfer Station Enterprise Fund Budget	\$ 309,103	Approval
6	FY22 Pool Enterprise Fund Budget	\$ 464,136	Approval
7	FY22 Recreation Field Maintenance Enterprise Fund Budget	\$ 230,786	Approval
8	FY22 Snow & Ice Transfer	TBD	Report at Town Meeting
9	Unpaid Bills	TBD	Report at Town Meeting
10	Chapter 90 Highway Funding (Consent Calendar)	N/A	Approval
11	Stabilization Fund	\$ 281,268	Approval
12	FY22 Revolving Fund Spending Limits (Consent Calendar)	N/A	Approval
14	Fund Litigation Costs - Eversource	\$ 150,000	Approval
16	Construction of Housing/Living Addition - Fire Station #2	\$ 4,300,000	Approval
17	Marlboro Road Culvert Replacement	\$ 400,000	Approval
18	Front End Loader with Plow	\$ 230,000	Approval
19	Multi-purpose Sidewalk Tractor	\$ 205,000	Approval
20	Six-wheel Combo Dump Truck with Plow and Wing	\$ 285,000	Approval
22	Means Tested Senior Tax Exemption Extension	N/A	Approval
23	Sudbury Public Schools COVID-19 Academic Program	\$ 309,540	Approval
24	Sudbury Public Schools Peter Noyes School Fire Alarm Replacement	\$ 220,000	Approval
25	LSRHS Stadium Field	\$ 337,500	Approval
29	Community Preservation Fund - Dr. Bill Adelson Playground Improvements	\$ 285,000	Approval
30	Community Preservation Fund - Frank Feeley Fields Improvements	\$ 386,000	Approval
31	Community Preservation Fund - Historic Preservation Plan	\$ 32,000	Approval
32	Community Preservation Fund - Housing Production Plan	\$ 36,000	Approval
33	Community Preservation Fund - Housing Trust Allocation	\$ 388,500	Approval
34	Community Preservation Fund - Regional Housing Services Office (RHSO) membership fee	\$ 30,000	Approval
35	Community Preservation Fund - Reversion of Funds	N/A	Approval
36	Community Preservation Fund - General Budget and Appropriations	\$ 1,137,178	Approval

ESTIMATED IMPACT ON FY22 RESIDENTIAL TAX BILL

ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2022 TAX BILL					
				FY21 Average Property Value	
Property Value	100,000	300,000	500,000	745,255	1,000,000
FY21 Residential Tax Bill	1,883	5,649	9,415	14,033	18,830
FY22 Articles - Estimated Tax Impact:					
3 FY22 Budget:					
Operating Budget	44	132	219	327	439
Debt Exclusions	9	28	47	69	93
4 FY22 Capital Budget	4	12	21	31	41
FY22 Estimated Residential Tax Bill	1,940	5,821	9,702	14,460	19,403
FY22 Estimated Increase (%)	3.04%	3.04%	3.04%	3.04%	3.04%
THESE AMOUNTS ARE ESTIMATES AND MAY NOT CORRESPOND WITH THE FINAL FY22 TAX BILLS.					

Notes:

This chart shows the estimated tax impact of Town Meeting Articles in FY22. The columns shown above represent the FY21 average home value along with other valuations for reference.

This chart pertains to articles for which approval is sought at Town Meeting to raise required funds via tax levy.

To calculate the estimated tax bill for any specific residence, divide the assessed value of the residence by 100,000 and multiply that ratio by the tax impact in the column for \$100,000 residence value.

VALUE OF FREE CASH ARTICLES

VALUE OF TOWN MEETING ARTICLES IN RELATION TO FY21 TAX BILL (FREE CASH SPENDING - NO FY22 TAX IMPACT)							
Article	Amount	Property Value (FY21 Average Property Value is \$745,255)					
		100,000	300,000	500,000	745,255	1,000,000	
4	FY22 Capital Budget	900,000	18.00	54.00	90.00	134.15	180.00
11	Stabilization Fund	281,268	5.63	16.88	28.13	41.92	56.25
14	Fund Litigation Costs - Eversource	150,000	3.00	9.00	15.00	22.36	30.00
16	Construction of Housing/Living Addition - Fire Station #2	500,000	10.00	30.00	50.00	74.53	100.00
17	Marlboro Road Culvert Replacement	400,000	8.00	24.00	40.00	59.62	80.00
18	Front End Loader with Plow	230,000	4.60	13.80	23.00	34.28	46.00
19	Multi-purpose Sidewalk Tractor	205,000	4.10	12.30	20.50	30.56	41.00
20	Six-wheel Combo Dump Truck with Plow and Wing	285,000	5.70	17.10	28.50	42.48	57.00
23	SPS COVID-19 Academic Program	309,540	6.19	18.57	30.95	46.14	61.91
24	SPS Peter Noyes School Fire Alarm Replacement	220,000	4.40	13.20	22.00	32.79	44.00
25	LSRHS Stadium Field	337,500	6.75	20.25	33.75	50.30	67.50
Total		3,818,308	76.37	229.10	381.83	569.12	763.66

Notes:

This chart shows the value of the Town Meeting articles that are funded with Free Cash. These articles have **NO** impact on FY22 residential tax bills.

The values are presented in relation to the FY21 residential real estate tax bills. The amounts represent the estimated amount by which the FY22 residential tax bill would increase if not funded from Free Cash.

HOW THE RESIDENTIAL TAX RATE IS CALCULATED

The property tax levy is the revenue a community can raise through real and personal property taxes. Property tax is an assessment on the ownership of real and personal property. An owner's property tax is based on the Town's assessment, which is the full and fair cash value of the property.

Proposition 2 ½ places constraints on the amount of the levy raised by a city or town and on how much the levy can be increased from year to year. A levy limit is a restriction on the amount of property taxes a community can levy. A levy limit for each community is calculated annually by the Department of Revenue. It is important to note that a community's levy limit is based on the previous year's levy limit and not on the previous year's actual levy.

Each year, a community's levy limit automatically increases by 2.5 percent over the previous year's levy limit. This does not require any action on the part of local officials; the Department of Revenue calculates this increase automatically. Additionally, a community is able to increase its levy limit each year to reflect new growth in the tax base. Assessors are required to submit information on growth in the tax base for approval by the Department of Revenue as part of the tax rate setting process.

A community can temporarily or permanently increase the levy limit by approving debt exclusions, capital exclusions, and overrides. Debt exclusions raise the levy limit for the life of the bonds that are issued, capital exclusions raise the levy limit one time, and overrides permanently increase the levy limit.

The Tax Rate is calculated by dividing the total levy to be raised (annual property taxes) by the total value of the property assessment, multiplied by 1,000. Property taxes are determined by dividing the value of a home by 1,000 and multiplying by the tax rate. The following shows a sample calculation:

Tax Rate Calculation

Real Estate Taxes to Be Raised	86,413,113
Assessed Value (Town-Wide)	4,453,526,306
Tax Levy/Assessed Value	<u>0.019403301</u>
Tax Rate	19.40

Individual Tax Calculation

Home Value	745,255.00
Home Value/1,000	745.26
Property Tax	<u>14,460.41</u>

GENERAL FUND BUDGET SUMMARY OF REVENUES & EXPENDITURES

EXPENDITURES	FY20 Actual	FY21 Budgeted	FY22 Recommended
Education - Sudbury Public Schools (SPS)	38,364,566	39,608,834	40,630,742
Education - LS Regional High School (LS)	25,808,881	26,712,280	27,330,369
Education - Vocational	629,668	550,000	565,400
General Government	3,228,969	3,177,614	3,249,463
Public Safety	8,686,874	9,199,461	9,392,898
Public Works	5,450,692	5,607,520	5,699,232
Human Services	850,626	937,995	975,948
Culture & Recreation	1,316,577	1,515,936	1,504,394
Town-Wide Operating and Transfers	164,274	686,352	480,969
Total Town Departments	84,501,127	87,995,992	89,829,415
Town Debt Service	3,090,425	3,476,446	2,433,239
Employee Benefits (Town and SPS)	12,532,657	13,672,255	14,206,150
OPEB Trust Contribution (Town and SPS)	610,249	468,382	625,000
Total Operating Budget	100,734,458	105,613,075	107,093,804
Capital Expenditures	1,689,567	722,076	1,102,180
TOTAL EXPENDITURES:	102,424,025	106,335,151	108,195,984

REVENUES & AVAILABLE FUNDS	FY20 Actual	FY21 Budgeted	FY22 Recommended
Real Estate and Personal Property Taxes	88,969,947	91,936,403	95,534,495
State Aid	6,367,520	6,346,193	6,411,489
MSBA Reimbursement	1,605,767	1,605,767	-
FEMA Grant	429,755	-	-
SAFER Grant	180,917	180,000	90,000
Local Receipts	5,915,987	4,216,330	4,600,000
Other Available	762,174	660,000	660,000
Free Cash	-	1,390,458	900,000
TOTAL REVENUES & AVAILABLE FUNDS:	104,232,067	106,335,151	108,195,984

See additional budget details in the Town Manager's Proposed Budget which can be found on the Town's website at the following link:

<https://sudbury.ma.us/financecommittee/3-5-21-fy22-sudbury-town-manager-proposed-budget-fincom/>

TOWN MANAGER'S CAPITAL BUDGET

Project Name	Department	Cost	Suggested Funding
Various Building Improvements	Facilities	\$ 75,000	Free Cash/Tax Levy*
Radio Receivers	Police	\$ 30,000	Free Cash/Tax Levy*
Pick Up Truck with Plow - Unit 2	DPW	\$ 70,000	Free Cash/Tax Levy*
Pickup Truck (Fire Dept.) Engine 8	Fire	\$ 55,000	Free Cash/Tax Levy*
Loring School Playground Access Walkway	SPS	\$ 78,000	Free Cash/Tax Levy*
Dump Truck With Plow - Unit 29	DPW	\$ 95,000	Free Cash/Tax Levy*
Fire Department Service Truck	Fire	\$ 55,000	Free Cash/Tax Levy*
Half Ton Pickup Truck	Facilities	\$ 28,309	Free Cash/Tax Levy*
Van	Facilities	\$ 40,144	Free Cash/Tax Levy*
Fire Alarm Monitoring System (Vision 21)	Fire	\$ 91,000	Free Cash/Tax Levy*
Tennis Court Repair and Resurfacing	LSRHS	\$ 39,410	Free Cash/Tax Levy*
Curtis Boiler #3 Replacement	SPS/Facilities	\$ 80,000	Free Cash/Tax Levy*
Car 3 (Fire Dept.)	Fire	\$ 55,000	Free Cash/Tax Levy*
Paging, Clocks, and Bell Systems	SPS	\$ 25,000	Free Cash/Tax Levy*
Aerila Fork Lift (currently 2004)	LSRHS	\$ 35,907	Free Cash/Tax Levy*
Loring Hot Water Heating Main Circulating Pump Replacement	SPS/Facilities	\$ 25,000	Free Cash/Tax Levy*
2012 Chevrolet Express Van-15 Passenger	LSRHS	\$ 39,410	Free Cash/Tax Levy*
Kitchen Equipment Replacement.	SPS	\$ 45,000	Free Cash/Tax Levy*
Document Scanning	Info Systems	\$ 50,000	Free Cash/Tax Levy*
Demolition of 3 Sheds at Broadacres Farm	Facilities	\$ 40,000	Free Cash/Tax Levy*
Town-wide Walkway Design/Construction Improvements	DPW	\$ 50,000	Free Cash/Tax Levy*
Town Manager's Capital Operating Budget		\$ 1,102,180	
Replace Stadium Field Turf (Town Partnership)	LSRHS	\$ 337,500	Free Cash
Noyes Fire Alarm System Replacement	SPS/Facilities	\$ 220,000	Free Cash
6-Wheel 26,000+ GVW Combo Body Dump Truck w/Plow and Spread	DPW	\$ 285,000	Free Cash
Multi-purpose Sidewalk Tractor unit # 53	DPW	\$ 205,000	Free Cash
2004 Volvo L90E Loader unit 48	DPW	\$ 230,000	Free Cash
Marlboro Road Culvert Replacement (Construction)	DPW	\$ 400,000	Free Cash
Capital Additions in Excess of \$100,000		\$ 1,677,500	
Total FY22 Capital Plan		\$ 2,779,680	

* \$900,000 of Free Cash is proposed to fund a portion of the Town Manager's Capital Operating Budget. The balance of \$202,180 will be raised in the Tax Levy.

See additional budget details in the Town Manager's Proposed Budget which can be found on the Town's website at the following link:

<https://sudbury.ma.us/financecommittee/3-5-21-fy22-sudbury-town-manager-proposed-budget-fincom/>

ENTERPRISE FUNDS BUDGETS

EXPENDITURES	FY20	FY21	FY22
	Actual	Budgeted	Recommended
<u>Direct</u>			
Transfer Station	276,294	297,764	291,303
Atkinson Pool	362,090	427,421	438,753
Recreation Field Maintenance	123,863	230,435	205,403
Total Direct Expenditures	762,247	955,620	935,459
<u>Indirect</u>			
Transfer Station	17,214	17,163	17,800
Atkinson Pool	18,956	36,828	25,383
Recreation Field Maintenance	23,198	24,269	25,383
Total Indirect Expenditures	59,368	78,260	68,566
TOTAL:	821,615	1,033,880	1,004,025

RECEIPTS & RESERVES	FY20	FY21	FY22
	Actual	Budgeted	Recommended
Transfer Station	248,340	314,927	309,103
Atkinson Pool	303,046	541,644	464,136
Recreation Field Maintenance	86,539	274,395	230,786
TOTAL:	637,925	1,130,966	1,004,025

See additional budget details in the Town Manager's Proposed Budget which can be found on the Town's website at the following link:

<https://sudbury.ma.us/financecommittee/3-5-21-fy22-sudbury-town-manager-proposed-budget-fincom/>

CPA FUNDS BUDGET

	FY20 Actual	FY21 Appropriated	FY22 Recommended
Beginning CPA Fund Balance	4,733,401	5,652,903	6,224,893
<u>Revenues</u>			
CPA Surcharge & Fees	2,089,301	2,000,000	2,000,000
Intergovernmental	525,058	570,000	500,000
Investment Income	76,173	20,000	50,000
Total Revenues	<u>2,690,532</u>	<u>2,590,000</u>	<u>2,550,000</u>
<u>Expenditures</u>			
Debt Service	1,140,210	1,111,410	1,052,178
Administrative	16,635	85,000	85,000
Other	614,185	821,600	1,157,500
Total Expenditures	<u>1,771,030</u>	<u>2,018,010</u>	<u>2,294,678</u>
Excess / (Deficiency)	919,502	571,990	255,322
Ending CPA Fund Balance	<u>5,652,903</u>	<u>6,224,893</u>	<u>6,480,215</u>
	FY20 Actual	FY21 Appropriated	FY22 Recommended
<u>ENDING FUND BALANCE</u>			
Projects (in-use)	1,812,304	1,765,971	1,235,332
Unassigned	3,840,599	4,458,922	5,244,883
	<u>5,652,903</u>	<u>6,224,893</u>	<u>6,480,215</u>

LONG-TERM DEBT BY PROJECT

	Current Long-Term Debt (issued prior to 4/1/2021)										Estimated Future Debt	
	Noyes Green Repair	Nixon Roof and Other	ESCO Loan	Police Station	Johnson Farm	Broadacres	DPW Fuel Island	Stearns Mill Dam	Camp Sewataro	Total	Projects Approved Prior to 4/1/2021*	Projected Total Annual Debt Service
Principal Balance as of 6/30/2021	155,000	290,000	708,613	4,905,000	1,190,000	3,465,000	1,345,000	685,000	11,065,000	23,808,613		
Remaining Debt Service as of 6/30/2021	156,744	314,634	806,500	6,079,606	1,477,619	4,133,206	1,563,149	765,763	13,352,649	28,649,870		
Payment 2022	156,744	95,784	76,900	531,388	127,713	256,431	179,449	166,563	787,201	2,378,172	106,350	2,484,522
Payment 2023	-	92,450	80,000	513,638	123,463	251,998	175,450	161,800	777,362	2,176,160	201,660	2,377,820
Payment 2024	-	84,400	83,000	495,888	119,213	244,997	170,050	151,200	760,363	2,109,110	1,670,111	3,779,221
Payment 2025	-	42,000	86,000	478,138	114,963	237,998	164,650	145,800	743,362	2,012,910	1,667,575	3,680,485
Payment 2026	-	-	89,200	460,388	110,713	230,997	159,250	140,400	731,763	1,922,710	1,665,039	3,587,749
Payment 2027	-	-	92,600	449,738	108,163	223,998	153,850	-	720,162	1,748,510	1,662,504	3,411,014
Payment 2028	-	-	96,000	439,088	105,613	216,997	148,450	-	703,563	1,709,710	1,659,968	3,369,678
Payment 2029	-	-	99,600	433,438	103,063	209,998	143,050	-	687,062	1,676,210	1,657,432	3,333,642
Payment 2030	-	-	103,200	422,638	100,513	202,997	137,650	-	675,763	1,642,760	1,654,896	3,297,656
Payment 2031	-	-	-	411,838	97,963	201,248	131,300	-	664,912	1,507,260	1,652,360	3,159,620
Payment 2032	-	-	-	376,038	95,413	199,497	-	-	654,063	1,325,010	1,649,824	2,974,834
Payment 2033	-	-	-	365,988	92,863	197,398	-	-	645,590	1,301,838	1,565,238	2,867,076
Payment 2034	-	-	-	355,938	90,313	195,297	-	-	636,582	1,278,129	1,564,138	2,842,267
Payment 2035	-	-	-	345,469	87,656	187,935	-	-	627,017	1,248,077	1,563,038	2,811,115
Payment 2036	-	-	-	-	-	185,640	-	-	616,918	802,558	1,561,938	2,364,496
Payment 2037	-	-	-	-	-	183,090	-	-	606,260	789,350	1,560,837	2,350,187
Payment 2038	-	-	-	-	-	180,540	-	-	595,335	775,875	1,559,738	2,335,613
Payment 2039	-	-	-	-	-	177,990	-	-	584,410	762,400	1,558,638	2,321,038
Payment 2040	-	-	-	-	-	175,440	-	-	573,218	748,658	1,557,538	2,306,196
Payment 2041	-	-	-	-	-	172,720	-	-	561,742	734,462	1,556,438	2,290,900
Payment 2042	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2043	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2044	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2045	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2046	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2047	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2048	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2049	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2050	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2051	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2052	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987
Payment 2052	-	-	-	-	-	-	-	-	-	-	1,470,987	1,470,987

Notes:

The “Projects Approved Prior to 4/1/2021” column represents the estimated future debt service for all debt projects that have been approved prior to 4/1/2021, but the long-term debt has not yet been issued.

The projects that have been approved but not issued include the Fairbank Community Center (\$28.8 million), the Dutton Road Bridge (\$1.1 million), the CSX Rail Acquisition (\$820,500), and Sewer SRF Loans (\$500,000).

LS Regional High School Outstanding Debt

	Total	Annual Debt Service	Principal Remaining
FY21 Principal Balance			2,505,000
FY22 Principal	515,000		
FY22 Interest	67,425	582,425	1,990,000
FY23 Principal	510,000		
FY23 Interest	52,050	562,050	1,480,000
FY24 Principal	500,000		
FY24 Interest	36,900	536,900	980,000
FY25 Principal	495,000		
FY25 Interest	21,975	516,975	485,000
FY26 Principal	485,000		
FY26 Interest	7,275	492,275	-
Remaining Debt Service	3,922,275	3,922,275	

NOTE: All of LSRHS' long-term debt is for construction of the high school.

Community Preservation Outstanding Debt by Project

Issues	Nobscot I & II	Cutting/ Dickson	Libby	Pantry Brook	Johnson Farm	Total	Annual Debt Service	Principal Balance
FY21 Principal Balance	2,820,000	665,000	480,000	2,140,000	700,000			6,805,000
FY22 Principal	335,000	230,000	125,000	140,000	50,000	880,000		
FY22 Interest	83,234	12,175	8,988	42,657	25,125	172,178	1,052,178	5,925,000
FY23 Principal	330,000	220,000	120,000	150,000	50,000	870,000		
FY23 Interest	73,275	8,150	6,800	37,043	22,625	147,893	1,017,893	5,055,000
FY24 Principal	330,000	215,000	120,000	150,000	50,000	865,000		
FY24 Interest	62,475	4,300	4,700	34,043	20,125	125,643	990,643	4,190,000
FY25 Principal	330,000	-	115,000	155,000	50,000	650,000		
FY25 Interest	49,275	-	2,300	30,993	17,625	100,193	750,193	3,540,000
FY26 Principal	340,000	-	-	160,000	50,000	550,000		
FY26 Interest	35,975	-	-	27,843	15,125	78,943	628,943	2,990,000
FY27 Principal	330,000	-	-	160,000	50,000	540,000		
FY27 Interest	24,875	-	-	24,643	13,625	63,143	603,143	2,450,000
FY28 Principal	325,000	-	-	165,000	50,000	540,000		
FY28 Interest	16,525	-	-	21,393	12,125	50,043	590,043	1,910,000
FY29 Principal	320,000	-	-	170,000	50,000	540,000		
FY29 Interest	7,988	-	-	18,043	10,625	36,655	576,655	1,370,000
FY30 Principal	90,000	-	-	170,000	50,000	310,000		
FY30 Interest	1,800	-	-	14,643	9,125	25,568	335,568	1,060,000
FY31 Principal	90,000	-	-	175,000	50,000	315,000		
FY31 Interest	900	-	-	11,193	7,625	19,718	334,718	745,000
FY32 Principal	-	-	-	180,000	50,000	230,000		
FY32 Interest	-	-	-	7,643	6,125	13,768	243,768	515,000
FY33 Principal	-	-	-	180,000	50,000	230,000		
FY33 Interest	-	-	-	4,448	4,625	9,073	239,073	285,000
FY34 Principal	-	-	-	185,000	50,000	235,000		
FY34 Interest	-	-	-	1,526	3,125	4,651	239,651	50,000
FY35 Principal	-	-	-	-	50,000	50,000		
FY35 Interest	-	-	-	-	1,563	1,563	51,563	-
Remaining Debt Service	4,066,546	1,200,825	782,113	2,829,226	1,026,938	9,905,647	9,905,647	

Historical Context:

REVENUE BY SOURCE (FY2012 – FY2022)

Fiscal Year	Tax Levy	State Aid	Local Receipts	All Other	Enterprise & CPA Funds	Total Revenue
2012	69,007,532	7,091,024	3,657,000	587,892	3,800,380	84,143,828
2013	71,026,410	7,297,881	3,803,864	776,564	7,543,980	90,448,699
2014	72,951,707	7,409,491	4,420,000	2,913,796	3,451,854	91,146,848
2015	73,549,580	7,564,619	4,777,000	2,568,472	3,343,882	91,803,553
2016	76,997,530	7,541,780	4,787,000	8,181,145	3,278,774	100,786,229
2017	79,892,487	7,777,348	4,545,000	1,810,337	3,352,567	97,377,739
2018	83,323,444	8,001,490	4,625,001	4,102,709	3,478,742	103,531,386
2019	86,384,635	8,061,320	4,836,800	2,718,203	5,075,819	107,076,777
2020	89,733,894	8,226,761	4,763,556	2,019,894	3,091,795	107,835,900
2021	92,444,615	8,247,852	4,493,415	3,631,954	3,423,880	112,241,716
2022 (estimate)	96,059,199	6,723,612	4,600,000	3,818,318	3,554,025	114,755,154

Source: FY2012 - FY2021: Massachusetts Department of Revenue, Division of Local Services

Source: FY2022: Sudbury Finance Department

ASSESSED VALUES BY PROPERTY CLASS (2012 – 2021)

Fiscal Year	Residential	Open Space	Commercial	Industrial	Personal Property	Total	Residential % of Total	CIP % of Total
2012	3,566,779,121	0	145,365,519	59,764,900	66,426,000	3,838,335,540	92.93	7.07
2013	3,590,745,895	0	146,995,002	59,403,300	66,938,910	3,864,083,107	92.93	7.07
2014	3,695,489,903	0	146,588,764	51,549,800	66,955,670	3,960,584,137	93.31	6.69
2015	3,825,857,903	0	147,618,442	51,552,200	63,887,360	4,088,915,905	93.57	6.43
2016	3,953,667,699	0	153,832,208	52,641,600	70,742,800	4,230,884,307	93.45	6.55
2017	4,128,077,415	0	161,710,160	28,896,800	90,269,320	4,408,953,695	93.63	6.37
2018	4,252,412,677	0	172,317,688	29,891,300	106,053,550	4,560,675,215	93.24	6.76
2019	4,396,808,625	0	189,613,218	30,823,000	111,118,740	4,728,363,583	92.99	7.01
2020	4,451,809,500	0	179,424,076	30,823,000	111,016,580	4,773,073,156	93.27	6.73
2021	4,476,309,078	0	193,733,270	32,737,300	109,526,080	4,812,305,728	93.02	6.98

Source: Massachusetts Department of Revenue, Division of Local Services

PROPERTY TAX RATES BY PROPERTY CLASS (FY2012 – FY2021)

Fiscal Year	Residential	Commercial / Industrial
(Tax rates / \$1,000 valuation)		
2012	17.6	22.95
2013	17.99	23.52
2014	18.03	24.94
2015	17.6	24.88
2016	17.8	25.11
2017	17.74	25.01
2018	17.93	24.3
2019	17.91	24.3
2020	18.45	24.97
2021	18.83	25.55

Source: Massachusetts Department of Revenue, Division of Local Services

ESTIMATED RATE OF INCREASE OF RESIDENTIAL TAX RATE AS IT APPEARS ON AVERAGE RESIDENCE TAX BILL (FY2010 – FY2022)

Fiscal Year	Avg Single Family Home Value	Residential Tax Rate	YoY Change	Avg Single Family Tax Bill	YoY Change
2010	650,508	16.08	N/A	10,460	N/A
2011	627,988	17.03	5.91%	10,695	2.24%
2012	621,410	17.6	3.35%	10,937	2.26%
2013	622,862	17.99	2.22%	11,205	2.45%
2014	640,277	18.03	0.22%	11,544	3.02%
2015	658,974	17.6	-2.38%	11,598	0.47%
2016	678,738	17.8	1.14%	12,082	4.17%
2017	705,763	17.74	-0.34%	12,520	3.63%
2018	726,906	17.93	1.07%	13,033	4.10%
2019	745,653	17.91	-0.11%	13,355	2.46%
2020	746,260	18.45	3.02%	13,768	3.10%
2021	745,255	18.83	2.06%	14,033	1.92%
2022 (estimate)	745,255	19.40	3.04%	14,460	3.04%

Source: Sudbury Finance Department

This chart shows the tax rate and the rate of increase of the tax bill of the average single-family residence by year.

NEW GROWTH AND RATE OF INCREASE OF TOTAL TAX LEVY ADJUSTED FOR THE EFFECT OF NEW GROWTH (FY2010–FY2022)

Fiscal Year	Total Tax Levy	% Increase	New Growth	% Increase Net of New Growth
2010	65,529,153	N/A	634,221	N/A
2011	67,418,506	2.88%	440,537	2.21%
2012	69,007,532	2.36%	520,929	1.58%
2013	71,026,410	2.93%	526,287	2.16%
2014	72,951,707	2.71%	634,048	1.82%
2015	73,549,580	0.82%	778,976	-0.25%
2016	76,997,530	4.69%	601,228	3.87%
2017	79,892,487	3.76%	1,248,532	2.14%
2018	83,323,444	4.29%	983,400	3.06%
2019	86,384,635	3.67%	1,401,700	1.99%
2020	89,733,894	3.88%	963,941	2.76%
2021	92,444,615	3.02%	855,336	2.07%
2022 (estimate)	96,059,199	3.91%	855,336	3.04%

Source: Sudbury Finance Department

This chart shows the new property value added each year (New Growth) and the rate of growth of the total tax levy by year.

CPA FUND REVENUE (FY2011 – 2022)

Fiscal Year	Local Surcharge	State Match Total	Total
2011	1,495,563	431,234	1,926,797
2012	1,530,699	431,743	1,962,442
2013	2,072,600	443,953	2,516,553
2014	1,641,500	895,751	2,537,251
2015	1,662,711	559,382	2,222,093
2016	1,756,562	534,729	2,291,291
2017	1,844,751	391,958	2,236,709
2018	1,961,810	342,975	2,304,785
2019	1,961,331	403,176	2,364,507
2020	2,085,432	525,058	2,610,490
2021 (estimate)	2,000,000	570,000	2,570,000
2022 (estimate)	2,000,000	500,000	2,500,000

NOTE: Under the provisions of the Community Preservation Act (CPA), Sudbury established a Community Preservation Committee in 2002. The CPA fund is funded annually by the Town plus a variable state match. The Town portion of the annual funding is calculated as a 3% CPA surcharge that is collected on all residential properties, except those whose owners take advantage of an exemption applied for in the Assessors' Office. The surcharge is applied to the assessed value of each property less \$100,000. The state portion of the annual funding comes from fees collected by Registry of Deeds which is dedicated for the purpose of funding the state matching funds. The state portion varies year to year.

Additional Information:

COLLECTIVE BARGAINING

Bargaining Unit and Contract Financial Terms:

LS Regional High School

The three-year agreement for the period covering schools year 2019, 2020, and 2021 provides for COLA increases in half-year increments of 0.5%, 1.5%, 0%, 3%, 0.5% and 2%, representing an aggregate COLA increase over three years totaling 6.5%, or approximately 2.17% per year on average. LSRHS and the Teachers' Association agreed to a 0% COLA increase for FY22 to help alleviate budget pressures during the Covid-19 pandemic. Future contract years will be negotiated during FY22.

Sudbury Public Schools, K-8

Teachers

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1 1/2%; 7/1/19: 2 1/4%; 7/1/20: 2 1/2%. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Support Staff

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1 1/2%; 7/1/19: 2 1/2%; 7/1/20: 2 1/4%. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Nurses

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1 1/2%; 7/1/19: 2 1/2%; 7/1/20: 2 1/4%. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Custodians

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1 1/2%; 7/1/19: 2 1/2%; 7/1/20: 2 1/4%

Town

Fire

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Police – Patrol Officers

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Police - Sergeants

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Public Works

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Engineering

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Supervisory

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

Civilian Dispatchers

Three-year contract covering fiscal years 2019, 2020 and 2021. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/18: 1%; 7/1/19: 2%; 7/1/20: 1 1/2%; and 6/30/21 at midnight 1% not to impact FY21 budget. The next three-year contract covering fiscal years 2022, 2023, and 2024 remains unsettled as of the printing of this document.

BUDGET TERMS AND DEFINITIONS

Abatements and Exemptions (previously called Overlay): An amount set by the Assessors to create a fund to cover abatements of (and exemptions from) real and personal tax assessments for the current year, and raised on the tax levy. An abatement is a reduction provided by the Assessors in the assessed tax because of bona fide specific conditions or situations not considered when the tax was levied. An exemption is provided for a variety of purposes, which include, but are not limited to: buildings/property used for religious, government, charity, or pollution control. In addition, exemptions may also be provided to the elderly, handicapped, and veterans under certain conditions.

Abatement Surplus: Accumulation of the surplus amounts of Abatements and Exemptions set aside by the Assessors each year to cover abatements of (and exemptions from) real estate and personal property tax assessments. The accumulated amount for previous years no longer committed for abatements may be used by vote of the Town Meeting.

Benefits and Insurance: This account in the shared expenses section of the budget is comprised primarily of benefits such as health insurance and retirement for both school and general government employees.

Capital Exclusion: A temporary increase in the tax levy to fund a capital project or make a capital acquisition.

Cherry Sheet: An annual statement received from the Department of Revenue detailing estimated receipts for the next fiscal year from the various state aid accounts as well as estimated state and county government charges payable to the state. The name “Cherry Sheet” derives from the color of the paper used.

Circuit Breaker Program: School districts are eligible for reimbursements for students with disabilities whose programs cost greater than four times the statewide foundation budget. “Circuit Breaker” means the reimbursement program for certain costs of special education as specified in M.G.L. c. 71B, § 5.

Debt Exclusion: An override to Proposition 2 ½ for the purpose of raising funds for debt service costs; remains for the life of the debt only.

Enterprise Fund: A separate fund, set up to provide a specific Town service, whereby all direct and indirect/overhead costs of providing the service are funded in total from user charges. An appropriation for an enterprise fund is funded in total from enterprise fund revenue unless otherwise noted. Enterprise fund revenue used to fund services provided by other Town departments will be shown in the warrant after the appropriation total for the department. An enterprise fund is required to fully disclose all costs and all revenue sources needed to provide a service.

Free Cash: Free cash is the available, undesignated fund balance of the general fund and is generated when actual revenue collections are in excess of estimates, when expenditures are less than appropriated, or both. A free cash balance is certified as of July 1 each year by the Department of Revenue and once certified, any or all of the certified amount may be used to defray Town expenses by a vote of the Town Meeting.

Funding Sources for Expenditures: Authorizations for the Town to expend monies are made in the form of a motion at Town Meeting. The wording of the motions will specify the funding source; that is, the place from where money is going to come or will be raised. When a motion reads, “to appropriate a sum of money” without a source being identified, that amount will be included in the tax calculation, whereby the total of all sums to be appropriated will be reduced by an estimate of local and state revenue. The balance needed will be provided by property taxes. When items in the warrant are offset or raised from available funds, those items will also appear as offsets in the determination of the tax rate.

Levy Limit: The maximum amount a community can levy in any given year.

Local Receipts: This is the third largest source of revenue for the Town after property taxes and Cherry Sheet receipts. While it is comprised of a number of different items, the largest source is the auto excise tax.

New Growth: Proposition 2 ½ allows a community to increase its levy limit annually by an amount based upon the valuation of certain new construction and other growth in the tax base that is not the result of property revaluation. New growth becomes part of the levy limit and thus increases at the rate of 2.5% each year as the levy limit increases.

Normal Cost (OPEB): Normal cost generally represents the portion of the cost of projected benefits for active employees allocated to the current plan year.

Override: An override is passed by a majority vote at Town Meeting and at the ballot. There are three types of overrides: An Operating Override, which permanently increases the levy limit; a Debt Exclusion, which increases the levy limit only for the life of the debt; and a Capital Project Override, which increases the levy only for the year in which the project is undertaken.

OPEB: Post-employment benefits that an employee will begin to receive at the start of retirement. This does not include pension benefits paid to the retired employee. Other post-employment benefits that a retiree can be compensated for are life insurance premiums, healthcare premiums and deferred-compensation arrangements.

Proposition 2½: A Massachusetts General Law enacted in 1980 to limit property taxes.

Revolving Fund: Funds that may be used without appropriation and that are established for special uses. Recreation fees, for example, may be paid into a revolving fund. Revolving funds are established by state law or Town bylaw.

Reserve Fund: An amount appropriated by the Annual Town Meeting for emergency or unforeseen purposes. The Finance Committee, by state law, is the sole custodian of the Reserve Fund and approves transfers from the Fund into the operating budgets throughout the year if: (1) the need for funds is of an emergency and/or unforeseen nature, and (2) if, in the judgment of the Finance Committee, the Town Meeting would approve such an expenditure if such a meeting was held. The Reserve Fund is, therefore, a mechanism for avoiding the necessity of frequent Special Town Meetings.

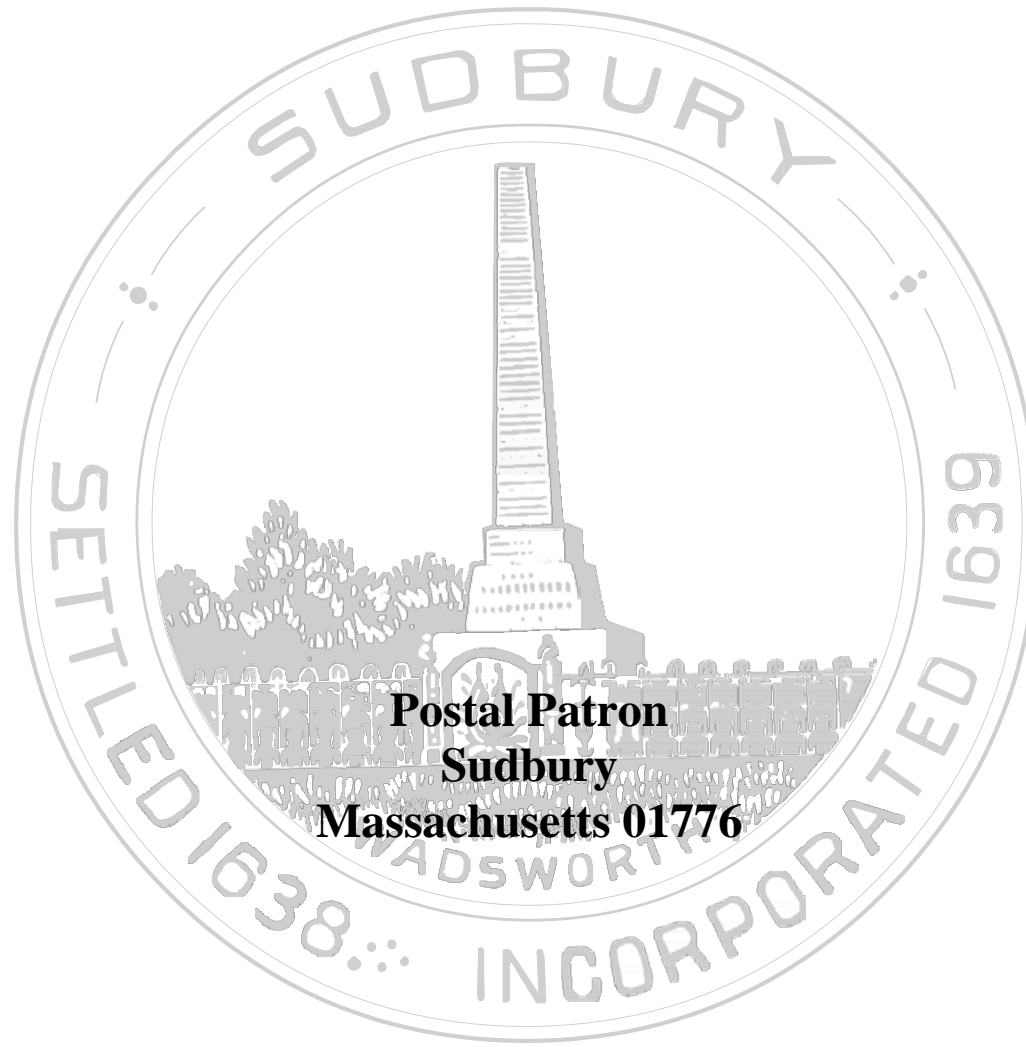
Stabilization Fund: Similar to a "savings account", this account has been used to fund large capital projects such as fire trucks and school roofs. A recent amendment to state law allows the Stabilization Fund to be used for the operating budget, as well as capital purchases; however, the Finance Committee would generally be reluctant to recommend doing so. Placing money into, or taking it out of, the Stabilization Fund requires a 2/3 vote of Town Meeting.

Tax Levy: The property tax levy is the revenue a community can raise through real and personal property taxes. In Massachusetts, municipal revenues to support local spending for schools, public safety, general government and other public services are raised through the property tax levy, state aid, local receipts and other sources. The property tax levy is the largest source of revenue for most cities and towns.

Town-wide Operating Expenses: This account in the general government section of the budget is comprised primarily of operating expenses such as postage, telephone and property liability insurance, that support town-wide operations and are not assigned to any one department or cost center.

**Select Board
Sudbury, MA 01776**

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