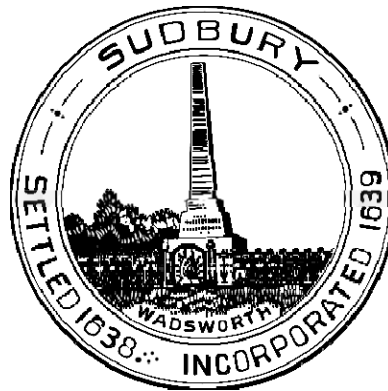


# Town of Sudbury Massachusetts



## OFFICIAL WARRANT

**ANNUAL TOWN MEETING**  
**MONDAY, MAY 5, 2025, 7:30 p.m.**

CONTINUATION DATES, IF NEEDED

**TUESDAY, MAY 6, 2025 – 7:30 p.m.**

**WEDNESDAY, MAY 7, 2025 – 7:30 p.m.**

**MONDAY, MAY 12, 2025 – 7:30 p.m.**

Lincoln-Sudbury Regional High School  
390 Lincoln Road, Sudbury, MA

**BRING THIS BOOK WITH YOU**



**ADDITIONAL ARTICLE INFORMATION**

To learn more about the articles in the Town Meeting  
Warrant, please visit

<https://sudbury.ma.us/townmeeting/2025atm>

**TOWN OF SUDBURY  
2025 ANNUAL TOWN MEETING WARRANT**

**TABLE OF CONTENTS – Part I**

|   | <b>Page</b>        |
|---|--------------------|
| <b>ACCESS TO LSRHS &amp; PROVISIONS FOR PARTICULAR ACCOMMODATIONS .....</b> | <b><i>i</i></b>    |
| <b>ADDITIONAL ACCESS INFORMATION .....</b>                                  | <b><i>ii</i></b>   |
| <b>ELECTRONIC VOTING INFORMATION .....</b>                                  | <b><i>iii</i></b>  |
| <b>SUMMARY OF BASIC TOWN MEETING PROCEDURES.....</b>                        | <b><i>iv</i></b>   |
| <b>CONSENT CALENDAR ARTICLES .....</b>                                      | <b><i>viii</i></b> |

**ARTICLES**

|  |    |
|--|----|
| 1. Hear Reports .....  | 1  |
| 2. FY25 Budget Adjustments (Consent Calendar).....   | 1  |
| 3. FY26 Budget .....   | 2  |
| 4. FY26 Capital Budget .....   | 3  |
| 5. FY26 Transfer Station Enterprise Fund Budget (Consent Calendar) .....                                 | 3  |
| 6. FY26 Pool Enterprise Fund Budget (Consent Calendar).....  | 4  |
| 7. FY26 Recreation Field Maintenance Enterprise Fund Budget (Consent Calendar) .....                     | 5  |
| 8. Snow and Ice Transfer (Consent Calendar) .....  | 6  |
| 9. Unpaid Bills (Consent Calendar).....  | 6  |
| 10. Chapter 90 Highway Funding (Consent Calendar) .....  | 6  |
| 11. FY26 Revolving Fund Spending Limits (Consent Calendar) .....   | 7  |
| 12. FY26 Stabilization Fund (Consent Calendar) .....   | 8  |
| 13. Capital Stabilization Fund.....  | 8  |
| 14. FY25 Pool Enterprise Fund Budget Adjustment.....   | 8  |
| 15. Create Pension Stabilization Fund .....  | 9  |
| 16. Create Accrued Leave Fund .....  | 9  |
| 17. Establishment of a Fairbanks Community Center Revolving Fund (Consent Calendar) .....                | 10 |
| 18. Establishment of a Public Health Revolving Fund (Consent Calendar).....                              | 10 |
| 19. Establishment of an Electric Vehicle (EV) Charging Station Revolving Fund<br>(Consent Calendar)..... | 11 |

**TABLE OF CONTENTS (Continued)**

**Page**

20. Trailside Circle & Bridle Path – Release of Easement (Consent Calendar)..... 12

21. Accept M.G.L. Chapter 200A, Section 9A, Disposition of Abandoned Funds (Consent Calendar)...13

22. Adoption of M.G.L Chapter 59, Section 5, Clause 221: Cost-of-Living Adjustment for  
Veteran’s Real Property Tax Abatement (Consent Calendar)..... 15

23. Amend General Bylaws Chapter 5, Art. II, Sections 5-3 and 5-5, Finance Committee  
(Consent Calendar)..... 15

24. Amend General Bylaws Chapter 11, Capital Planning ..... 16

25. Amend General Bylaws Chapter 68, Section 68-2 Annual Business Meeting (Consent Calendar).... 17

26. Amend General Bylaw Chapter 170, Section 170-2 Weights & Measures Fees ..... 18

27. Amend General Bylaw Chapter 129, Section 129-3, the Stretch Energy Code, to Adopt the  
Stretch Energy Code and the Specialized Stretch Energy Code ..... 19

28. Amend Zoning Bylaw Section 5500 Accessory Dwelling Units in Residence Districts  
and Section 7110 Definitions and Word Usage..... 19

29. Purchase of Fire Engine..... 22

30. Ambulance Replacement..... 23

31. Roads, Culverts, Drainage, Consultants & Construction ..... 23

32. Dump Truck with Plow & Spreader (Consent Calendar) ..... 24

33. 6-Wheel Dump Truck with Slide-in Sander (Consent Calendar)..... 24

34. Atkinson Pool Renovation: Additional Funds ..... 24

35. DPW Emergency Operations Center Cost Share ..... 25

36. School Classroom Instructional Equipment Replacement (Consent Calendar) ..... 26

37. ELA Curriculum Implementation (Consent Calendar) ..... 26

38. HVAC Capital Improvement Engineering Study (Consent Calendar)..... 27

39. Fire Alarm, Emergency Lighting and Bi-Directional Amplification System Design Fees  
(Consent Calendar) ..... 28

40. Haynes Elementary Roof Replacement and Repair ..... 28

41. Nixon Elementary Roof Replacement and Repair ..... 29

**TABLE OF CONTENTS (Continued)**

**Page**

42. Sudbury 250<sup>th</sup> Committee Funds (Consent Calendar).....30

43. Funding of Acquisition of MBTA Buildings.....30

44. Community Preservation Act Fund – Fairbank Community Center and Haskell Field  
Landscape Master Plan (Consent Calendar).....31

45. Community Preservation Act Fund – Restoring Water Quality in Hop Brook (Consent Calendar) ...32

46. Community Preservation Act Fund – Sudbury Housing Authority Allocation.....33

47. Community Preservation Act Fund – Sudbury Housing Trust Allocation (Consent Calendar) .....34

48. Community Preservation Act Fund – Hosmer House Collection (Consent Calendar).....35

49. Community Preservation Act Fund – Hosmer House Envelope, Heating, Ventilation &  
Air Conditioning (Consent Calendar) .....36

50. Community Preservation Act Fund – Hosmer House Wooden Roof (Consent Calendar).....37

51. Community Preservation Act Fund – Regional Housing Services Office (RHSO)  
Membership Fee (Consent Calendar).....38

52. Community Preservation Act Fund – Reversion of Unspent Funds (Consent Calendar).....38

53. Community Preservation Act Fund – General Budget and Appropriations  
(Consent Calendar) .....39

54. Decrease CPA Surcharge (Petition Article).....40

55. Means Tested Senior Tax Exemption Amendment & Special Act (Petition Article) .....40

56. 10-Year Plan to Fund & Construct Walkways Along Sudbury’s Main Thru Roads  
(Petition Article) .....42

\*Town Counsel Opinions (See Page 44)

**Part II – FINANCE SECTION (after page 44)**

## ACCESS TO LINCOLN-SUDBURY REGIONAL HIGH SCHOOL AND PROVISIONS FOR PARTICULAR ACCOMMODATIONS

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

The Select Board wishes to accommodate the attendance and participation of persons with disabilities at Town Meeting. As such, we urge those who may require particular accommodations to read the following carefully.

**Parking:** “HP” parking spaces are provided at two different locations: 1) the main entrance at the upper level (which will require using an elevator to the lower level to check in and to access the auditorium) and 2) the main parking lot to the right (east) of the school. From this location, you may also be dropped off at the entry walkway – a clear path to the entrance doors, leading directly to the check-in tables and the auditorium. Police on duty will provide assistance as needed, or requested.

**Auditorium Balcony:** The balcony can only be accessed from the Main Level. From the lower level of the building, you may use either the stairs or the elevator to gain entrance to the balcony – the upper level of the auditorium. The Moderator has ruled that if there is adequate seating on the main floor, the balcony **will not** be opened.

**Persons with Ambulatory Disabilities:** Spaces for persons who use wheelchairs will be available at the front and at the rear of the auditorium. For those who use assistive devices to ambulate, seating will be reserved at the rear of the hall and may be used if desired.

**Persons who are Blind or have Vision Impairments:** Reserved seating will be available at the front of the auditorium for persons with vision impairments who prefer to be close to the overhead projector. Large print materials will be made available where possible. We encourage those making prepared, formal presentations to have copies of viewgraphs, especially motions, available in large print.

**Persons who are Deaf or have Hearing Impairments:** Closed captioning will be available.

**Restrooms:** Restrooms are located across the hall from the auditorium.

## ADDITIONAL ACCESS INFORMATION 2025

### WHEELCHAIR-ACCESSIBLE TRANSPORTATION

The Sudbury Connection van service, through the Sudbury Senior Center and MetroWest Regional Transit Authority (MWRTA), will provide free accessible transportation to and from the meetings. If you are a registered rider, please reserve a ride to Sudbury Town Meeting by Thursday, May 1 by 4:00 PM by calling 508-820-4650. If you are not registered as a rider, please contact the Sudbury Senior Center to register at 978-443-3055 to complete an application by Wednesday, April 30 at 4:00 PM.

### HEARING & SIGHT IMPAIRMENTS

Those with hearing and vision impairments are encouraged to sit in designated areas by the front of the stage. **Closed Captioning** screens will be available. Those who wish to use their phone or device to view the captions may do so at <https://sudbury.ma.us/townmeeting/captions>.

Assisted Listening services are available through the **Audio Fetch** app, available on iOS and Android devices. A QR code to direct you to where to download the app will be available at Town Meeting or you can download the app in advance via the links below:

- Apple Store: <https://apps.apple.com/us/app/audiofetch/id955015484>
- Google Play: <https://play.google.com/store/apps/details?id=com.waio.mobile.android>

Please bring your own headphones to use Fetch on your device.

If you do not own a smart phone or tablet and/or headphones, please contact the Sudbury Senior Center at 978-443-3055 or [senior@sudbury.ma.us](mailto:senior@sudbury.ma.us) as soon as possible, and at the latest by Tuesday, April 29 at 4:00 PM so that an accommodation may be arranged.

### MOBILITY AID, MEDICAL DEVICE, WHEELCHAIR AND OTHER ACCESSIBILITY ASSISTANCE

Seating for persons using a wheelchair is located in both the right and left rear sections of the main auditorium. Persons who use oxygen or mobility aids may also find it useful to sit near the back for ease of access and to exit.

### TOWN MEETING ELECTRONIC VOTING DEVICES (CLICKERS)

Electronic Voting Devices (“clickers”) will be used at the 2025 Sudbury Annual Town Meeting. Clickers with braille are available by request. If you wish to use a **Braille Voting Device**, please request one from the Election Official when you sign in to vote.

Persons requiring an accommodation in order to attend Town Meeting are urged to contact the Sudbury Senior Center at **978-443-3055** or [senior@sudbury.ma.us](mailto:senior@sudbury.ma.us) as soon as possible and at the latest by Tuesday, April 29 at 4:00 PM.

# ELECTRONIC VOTING AT TOWN MEETING

## HOW TO VOTE

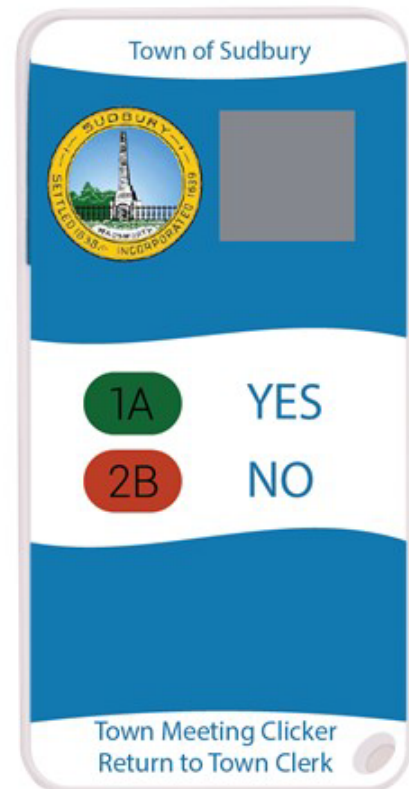
- The Moderator will declare Open Vote and the Close of Vote
- To respond, press the button that matches your answer:  
**1A = YES**  
**2B = NO**
- Vote will be submitted automatically
- Only the last vote counts
- No need to press "Send"

## WHEN IS THE VOTE COUNTED?

- Only respond when the vote is open
- You may correct your previous votes  
**ONLY YOUR LAST VOTE WILL BE COUNTED**
- Recorded results will appear on large overhead screen

**Don't forget to turn in your voting devices to  
clerk staff before leaving.**

**THEY DO NOT WORK OUTSIDE OF THE AUDITORIUM.**





## **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 wait for a microphone to be passed to you at your seat. 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. If the count is taken using electronic voting technology, the Moderator shall declare the vote, and provide an opportunity for any voter to notify the Town Moderator that they believe their vote was recorded in error; if so, the Moderator shall direct that the record be corrected by the Town Clerk. If seven or more voters doubt the vote, the Town Moderator may request another vote using the handheld technology, or otherwise set the manner of voting.
6. If Town Meeting approves a motion for reconsideration, the motion at issue immediately prior to the vote will be back before the voters, and the electronic voting system shall be used to record and tabulate the votes taken on the main motion.
7. If such electronic voting equipment is unavailable, the Town Moderator shall notify the Town Meeting as to what manner of voting will be used, and, unless 20 people stand in opposition, such method shall be implemented. If 20 voters do stand, then the Moderator's recommendation is pending before the meeting, subject to amendment like any other motion. If the Moderator is unable to decide the vote or if the declaration by the Moderator is immediately questioned by 10 or more voters rising in their places, the Moderator shall then direct that a count be taken, whether by counting raised hands, raised placards or other indicia of vote, or by secret ballot or otherwise, as determined by the Moderator in the Moderator's sole discretion.

8. In the event of a non-electronic vote, 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.

### **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](http://www.sudbury.ma.us).
5. If you have an amendment, you should e-mail it to the Technology Administrator at [infosystems@sudbury.ma.us](mailto:infosystems@sudbury.ma.us), with a copy to the Moderator at [moderator@sudbury.ma.us](mailto:moderator@sudbury.ma.us), and the Town Clerk at [clerk@sudbury.ma.us](mailto: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/her 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.

### **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. The Moderator will read the title of each article on the Consent Calendar in order to give voters the opportunity to remove it from the Consent Calendar. A total of seven (7) voters must request removal from the Consent Calendar. In the event an article is removed from the Consent Calendar, it will be voted upon when it is taken up in the usual course.
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 2. FY25 BUDGET ADJUSTMENTS:** Move to indefinitely postpone.  
(See article at page 1.)

**ARTICLE 5. FY25 TRANSFER STATION ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$327,915 for the Transfer Station Enterprise Fund for FY26, and further to authorize use of an additional \$18,955 for indirect costs; such sums to be raised from \$314,870 in FY26 receipts from the Transfer Station Enterprise Fund and \$32,000 from Retained Earnings, as set forth in the article.  
(See article at page 3.)

**ARTICLE 6. POOL ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$498,434 for the Pool Enterprise Fund for FY26, and further to authorize use of an additional \$48,600 for indirect costs; said sums to be raised from \$407,034 in FY26 receipts from the Pool Enterprise Fund and \$140,000 from retained earnings, as set forth in the article. (See article at page 4.)

**ARTICLE 7. RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$222,337 for the Recreation Field Maintenance Enterprise Fund for FY26, and further to authorize use of an additional \$30,240 for indirect costs; said sums to be raised from

\$210,577 in FY26 receipts from the Recreation Field Maintenance Enterprise Fund and \$42,000 from retained earnings, as set forth in the article. (See article at page 5.)

**ARTICLE 8. SNOW AND ICE TRANSFER:** Move to appropriate \$500,000 from Free Cash for the fiscal year beginning July 1, 2024, said sum of money to be used for the FY2025 snow and ice deficit (See article at page 6.)

**ARTICLE 9. UNPAID BILLS:** Move to indefinitely postpone. (See article at page 6.)

**ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING:** Move in the words of the article as printed in the Warrant. (See article at page 6.)

**ARTICLE 11. FY26 REVOLVING FUND SPENDING LIMITS:** Move in the words of the article as printed in the Warrant. (See article at page 7.)

**ARTICLE 12. FY26 STABILIZATION FUND:** Move in the words of the article as printed in the Warrant with the sum of \$400,000 to be transferred from Free Cash. (See article at page 8.)

**ARTICLE 17. ESTABLISHMENT OF A FAIRBANK COMMUNITY CENTER REVOLVING FUND:** Move in the words of the article as printed in the Warrant. (See article at page 10.)

**ARTICLE 18. ESTABLISHMENT OF A PUBLIC HEALTH REVOLVING FUND:**  
Move in the words of the article as printed in the Warrant. (See article at page 10.)

**ARTICLE 19. ESTABLISHMENT OF AN ELECTRIC VEHICLE (EV) CHARGING STATION REVOLVING FUND:** Move in the words of the article as printed in the Warrant. (See article at page 11.)

**ARTICLE 20. TRAILSIDE CIRCLE & BRIDLE PATH – RELEASE OF EASEMENT:**  
Move in the words of the article as printed in the Warrant. (See article at page 12.)

**ARTICLE 21. ACCEPT M.G.L. CHAPTER 200A, SECTION 9A, DISPOSITION OF ABANDONED FUNDS:** Move in the words of the article as printed in the Warrant. (See article at page 13.)

**ARTICLE 22. ADOPTION OF M.G.L. CHAPTER 59 SECTION 5, CLAUSE 22I: COST-OF-LIVING ADJUSTMENT FOR VETERAN’S REAL PROPERTY TAX ABATEMENT:**  
Move in the words of the article as printed in the Warrant. (See article at page 14.)

**ARTICLE 23. AMEND GENERAL BYLAWS, CHAPTER 5, ART. II, SECTIONS 5-3 AND 5.5, FINANCE COMMITTEE:** Move in the words of the article as printed in the Warrant. (See article at page 15.)

**ARTICLE 25. AMEND GENERAL BYLAWS CHAPTER 68, SECTION 68-2 ANNUAL BUSINESS MEEETING:** Move in the words of the article as printed in the Warrant. (See article at page 17.)

**ARTICLE 32. DUMP TRUCK WITH PLOW & SPREADER:** Move in the words of the article as printed in the Warrant with the sum of \$146,000 to be transferred from Free Cash. (See article at page 23.)

**ARTICLE 33. 6-WHEEL DUMP TRUCK WITH SLIDE-IN SANDER:** Move in the words of the article as printed in the Warrant with the sum of \$382,000 to be transferred from Free Cash. (See article at page 24.)

**ARTICLE 36. SPS SCHOOL CLASSROOM INSTRUCTIONAL EQUIPMENT REPLACEMENT:** Move in the words of the article as printed in the Warrant with the sum of \$100,000 to be raised by taxation. (See article at page 25.)

**ARTICLE 37. ELA CURRICULUM IMPLEMENTATION:** Move in the words of the article as printed in the Warrant with the sum of \$250,720 to be transferred from Free Cash. (See article at page 26.)

**ARTICLE 38. HVAC CAPITAL IMPROVEMENT ENGINEERING STUDY:** Move in the words of the article as printed in the Warrant with the sum of \$152,000 to be transferred from Free Cash. (See article at page 27.)

**ARTICLE 39. FIRE ALARM EMERGENCY LIGHTING AND BI-DIRECTIONAL AMPLIFICATION SYSTEM DESIGN FEES:** Move in the words of the article as printed in the Warrant with the sum of \$190,000 to be transferred from Free Cash. (See article at page 27.)

**ARTICLE 42. SUDBURY 250<sup>th</sup> COMMITTEE FUNDS:** Move in the words of the article as printed in the Warrant. (See article at page 30.)

**ARTICLE 44. COMMUNITY PRESERVATION ACT FUND – FAIRBANK COMMUNITY CENTER AND HASKELL FIELD LANDSCAPE MASTER PLAN:** Move to appropriate \$500,000 as set forth in the words of the article as printed in the Warrant. (See article at page 31.)

**ARTICLE 45. COMMUNITY PRESERVATION ACT FUND – RESTORING WATER QUALITY IN HOP ROOK:** Move to appropriate \$90,000 as set forth in the words of the article as printed in the Warrant. (See article at page 31.)

**ARTICLE 47. COMMUNITY PRESERVATION ACT FUND – SUDBURY HOUSING TRUST ALLOCATION:** Move to appropriate \$690,000 as set forth in the words of the article as printed in the Warrant. (See article at page 33.)

**ARTICLE 48. COMMUNITY PRESERVATION ACT FUND – HOSMER HOUSE COLLECTION:** Move to appropriate \$119,500 as set forth in the words of the article as printed in the Warrant. (See article at page 34.)

**ARTICLE 49 COMMUNITY PRESERVATION ACT FUND – HOSMER HOUSE ENVELOPE, HEATING, VENTILATION & AIR CONDITIONING:** Move to appropriate \$640,000 as set forth in the words of the article as printed in the Warrant. (See article at page 35.)

**ARTICLE 50. COMMUNITY PRESERVATION ACT FUND – HOSMER HOUSE WOODEN ROOF:** Move to appropriate \$386,000 as set forth in the words of the article as printed in the Warrant. (See article at page 36.)

**ARTICLE 51. COMMUNITY PRESERVATION ACT FUND – REGIONAL HOUSING SERVICES OFFICE (RHSO) MEMBERSHIP FEE:** Move to appropriate \$43,000 as set forth in the words of the article as printed in the Warrant. (See article at page 37.)

**ARTICLE 52. COMMUNITY PRESERVATION ACT FUND – RETURN OF UNSPENT FUNDS:** Move in the words of the article as printed in the Warrant. (See article at page 38.)

**ARTICLE 53. COMMUNITY PRESERVATION ACT FUND – GENERAL BUDGET AND APPROPRIATIONS:** Move to appropriate the sums recommended by the CPC in the following Community Preservation Act budget for FY26 Community Preservation surtaxes as printed in the Warrant.

\$ 118,050     Administrative and Operating Cost

\$ 628,943     Debt Service

(See article at page 39.)

**ARTICLE 55. MEANS TESTED SENIOR TAX EXEMPTION AMENDMENT & SPECIAL ACT:** Move in the words of the article as printed in the Warrant. (See article at page 40.)

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 1**

**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 Auditorium, 390 Lincoln Road, in said Town on Monday, May 5, 2025, at 7:30 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 2024 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. FY25 BUDGET ADJUSTMENTS**

*(Consent Calendar)*

To see if the Town will vote to amend the votes taken under Article 3, FY25 Budget, of the 2024 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 FY25 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 REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 3. FY26 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, 2025 through June 30, 2026, inclusive, in accordance with the following schedule, which is incorporated herein by reference:

| <b>EXPENDITURES</b>           |   | <b>FY26<br/>Recommended</b> |
|-------------------------------|---|-----------------------------|
| 300                           | Education - Sudbury Public Schools (SPS)              | 47,279,447                  |
| 300                           | Education - LS Regional High School (LS) <sup>1</sup> | 30,252,405                  |
| 300                           | Education - Vocational                                | 400,000                     |
| <b>Total Schools</b>          |   | <b>77,931,852</b>           |
| 100                           | General Government <sup>5</sup>                       | 4,049,199                   |
| 200                           | Public Safety <sup>4</sup>                            | 10,679,760                  |
| 400                           | Public Works  | 6,414,763                   |
| 500                           | Human Services  | 1,072,144                   |
| 600                           | Culture & Recreation                                  | 1,773,678                   |
| <b>Total Town Departments</b> |   | <b>23,989,544</b>           |
| 800                           | Reserve Fund  | 300,000                     |
| 800                           | Town Wide Operating & Transfers                       | 226,764                     |
| 700                           | Town Debt Service                                     | 4,969,223                   |
| 900                           | Employee Benefits (Town and SPS) <sup>2</sup>         | 17,973,338                  |
| 1000                          | OPEB Trust Contribution (Town and SPS) <sup>3</sup>   | 650,000                     |
| <b>TOTAL OPERATING BUDGET</b> |   | <b><u>126,040,721</u></b>   |

*(not including Capital, Stabilization or Enterprise Funds)*

<sup>1</sup> Includes \$428,279 for Debt Service and \$334,492 for OPEB

<sup>2</sup> Includes \$7,637,358 for Town and \$10,335,980 for SPS

<sup>3</sup> Includes \$214,500 for Town and \$435,500 for SPS

<sup>4</sup> Appropriation is partially funded by \$660,000 of ambulance receipts

<sup>5</sup> Appropriation is partially funded by \$35,000 of solar revolving fund receipts

; 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 POSITION: The Select Board supports this article.

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

**ARTICLE 4. FY26 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:

| <b><u>OPERATING CAPITAL BUDGET</u></b> | <b>FY26<br/>Recommended</b> |
|--|-----------------------------|
| Sudbury Public Schools                 | 410,000                     |
| Information Systems                    | 179,800                     |
| Fire                                   | 138,100                     |
| Public Works                           | 236,500                     |
| Conservation                           | 50,000                      |
| Health                                 | 50,000                      |
| Combined Facilities                    | 155,000                     |
| <b>Total Operating Capital Budget</b>  | <b><u>1,219,400</u></b>     |

; 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 POSITION: The Select Board supports this article.

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

**ARTICLE 5. FY26 TRANSFER STATION ENTERPRISE FUND BUDGET** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY26 budget of the Transfer Station Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

| <b>TRANSFER STATION ENTERPRISE FUND</b>       | <b>FY24<br/>Actual</b> | <b>FY25<br/>Appropriated</b> | <b>FY26<br/>Recommended</b> |
|---|------------------------|------------------------------|-----------------------------|
| Direct Cost                                   | 282,369                | 312,318                      | 327,915                     |
| Indirect Cost <sup>1</sup>                    | 17,551                 | 17,551                       | 18,955                      |
| <b>Total Expenditures</b>                     | <b>299,920</b>         | <b>329,869</b>               | <b>346,870</b>              |
| Enterprise Receipts                           | 315,827                | 329,869                      | 314,870                     |
| Retained Earnings                             |                        |                              | 32,000                      |
| <b>Total Receipts &amp; Retained Earnings</b> | <b>315,827</b>         | <b>329,869</b>               | <b>346,870</b>              |

<sup>1</sup> 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. FY26 POOL ENTERPRISE FUND BUDGET**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY26 budget of the Atkinson Pool Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

| <b>POOL ENTERPRISE FUND</b>                   | <b>FY24<br/>Actual</b> | <b>FY25<br/>Appropriated</b> | <b>FY26<br/>Recommended</b> |
|---|------------------------|------------------------------|-----------------------------|
| Direct Cost                                   | 267,677                | 492,783                      | 498,434                     |
| Indirect Cost <sup>1</sup>                    | 45,000                 | 45,000                       | 48,600                      |
| <b>Total Expenditures</b>                     | <b>312,677</b>         | <b>537,783</b>               | <b>547,034</b>              |
| Enterprise Receipts                           | 413,944                | 407,783                      | 407,034                     |
| Retained Earnings                             |                        | 130,000                      | 140,000                     |
| <b>Total Receipts &amp; Retained Earnings</b> | <b>413,944</b>         | <b>537,783</b>               | <b>547,034</b>              |

<sup>1</sup> 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. FY26 RECREATION FIELD MAINTENANCE ENTERPRISE FUNDBUDGET**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY26 budget of the Recreation Field Maintenance Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

| <b>FIELD MAINTENANCE ENTERPRISE FUND</b>      | <b>FY24<br/>Actual</b> | <b>FY25<br/>Appropriated</b> | <b>FY26<br/>Recommended</b> |
|---|------------------------|------------------------------|-----------------------------|
| Direct Cost                                   | 171,706                | 205,163                      | 211,837                     |
| Indirect Cost <sup>2</sup>                    | 28,000                 | 28,000                       | 30,240                      |
| Transfer Trust <sup>1</sup>                   | 10,500                 | 10,500                       | 10,500                      |
| <b>Total Expenditures</b>                     | <b>210,206</b>         | <b>243,663</b>               | <b>252,577</b>              |
| Enterprise Receipts                           | 205,842                | 243,663                      | 210,577                     |
| Retained Earnings                             |                        |                              | 42,000                      |
| <b>Total Receipts &amp; Retained Earnings</b> | <b>205,842</b>         | <b>243,663</b>               | <b>252,577</b>              |

<sup>1</sup> Direct Cost include \$10,500 of Capital Expenditures

<sup>2</sup> 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**

*(Consent Calendar)*

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 25 Snow and Ice deficit; or act on anything relative thereto.

Submitted by the Town Manager. (Majority vote required)

TOWN MANAGER REPORT: This article will fund any deficit in the snow and ice account required due to the nature of this year’s winter.

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**

*(Consent Calendar)*

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. FY26 REVOLVING FUND SPENDING LIMITS**

*(Consent Calendar)*

To see if the Town will vote to establish the FY26 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 General Bylaw Chapter 25, Section 25-5 Limitation on expenditures:

| Fund   | Department                   | Maximum Amount |
|--|------------------------------|----------------|
| Public Health Vaccinations & Tobacco Control         | Board of Health              | \$50,000       |
| Plumbing & Gas Inspectional Services                 | Building Inspector           | \$75,000       |
| 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                 | \$30,000       |
| Fire Department Permits                              | Fire                         | \$70,000       |
| Goodnow Library Meeting Rooms                        | Goodnow Library              | \$15,000       |
| Goodnow Library Services                             | Goodnow Library              | \$30,000       |
| Recreation Programs                                  | Park & Recreation Commission | \$570,000      |
| Teen Center  | Park & Recreation Commission | \$15,000       |
| Youth Programs                                       | Park & Recreation Commission | \$150,000      |
| Bus  | Sudbury Public School        | \$600,000      |
| Instrumental Music                                   | Sudbury Public School        | \$100,000      |
| Cable Television                                     | Town Manager                 | \$30,000       |
| Rental Property                                      | Town Manager                 | \$50,000       |
| Dog  | Town Clerk                   | \$75,000       |
| Zoning Board of Appeals                              | Zoning Board of Appeals      | \$50,000       |
| Solar Energy   | Combined Facilities          | \$1,000,000    |

; or act on anything relative thereto.

Submitted by the Town Finance Director.

(Majority vote required)

FINANCE DIRECTOR REPORT: As set forth in General Bylaw Chapter 25, this article seeks authorization for Fiscal Year 2026 for revolving funds previously established pursuant to M.G. L. c.44, s.53E ½. 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 M.G.L. c.44, s, 53E ½. The maximum amount stated is the same as the FY25 maximum voted for each revolving fund except for the following: the Building Inspector Plumbing and Gas

Inspectional Service increased from \$65,000 to \$75,000; the Goodnow Library Meeting Rooms increased from \$10,000 to \$15,000; and the Goodnow Library Services increased from \$25,000 to \$30,000.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 12. FY26 STABILIZATION FUND** *(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 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 13. CAPITAL STABILIZATION FUND**

To see if the Town will vote to raise and appropriate or transfer from available funds, the sum of \$700,000, or any other sum, to be added to the Capital Stabilization Fund established under Article 13 of the 2018 Annual Town Meeting; or act on anything relative thereto.

Submitted by the Town Manager. (Majority vote required)

TOWN MANAGER REPORT: This transfer is for the purpose of saving funds for future capital needs. Based on the Select Board's Budget and Financial Policies, the Town's goal is to maintain in the Capital Stabilization Fund an amount equal to 2% of the total projected general fund operating revenues for the last fiscal year.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 14. FY25 POOL ENTERPRISE FUND BUDGET ADJUSTMENT**

To see if the Town will vote to amend the votes taken under Article 6, FY25 Pool Enterprise Fund Budget, of the 2025 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 Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: This article will allow flexibility to review all accounts within the FY25 Pool Enterprise Budget to make adjustments at the Annual Town Meeting as necessary.

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

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

**ARTICLE 15. CREATE PENSION STABILIZATION FUND**

To see if the Town will vote to create, in accordance with the provisions of Chapter 40, Section 5B of the Massachusetts General Laws, a Pension Stabilization Fund; and to raise and appropriate, borrow or transfer from available funds the sum of \$175,000 to be placed in said fund; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: The Pension Stabilization Fund will be established as a reserve fund to hold funds to make county retirement assessments. The Pension Stabilization Fund will be separate and distinct from other stabilization funds. From time to time, the Administration will ask Town Meeting to transfer funds to the Pension Stabilization Fund from Free Cash or other sources. Such practice is highly endorsed by the Division of Local Services (DLS) and is sound business practice.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee does not recommend approval of this article.

**ARTICLE 16. CREATE ACCRUED LEAVE FUND**

To see if the Town will vote to accept the provisions of G.L. c.40, s.13D to create a compensated absences fund to be known as the Accrued Leave Fund, for the future payment of accrued liabilities for compensated absences due any employee of the Town upon their retirement, resignation or termination, and to appropriate the sum of \$25,000 or any other sum, for such purpose and to determine whether such sum shall be raised in the tax levy, transferred from available funds, or by any combination of these methods, and to authorize the Town Manager to make payments from such fund in accordance with the Employee Handbook and collective bargaining agreements; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: This article will establish a fund by which the Town can maintain a reserve to deal with future costs of accumulated leave benefits for retiring and separating Town employees. Such practice is highly endorsed and recommended by the Town's auditors, Division of Local Services (DLS) and is sound business practice.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee does not recommend approval of this article.

**ARTICLE 17. ESTABLISHMENT OF A FAIRBANK COMMUNITY CENTER REVOLVING FUND**

*(Consent Calendar)*

To see if the Town will vote to amend Article II s.25-4 (Adopted as Art. XXXIII of the General Bylaws) and authorize the establishment of a new revolving fund for fiscal year 2026 and subsequent years, to be known as the “Fairbank Community Center Revolving Fund” to be used for the purposes of expenses related to the rental of the building rental of the Fairbank Community Center, and by inserting the following text into the list and description of revolving funds as set forth in Article II, s. 25-4:

Expenditures from the fund shall be authorized by the Town Manager and shall not exceed an annual limit of \$75,000 as established by Town Meeting.

| <i>Program or Purpose</i>  | <i>Authorized Representative or Board to Spend</i> | <i>Department Receipts</i>   |
|--|--|--|
| This fund will be used to cover personnel and expenses related to making the Fairbank Community Center available for rental. | Town Manager                                       | Proceeds, charges or other receipts received from the rental of the Fairbank Community Center. |

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: This article seeks to establish a dedicated revolving fund for the rental of the Fairbank Community Center. The fees cover the expenses associated with making the facility available, including custodial, utilities, and ordinary repairs and maintenance. Revenues deposited into this fund shall include fees and revenue collected from the rental of the Fairbank Community Center.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 18. ESTABLISHMENT OF A PUBLIC HEALTH REVOLVING FUND**

*(Consent Calendar)*

To see if the Town will vote to amend Article II s.25-4 (Adopted as Art. XXXIII of the General Bylaws) and authorize the establishment of a new revolving fund for fiscal year 2026 and subsequent years, to be known as the “Public Health Revolving Fund,” to be used for the purposes of emergency public health preparedness and public health programming including but not limited to immediate public health emergency responses, community outreach activities, capacity-building initiatives, wellness programs, and other public health activities that promote and protect the health and well-being of the Town’s residents, and by inserting the following text into the list and description of revolving funds as set forth in Article II, s. 25-4:

Expenditures from the fund shall be authorized by the Health Director and shall not exceed an annual limit of \$50,000 as established by Town Meeting.

| <i>Program or Purpose</i>   | <i>Authorized Representative or Board to Spend</i> | <i>Department Receipts</i>   |
|---|--|--|
| Expenses related to Public Health Emergency response, programming and community outreach, and initiatives and activities that promote and protect the health of the Town’s residents. | Health Director                                    | Proceeds, charges or other receipts received from activities or programs to support cross-jurisdictional regional shared services and/or fees for service. |

; or act on anything relative thereto.

Submitted by the Board of Health.

(Majority vote required)

BOARD OF HEALTH REPORT: This article seeks to establish a dedicated Public Health Revolving Fund to allow the Health Department to respond more effectively and flexibly to public health emergencies and emerging community health needs. By utilizing revenues from the public health excellence grant and other shared services fees, the fund will enable the department to quickly implement necessary programs, outreach efforts, and educational initiatives without delay, both regionally and locally. In addition to strengthening emergency response capabilities, this revolving fund will also support the expansion of public health and wellness programming, ensuring the department can proactively address long-term health priorities. This mechanism ensures that resources are readily available to address urgent public health concerns and promote the well-being of the community in a timely manner. Revenues deposited into this fund shall include fees collected from the Public Health Excellence Grant for shared services through the Massachusetts Department of Public Health, and other proceeds, charges or other receipts received from activities or programs to support cross-jurisdictional regional shared services and/or fees for service.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 19. ESTABLISHMENT OF AN ELECTRIC VEHICLE (EV) CHARGING STATION REVOLVING FUND**

*(Consent Calendar)*

To see if the Town will vote to amend Article II s. 25-4 (Adopted as Art. XXXIII of the General Bylaws) and authorize the establishment of a new revolving fund for fiscal year 2026 and subsequent years, to be known as the “Electric Vehicle (EV) Charging Station Revolving Fund,” to be used for the purposes in connection with the operation of town equipment, programs or activities that generate fees, charges, or other receipts to support all or some of the expenses for the Electric Vehicle Charging Stations, and by inserting the following text into the list and description of revolving funds as set forth in Article II. s. 25-4:

Expenditures from the fund shall be authorized by the Facilities Director and shall not exceed an annual limit of \$150,000 as established by Town Meeting.

| <i>Program or Purpose</i>   | <i>Authorized Representative or Board to Spend</i> | <i>Department Receipts</i>  |
|---|--|---|
| This fund will be used to cover expenses related to the town's EV Charging Stations | Facilities Director                                | Proceeds, charges or other receipts received from the fees collected at the EV Charging Stations. |

; or act on anything relative thereto.

Submitted by the Facilities Director.

(Majority vote required)

FACILITIES DIRECTOR REPORT: During each fiscal year, the Facilities Department may incur liabilities against and spend monies from the Electric Vehicle Charging Revolving Fund for the energy, preventative maintenance and capital costs associated with electric vehicle charging stations on Town facilities. Revenues deposited into this fund shall include fees and revenue collected from the fees collected from the EV Charging Stations.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 20. TRAILSIDE CIRCLE & BRIDLE PATH – RELEASE OF EASEMENT**

*(Consent Calendar)*

To see if the Town will vote to authorize the Select Board to release, terminate, and extinguish any and all rights the Town has in that certain 20-foot wide pedestrian access easement shown on a Plan of Land dated May 19, 1986, recorded in the Middlesex South District Registry of Deeds as Plan Number 1426 of 1986, and in Book 17488, Page 75, as reserved in a Quitclaim Deed recorded in said Registry in Book 83551, Page 110, and as granted to the Town and recorded in said Registry in Book 17488, Page 122; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD REPORT: This Article authorizes the Select Board to release, terminate, and extinguish an easement allowing pedestrian access over certain properties on Trailside Circle and Bridle Path. The easement was reserved and granted to the Town in 1986 by the developer of the Tall Pines Subdivision at the time of its creation in order to allow public access between two pieces of conservation land on either side of the subdivision. The Select Board has determined that the easement is no longer necessary as the result of the construction of the Mass. Central Rail Trail which runs parallel to the easement area and will now provide access between the conservation land areas.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 21. ACCEPT M.G.L., CHAPTER 200A, SECTION 9A, DISPOSITION OF ABANDONED FUNDS** *(Consent Calendar)*

To see if the Town will vote to accept the provisions of M.G.L., Chapter 200A, Section 9A, Disposition of abandoned funds by city or town, as follows:

Section 9A. (a) In any city, town or district that accepts this section in the manner provided in section 4 of chapter 4, there shall be an alternative procedure for disposing of abandoned funds held in the custody of the city, town or district as provided in this section.

(b) Any funds held in the custody of a city, town or district may be presumed by the city, town or district treasurer to be abandoned unless claimed by the corporation, organization, beneficiary or person entitled thereto within 1 year after the date prescribed for payment or delivery; provided, however, that the last instrument intended as payment shall bear upon its face the statement "void if not cashed within 1 year from date of issue". After the expiration of 1 year after the date of issue, the treasurer of a city, town or district may cause the financial institution upon which the instrument was drawn to stop payment on the instrument or otherwise cause the financial institution to decline payment on the instrument and any claims made beyond that date shall only be paid by the city, town or district through the issuance of a new instrument. The city, town or district and the financial institution shall not be liable for damages, consequential or otherwise, resulting from a refusal to honor an instrument of a city, town or district submitted for payment more than a year after its issuance.

(c) The treasurer of a city, town or district holding funds owed to a corporation, organization, beneficiary or person entitled thereto that are presumed to be abandoned under this section shall post a notice entitled "Notice of names of person appearing to be owners of funds held by the Town of Sudbury, and deemed abandoned". The notice shall specify the names of those persons who appear from available information to be entitled to such funds, shall provide a description of the appropriate method for claiming the funds and shall state a deadline for those funds to be claimed; provided, however, that the deadline shall not be less than 60 days after the date the notice was either postmarked or first posted on a website as provided in this section. The treasurer of the city, town or district may post, such notice using either of the following methods: (1) by mailing the notice by first class mail, postage prepaid, to the last known address of the beneficiary or person entitled thereto; or (2) if the city, town or district maintains an official website, by posting the notice conspicuously on the website for not less than 60 days. If the apparent owner fails to respond within 60 days after the mailing or posting of the notice, the treasurer shall cause a notice of the check to be published in a newspaper of general circulation, printed in English, in the county in which the city or town is located.

(d) In the event that funds appearing to be owed to a corporation, organization, beneficiary or person is \$100 or more and the deadline as provided in the notice has passed and no claim for the funds has been made, the treasurer shall cause an additional notice, in substantially the same form as the aforementioned notice, to be published in a newspaper of general circulation in the county in which the city, town or district is located; provided, however, that the notice shall provide an extended deadline beyond which funds shall not be claimed and such deadline shall be at least 1 year from the date of publication of the notice.

(e) Once the final deadline has passed under subsection (d), the funds owed to the corporation, organization, beneficiary or person entitled thereto shall escheat to the city, town or district and the treasurer thereof shall record the funds as revenue in the General Fund of the city, town or district and the city, town or district shall not be liable to the corporation, organization, beneficiary or person for payment of those funds or for the underlying liability for which the funds were originally intended. Upon escheat, the funds shall be available to the city, town or district's appropriating authority for appropriation for any other public purpose. In addition to

the notices required in this section, the treasurer of the city, town or district may initiate any other notices or communications that are directed in good faith toward making final disbursement of the funds to the corporation, organization, beneficiary or person entitled thereto.

Prior to escheat of the funds, the treasurer of the city, town or district shall hear all claims on funds that may arise and if it is clear, based on a preponderance of the evidence available to the treasurer at the time the claim is made, that the claimant is entitled to disbursement of the funds, the treasurer shall disburse funds to the claimant upon receipt by the treasurer of a written indemnification agreement from the claimant wherein the claimant agrees to hold the city, town or district and the treasurer of the city, town or district harmless in the event it is later determined that the claimant was not entitled to receipt of the funds. If it is not clear, based on a preponderance of the evidence before the treasurer at the time of the claim that the claimant is entitled to disbursement of the funds, the treasurer shall segregate the funds into a separate, interest-bearing account and shall notify the claimant of such action within 10 days. A claimant affected by this action may appeal within 20 days after receiving notice thereof to the district, municipal or superior court in the county in which the city, town or district is located. The claimant shall have a trial de novo. A party adversely affected by a decree or order of the district, municipal or superior court may appeal to the appeals court or the supreme judicial court within 20 days from the date of the decree.

If the validity of the claim shall be determined in favor of the claimant or another party, the treasurer shall disburse funds in accordance with the order of the court, including interest accrued. If the validity of the claim is determined to be not in favor of the claimant or another party or if the treasurer does not receive notice that an appeal has been filed within 1 year from the date the claimant was notified that funds were being withheld, then the funds, plus accrued interest, shall escheat to the city, town or district in the manner provided in this section.

If the claimant is domiciled in another state or country and the city, town or district determines that there is no reasonable assurance that the claimant will actually receive the payment provided for in this section in substantially full value, the superior court, in its discretion or upon a petition by the city, town or district, may order that the city, town or district retain the funds; or act on anything relative thereto.

Submitted by the Finance Director.

(Majority vote required)

FINANCE DIRECTOR REPORT: M.G.L Chapter 200A, §9A provides for an alternative procedure for the disposing of abandoned funds, known as Tailings, held in the custody of the Town. Tailings can include uncashed Accounts Payable checks, uncashed Payroll checks, and certain tax overpayments where the property owner cannot be found. Adopting this statute allows for a more efficient and expedited process for the disposing of abandoned funds, allowing the Treasurer to take these funds as revenue into the General Fund after there have been several attempts to notify the check recipient, once one full year has passed since the original issuance. Without adopting this measure, the Town would need to follow the Massachusetts Unclaimed Property Division's annual reporting guidelines, follow their three-year dormancy period, use their due diligence process to notify the recipients, and escheat the funds to the state annually. This measure allows the Town to retain the funds, while also allowing the Treasurer to follow their own timeframe for disposing of Tailings.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 22. ADOPTION OF M.G.L. CHAPTER 59 SECTION 5, CLAUSE 22I:  
COST-OF-LIVING ADJUSTMENT FOR VETERAN’S REAL PROPERTY TAX  
ABATEMENT** *(Consent Calendar)*

To see if the Town will vote to accept the provisions of General Laws Chapter 59, Section 5, Clause 22I as enacted by Chapter 178 of the Acts of 2024, which authorizes an increase in the amount of abatement granted pursuant to General Laws Chapter 59, Section 5, Clause 22, clause 22A, Clause 22B, Clause 22C, Clause 22E and Clause 22F by an amount equal to the increase in the cost of living as determined by the U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index (CPI) for such year as determined by the Commissioner of Revenue, to be effective for applicable exemptions granted for any fiscal year beginning on or after July 1, 2025; or act on anything relative thereto.

Submitted by the Board of Assessors.

(Majority vote required)

BOARD OF ASSESSORS REPORT: Clause 22I of Section 5 of Chapter 59 of the General Laws, if accepted, would increase the amount of the tax abatement granted to veterans on their domiciles pursuant to Clause 22, Clause 22A, Clause 22B, Clause 22C, Clause 22E and Clause 22F annually by a cost-of-living adjustment (COLA) determined by the Department of Revenue (DOR) based on the consumer price index (CPI). This would work like the annual COLA adjustment determined by DOR that is already in place for certain senior exemption amounts. The increases resulting from acceptance of this provision operate cumulatively. Each year’s exemption amount, becomes the base to which the next year’s increase applies. The adoption of this new provision will allow for a gradual increase in the amount of property tax abatement benefit our veterans will receive annually. The FY2025 data indicates the total financial impact to the Town for one year would be just under \$1,500.00, or an additional \$33.00 per applicant on average.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 23. AMEND GENERAL BYLAWS CHAPTER 5, ART. II, SECTIONS 5-3 AND 5-5,  
FINANCE COMMITTEE** *(Consent Calendar)*

To see if the Town will vote to amend Chapter 5, Article II, s.5-3,of the General Bylaws by deleting the text shown in strikethrough and inserting the bolded text as follows:

5.3 Composition and eligibility.

There shall be a Finance Committee consisting of nine ~~legal~~ **registered** voters of the Town, who shall be appointed by the Moderator as hereinafter provided. ~~No elective or appointive Town officer or Town employee shall be eligible to serve on said committee.~~ **Unless provided elsewhere in the Charter or General Bylaws, a member of the Finance Committee shall be precluded from serving on any other Town committee, board or commission, whether elected or appointed. Employees of the Sudbury Public Schools, Lincoln-Sudbury Regional School District or the Town of Sudbury shall be precluded from serving on the Finance Committee.**

5.4 Appointment; term; officers; recordkeeping.

The Moderator shall, at the Annual Town Meeting, appoint sufficient members to the Finance Committee for

*2025 Town of Sudbury ATM Warrant*

such terms of office as will result in a total membership of nine, with the terms of three of the total membership expiring each year. The terms of office of said members shall commence immediately upon qualification and shall expire at the close of final adjournment of the Annual Town Meeting at which their successors are appointed. Said committee shall choose its own officers and shall serve without pay. Said committee shall cause to be kept a true record of its proceedings.

#### 5.5 Vacancies.

The said Committee shall fill any vacancy which may occur in its membership, by vote, attested copy of which shall be sent by the Secretary to the Town Clerk. If any member is absent from five consecutive meeting of said committee, except in case of illness, their position shall be deemed to be vacant **by majority vote of said Committee** and shall be filled as herein provided. The term of office of any person so chosen to fill a vacancy shall expire at the final adjournment of the next succeeding Annual Town Meeting, and the Moderator thereof shall appoint their successor to complete the unexpired term of the member in whose office such vacancy originally occurred.

;or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD REPORT: The Select Board seeks to clarify that residents serving on the Finance Committee are precluded from serving on other boards and committees. This has been the practice and this article seeks to more clearly articulate that practice.

SELECT BOARD POSITION: The Select Board supports this article.

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

### **ARTICLE 24. AMEND GENERAL BYLAWS CHAPTER 11, CAPITAL PLANNING**

To see if the Town will vote to amend General Bylaw Chapter 11, Capital Planning by deleting the text shown in strikethrough and inserting the bolded text in section 11.2 where indicated:

#### 11-1 Establishment; composition; term; membership requirements.

There shall be a committee known as the "Capital Improvement Advisory Committee: (CIAC) composed of seven members: six members appointed by the Select Board and one member appointed by the Finance Committee. The CIAC shall choose its officers annually. The term of office shall be three years, not more than three of which shall expire within the same year. Members of standing boards and committees, as well as Town or school employees shall be precluded from membership on the CIAC. CIAC members may serve on ad-hoc committees created by the Select Board.

#### 11-2 Duties.

The CIAC shall study all capital proposals which involve major tangible items with a total project cost of more than ~~\$100,000 in a single year or over \$200,000 in multiple years~~ **\$500,000** and which would likely require an article at Town Meeting for the project's authorization. The CIAC shall make a report with recommendations to the Finance Committee and the Select Board on these proposals.

#### 11-3 Town Manager Responsibility.

The Sudbury Town Manager shall develop an operating budget for proposed capital expenditures for



the upcoming fiscal year, containing those items whose costs do not meet this threshold and are to be included in the annual budget and financing plans submitted to Town Meeting. The Town Manager shall work with representatives of the Sudbury Public Schools and the Lincoln-Sudbury Regional High School in developing this budget. This capital expenditure budget shall be submitted to the Sudbury Finance Committee at the same time as the budgets of other Sudbury cost centers.

;or act on anything relative thereto.

Submitted by the Select Board

(Majority vote required)

**SELECT BOARD REPORT:** The spending thresholds in the Capital Planning Bylaw have not kept pace with inflation and construction cost escalation. The thresholds were last amended in 2019. This article proposes to replace the two thresholds with a single threshold of \$500,000. For any capital request less than \$500,000, the request would be normally funded within the Town Manager’s Capital Operating Budget and any capital request above \$500,000 would be funded outside of the Town Manager’s Capital Operating Budget, typically as a separate warrant article.

This change would better reflect economic realities since the last bylaw amendment. It would also allow the Capital Improvement Advisory Committee (CIAC) to focus on the larger capital requests that have greater impact on the Town’s finances and its taxpayers.

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

**FINANCE COMMITTEE REPORT:** The Finance Committee does not recommend approval of this article.

**ARTICLE 25. AMEND GENERAL BYLAWS CHAPTER 68, SECTION 68-2 ANNUAL BUSINESS MEETING** *(Consent Calendar)*

To see if the Town will vote to amend General Bylaw, Chapter 68, Section 68-2, Annual Business Meeting, by deleting the text shown in strikethrough and inserting the bolded text:

§ 68-2 Annual Business Meeting.

The Annual Business Meeting shall begin on the first Monday in May at such place as the Select Board shall determine. The Select Board, after a public hearing, may delay the start of the Annual Town Meeting for up to seven days, provided that it acts no later than the last day in February preceding. All sessions of the meeting shall begin at ~~7:30~~ **7:00** p.m. and, unless otherwise voted by 2/3 of those present and voting, shall be adjourned to ~~7:30~~ **7:00** p.m. of the next Monday, Tuesday, or Wednesday, whichever comes first (legal holidays excluded), upon completion of the article under discussion at 10:30 p.m.; except that any such meeting shall be adjourned before that time if a quorum shall be declared to have been lost, or at ~~8:30~~ **8:00** p.m. if a quorum has not been assembled by then.

; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

**SELECT BOARD REPORT:** The Select Board is seeking ways to make Town Meetings more efficient in an effort to attract more participation. This article proposes to change the start time of Town Meetings to 7:00 PM from 7:30 PM and to change the time to declare failure to achieve quorum to 8:00 PM from 8:30 PM. The Board believes these changes, particularly the slightly earlier start time, will facilitate conducting the Town’s

business more expeditiously. A 7:00 PM start time also is consistent with the start time for the majority of municipal boards and committees in Sudbury.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 26: AMEND GENERAL BY LAW CHAPTER 170, SECTION 170-2 WEIGHTS & MEASURES FEES**

To see if the Town will vote to amend General Bylaw Chapter 170, Section 170-2, Sealing weights and measures, by amending certain fees charged by the Town for the sealing of weighing or measuring devices, as described below:

| <b>Device</b>                                   | <b>Current Fee</b> | <b>Proposed Fee</b> |
|---|--------------------|---------------------|
| <b><i>Scales and Balances</i></b>               |                    |                     |
| Over 10,000 lbs.                                | \$100              | \$250               |
| 5,000 lbs. to 10,000 lbs.                       | \$60               | \$150               |
| 1,000 lbs. to 5,000 lbs.                        | \$40               | \$120               |
| 100 lbs. to 1000 lbs.                           | \$30               | \$90                |
| 10 lbs. to 100 lbs.                             | \$20               | \$60                |
| Under 10 lbs.                                   | \$15               | \$45                |
| Weights (all types)                             | \$2                | \$15                |
| <b><i>Measuring Devices</i></b>                 |                    |                     |
| Gasoline pumps/meters                           | \$20               | \$60                |
| Vehicle tank                                    | \$50               | \$120               |
| Bulk storage                                    | \$75               | \$150               |
| Taxi meters                                     | \$25               | \$75                |
| Fabric measures                                 | \$20               | \$60                |
| Cordage measures                                | \$20               | \$60                |
| Linear measures (yardsticks, etc.)              | \$10               | \$30                |
| <b><i>Automated Retail Checkout Systems</i></b> |                    |                     |
| Fewer than 4 units                              | \$75               | \$125               |
| 4 units and not more than 11 units              | \$150              | \$200               |
| More than 11 units                              | \$250              | \$300               |
| <b><i>Other Devices</i></b>                     |                    |                     |
| Bottle/can redeemers                            | \$15               | \$45                |

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER’S REPORT: Fees are charged to offset the cost of providing services. The cost of providing services changes over time and fees need to be adjusted to keep pace with inflation. The Division of Standards, an agency of the Commonwealth of Massachusetts, performs the sealing of weights and measures for Sudbury. The Commonwealth recently increased its charge to the Town, raising the cost from \$3,000 in

2022, to \$7,572 in 2023, to \$8,529 for 2025. In order to offset the cost of the increase, the Administration proposes amending the fees for sealing weights and measures. Town Meeting last revised weights and measures fees in April, 2005. A survey of area communities shows that Sudbury’s fees lag other communities. The proposed adjustment of fees brings Sudbury’s fees more in line with the market and covers the cost charged by the State.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 27. AMEND GENERAL BYLAW CHAPTER 129, SECTION 129-3, THE STRETCH ENERGY CODE, TO ADOPT THE STRETCH ENERGY CODE AND THE SPECIALIZED STRETCH ENERGY CODE**

To see if the Town will vote to amend Chapter 129, section 129-3 of the General Bylaws, entitled State Building Code: Stretch Energy Code for the purpose of regulating the design and construction of buildings for the effective use of energy and reduction of greenhouse gas emission, pursuant to the entirety of 225 CMR 22 and 23, including Appendices RC and CC, including future editions, amendments, or modifications thereto, with an effective date of September 1<sup>st</sup>, 2025, by deleting the existing text and title in its entirety and inserting in its place the following: §129-3 State Building Code: Stretch Energy Code and Specialized Energy Code. The State Building Code is incorporated herein by reference as found in 225 CMR 22 and 23, including Appendices RC and CC, the Specialized Energy Code”, a copy of which is on file with the Town Clerk; or act on anything relative thereto.

Submitted by the Energy and Sustainability Committee

(Majority vote required)

ENERGY AND SUSTAINABILITY COMMITTEE WARRANT REPORT: The purpose of the Specialized Energy Code is to provide a more energy-efficient and low greenhouse gas emissions alternative to the Stretch Energy Code or the baseline Massachusetts Energy Code, applicable to the relevant sections of the State Building Code for new construction. The development of this Specialized Code was required through the 2021 Massachusetts Climate Act, and is expected to help Massachusetts meet its goal of net-zero emissions by 2050. The Specialized Energy Code will have minimal impact on new construction or renovations in our town.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 28. AMEND ZONING BYLAW SECTION 5500 ACCESSORY DWELLING UNITS IN RESIDENCE DISTRICTS AND SECTION 7110 DEFINITIONS AND WORD USAGE**

To see if the Town will vote to amend the Zoning Bylaw Section 7110 Definitions to add a definition of Accessory Dwelling Unit and Section 5500 Accessory Dwelling Units in Residence Districts by deleting the entirety of Section 5500 and replacing it with a new Section 5500 all as printed below:

5500. ACCESSORY DWELLING UNITS (ADU) IN RESIDENCE DISTRICTS

5510. Purpose. The purpose of this bylaw is to increase housing opportunities in Sudbury by allowing

the utilization of the existing housing stock to offer different housing styles reflective of a more diverse population, in terms of age, family size and income. The type of housing allowed under this bylaw may benefit several sectors of the population - current residents whose lifestyles no longer fit into the usefulness of a larger single-family dwelling will be able to supplement their income by renting a portion of their home, and those not capable of home ownership, financially or otherwise, may be able find suitable housing in these units – without substantially altering the appearance of the Town. This type of diverse housing is in accordance with the 2021 Master Plan, the 2005 Community Housing Plan, and the 2024 Affordable Homes Act, and ensures compliance with zoning standards, regulations regarding building design, and requirements of the health, safety, convenience and general welfare of the inhabitants of the Town.

5520. Conditions and Requirements. Notwithstanding anything to the contrary in this Zoning Bylaw, one Accessory Dwelling Unit (ADU) per lot containing a principal dwelling may be constructed as of right in the Single Residence District "A", "C", Wayside Inn Historic Preservation Zone, Limited Business District, or Village Business District subject to the following:

5521. The Accessory Dwelling Unit shall contain no more than 900 square feet, or shall occupy no more than 50% of the gross floor area of the principal dwelling, whichever is smaller. The sum of the areas of all stories of the building of compliant ceiling height pursuant to the Building Code, including basements, lofts, and intermediate floored tiers, measured from the interior faces of exterior walls or from the centerline of walls separating buildings or dwelling units but excluding crawl spaces, garage parking areas, attics, enclosed porches and similar spaces. Where there are multiple Principal Dwellings on the Lot, the GFA of the largest Principal Dwelling shall be used for determining the maximum size of a Protected Use ADU.

5522. An Accessory Dwelling Unit may be built in a detached accessory structure separate from the main dwelling provided: (1) the lot meets the current minimum zoning requirement for lot area in the district in which the lot is located, (2) the detached structure meets the same minimum setback requirements that apply to the principal residence in the district in which the structure is located, and the size of the ADU shall comply with Section 5521.

5523. There will be no more than one Accessory Dwelling Unit per building lot.

5524. Adequate provision will be made for the disposal of sewage, waste and drainage generated by the occupancy of the Accessory Dwelling Unit in accordance with all requirements of the Board of Health, including provision for an appropriate reserve area on-site.

5525. All Accessory Dwelling Units must meet Building Code requirements for egress, fire separation, and fire alarms.

5525A. An attached Accessory Dwelling Unit will be designed so that the appearance of the structure remains that of a single-family dwelling and its associated accessory structures.

5525B. All stairways to an Accessory Dwelling Unit above the first floor must be enclosed within the exterior walls of the structure or on the rear of the dwelling or accessory structure if constructed on an exterior wall, to retain the character and appearance of a single-family home.

5525C. There will be two separate and distinct means of egress from each Accessory Dwelling Unit and each primary dwelling unit. The entrances for individual units should be located as remote as possible from each other or combined into a common vestibule that creates the appearance of a single entrance.

5525D. Where two entrances exist on the front façade of the single-family dwelling, one entrance will appear to be principal entrance and other entrances will be designed to appear to be

secondary, to retain the character and appearance of a single-family home.

5525E. For detached Accessory Dwelling Units the building must appear to be an accessory structure and be architecturally harmonious with that of the primary dwelling, including a similar scale, quality of design, materiality, and proportions of the architectural elements and features.

5526. Off-street Parking. There shall be at least one dedicated off-street parking for the Accessory Dwelling Unit or none if you are within 0.5 miles from a commuter rail station, subway station, ferry terminal, or bus station.

5526A No parking spaces shall be located within the boundary of a street right of way.

5526B In no case shall parking spaces which are more than two spaces deep be considered in computing the required parking.

5526C Parking spaces will be constructed of materials suitable for vehicular hardscape, have vehicular access to, and be directly adjacent to the existing driveway.

5526D New curb cuts or driveway connections to the road are not permitted in conjunction with the creation of an ADU.

5526E Garage spaces may not be used to comply with the provisions of this Section.

5527. It is prohibited for any ADU in the Town of Sudbury to be used as a Short-Term Rental as defined in Section 1 of Chapter 64G of the General Laws.

5530. Reports.

5531. In order to ensure compliance, the applicant shall obtain and submit to the Building Inspector as part of the filing for a Building Permit, a written report of the Board of Health certifying that the conditions of subsection 5524 have been met.

5540. Other Requirements.

5541. Building Permit Required. A Building Permit, or inspection by the Building Department, shall be required to create an Accessory Dwelling Unit.

5542. No Separate Conveyance. The Accessory Dwelling Unit shall remain accessory to a principal dwelling and the ownership of the Accessory Dwelling Unit shall not be conveyed or otherwise transferred separately from the principal dwelling.

5543. Existing Non-conforming lots and structures- To the extent that a finding is required as to any ADU, Section 2400 shall apply provided, that the determination shall not be made by special permit, rather by finding of the Zoning Board of Appeals acting pursuant to G.L. c. 40A, §6.

5550. Existing Special Permits. With respect to structures constituting or containing an Accessory Dwelling Unit for which a Special Permit was obtained at any time prior to 2 February 2025, any unit that meets the criteria of Section 5500, as amended will be considered going forward to be a Protected Use ADU as defined by the Massachusetts Executive Office of Housing and Livable Communities, those units that do not meet the requirements of Section 5500 will be subject to all Conditions of the Special Permit issued for the creation of the ADU, including but not limited to any requirements for renewal or expiration of the Special Permit.

Section 7000 Definitions and word usage

Accessory Dwelling Unit (ADU). A self-contained housing unit, inclusive of sleeping, cooking and sanitary facilities on the same Lot as a Principal Dwelling, subject to otherwise applicable dimensional and parking requirements, that:

- (a) maintains a separate entrance, either directly from the outside or through an entry hall or corridor shared with the Principal Dwelling sufficient to meet the requirements of the state Building Code for safe egress;
- (b) is not larger in Gross Floor Area than ½ the Gross Floor Area of the Principal Dwelling or 900 square feet, whichever is smaller; and
- (c) will not be used as a Short-term Rental as defined in section 1 of chapter 64G.

;or act on anything relative thereto.

Submitted by the Planning Board.

(Majority vote required)

PLANNING BOARD REPORT: In August of last year Governor Healey signed into law the Affordable Homes Act of 2024. As part of this legislation Section 3 of Chapter 40A of the General Laws was amended to make Accessory Dwelling Units (ADUs) a protected use that must be permitted by-right by all municipalities in Massachusetts. The current Section 5500 requires a special permit for the construction of an ADU and would no longer be enforceable. As part of the passage of the statute the Executive Office of Housing and Livable Communities was charged with developing regulations that govern the manner in which municipalities are permitted to regulate ADUs. The Planning Board is proposing the included changes to continue to provide reasonable guidance for the construction of ADUs in conformance with the regulations promulgated by EOHLC.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 29. PURCHASE OF FIRE ENGINE**

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$725,000 or any other sum, for the purchase or acquisition, and equipping of one Fire Engine/Pumper and associated equipment including the payment of all other costs incidental and related thereto: or act on anything relative thereto.

Submitted by the Fire Chief.

(Majority vote required)

FIRE CHIEF'S REPORT: This request would replace the current Fire Engine #1, which was in front line service from 2006 until 2017 at Station 2, and from 2017 to the present assigned to Station 1, Headquarters. Engine #1 is currently 20 years old with 130,000 miles, and is out of service due to safety issues identified during a State safety inspection.

The Fire Department depends on reliable and well-equipped fire apparatus to provide emergency medical services and fire suppression throughout the Town, and to assist other towns when called upon.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 30. AMBULANCE REPLACEMENT**

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$500,000 or any other sum, for the purchase or acquisition and equipping of one new ambulance, including the payment of all other costs incidental and related thereto; or act on anything relative thereto.

Submitted by the Fire Chief: (Two-thirds vote required if borrowed)

FIRE CHIEF REPORT: The Fire Department ALS Ambulance A-3 was purchased in 2015 and currently has 73,000 miles. This unit was the primary ambulance for four years and then placed into reserve. With the change in our operations of running two ALS ambulances, this unit is currently the primary ambulance running out of Fire Station 1, Headquarters. This unit responds to 45% of the EMS related emergencies covering the West and North sections of the Town, along with responding Town-wide for the many incidents. The current time for the delivery of a new ambulance has been quoted at thirty (30) months; the current life extends for an ambulance of seven (7) to ten (10) years.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 31. ROADS, CULVERTS, DRAINAGE, CONSULTANTS & CONSTRUCTION**

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$950,000, or any other sum, for town wide (various locations) roads, culverts, and drains, repair, maintenance, replacement and construction, including all appurtenances thereto, and consultants necessary therefor; 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 replace roads, culverts, associated drain structures and appurtenances at various locations throughout Town. This article will also provide funds to maintain a comprehensive Pavement Management Plan to include multiple surface treatment types like crack sealing, chip sealing, mill and overlay and full-depth reclamation, etc. The Town needs to invest at least \$1.5 million per year to prevent the overall Pavement Condition Index (PCI) from declining. The Town's typical allocations received from the State through the Chapter 90 program is approximately \$730,000. This request is for an additional \$950,000 in funding annually to supplement the monies received from the State Chapter 90 program.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 32. DUMP TRUCK WITH PLOW & SPREADER** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$146,000, or any other sum, for the purchase or acquisition and equipping of a new dump truck with plow and spreader for the Department of Public Works; 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 Dump truck with Plow & Spreader to replace an older model. A new dump truck will provide multiple uses throughout all the divisions within the DPW as well as improve efficiencies. It is a goal of the Public Works to focus on standardizing vehicles and specifying vehicles to better suit our multi-disciplinary needs. These trucks are one of the most used equipment in the fleet. 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. These trucks are also paired with larger equipment to perform snow removal.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 33. 6-WHEEL DUMP TRUCK WITH SLIDE-IN SANDER** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$382,000, or any other sum, for the purchase or acquisition and equipping of a new 6-wheel dump truck with a slide-in sander for the Department of Public Works; 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 Dump Truck 26,000 lb.+, plus HVW Slide in Sander to replace an older model. It is a goal of the Public Works to focus on standardizing vehicles and specifying vehicles to better suit our multi-disciplinary needs. The existing truck is at its useful life-expectancy of about 15 years. 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. These trucks also accompany larger equipment to perform snow removal.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 34. ATKINSON POOL RENOVATION: ADDITIONAL FUNDS**

To see if the Town will vote to raise and appropriate, borrow, or transfer from available funds, a sum or sums, to be expended under the direction of the Town Manager, for the purpose of replacing the existing roofing system, replacing pool mechanical equipment and associated piping, replacing the dive pool skimmers and associated piping, tile repair and re-grouting at the Atkinson Pool including all incidental and related equipment and expenses; or act on anything relative thereto.



Submitted by the Combined Facilities Director.

(Two-thirds vote required, if borrowed)

COMBINED FACILITIES DIRECTOR REPORT: The Atkinson Pool, built in 1987, houses a notarium, pool viewing area, aquatics office, boiler and chemical room. The new Fairbank Community Center has been built and attached to the Atkinson Pool. On the roof of the associated boiler room is a dehumidification unit. The dehumidification unit is responsible to control the humidity and the natatorium interior air quality. The roof and the dehumidification unit have reached the end of their useful life. The boiler room houses the water filtration equipment, the chemicals and associated equipment as well as the boiler equipment. There is insufficient air filtration and the proximity of the chemicals to the boilers creates a corrosive environment and premature failure of the boilers. The pool deck and pool interior tile shows significant deterioration and require isolated tile replacement and full re-grouting. During the construction of the new Fairbank Center it was discovered that the dive pool skimmers are deteriorated and leaking. These skimmers are incased in concrete several feet below the pool deck. Tile repair will be required in this area after the skimmer replacement is completed. At the 2024 Annual Town Meeting the Town authorized \$2,350,000 to fund the request to replace the roof with a solar ready roof, replace the dehumidification unit, separate the chemical and boiler rooms by creating a separate room with adequate ventilation within the boiler/electrical room footprint, repair and re-grout the tile. These additional funds of \$429,000 will be used for the design and installation of additional HVAC duct within the natatorium (Thermaduck), additional pool deck tile repair and re-grouting and the installation of a UV filter System.

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

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

**ARTICLE 35. DPW EMERGENCY OPERATIONS CENTER COST SHARE**

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$125,500, or any other sum or sums, to be contributed to a FEMA earmark grant and expended under the direction of the Combined Facility Director for the purpose of designing the repair and/or replacement and equipping of the DPW Emergency Operations Center, including the payment of all other costs incidental and related thereto; or act on anything relative thereto.

Submitted by the Combined Facility Director.

(Majority vote required)

COMBINED FACILITY DIRECTOR REPORT: Built in 1956, the current Public Works Department General Operations Building acts as its Emergency Operations Center (EOC) during critical emergencies. This current building contains a cramped office space, undersized gathering space, inadequate kitchen/dining area, a single-gender locker area and a single-gender bunk room. These spaces are directly connected to vehicle storage and maintenance garage areas creating a hazard and dangerous risk to the life safety of emergency personnel. The existing facility does not meet the most current building or fire codes, is not ADA complaint and cannot adequately accommodate the needs of emergency personnel.

The Town of Sudbury is expecting to receive a \$500,000 Funding Earmark to construct or rehab a building to house Sudbury's Emergency Operations Center (EOC) administrative office, emergency personnel break areas including dining facilities and bunk area. This Public Works Emergency Operations Space is supportive to the Police and Fire Emergency Operations Center and will provide a redundant operations center should the primary emergency operations space becomes unusable. In order to receive the FEMA funding, the town must provide a 25% match. This funding request is anticipated to be the first of several as the Town embarks on the establishment of an enhanced Public Works Emergency Operations Center that facilitates the future needs of

the Town and the Climate Emergency that is forecasted to present with needs for personnel over an extended period of time.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 36. SCHOOL CLASSROOM INSTRUCTIONAL EQUIPMENT REPLACEMENT** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$100,000, or any other sum, to be expended under the direction of the Sudbury Public School Department for the replacement of School Classroom Instructional Equipment in the Curtis Middle School, Haynes Elementary School, Loring Elementary School, Nixon Elementary School and Noyes Elementary School including incidental and related equipment and expenses associated therewith; or act on anything relative thereto.

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

SCHOOL COMMITTEE REPORT: The article seeks funding for the purpose of purchasing and replacing classroom instructional equipment in twenty (20) total classrooms in all five (5) school buildings. Current equipment is 12-15 years old and have exceeded their useful life.

Sudbury Public Schools positions technology in instructional spaces to support communication and collaboration. The schools provide tools that support student collaboration, differentiation of instruction, and accessibility options for all students.

The District’s standard set of classroom instructional equipment includes 1) an interactive display that provides a visual resource for displaying materials to the entire class with touch components allowing students to interact with educational content using a pen or touch; 2) wireless video projection for teacher mobility around the classroom while also permitting students to project directly from their devices; 3) auditory support for classroom instruction ensuring all students can receive instruction with clarity; and, 4) document cameras allowing for immediate presentation of non-digital resources to the classroom.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 37. ELA CURRICULUM IMPLEMENTATION** *(Consent Calendar)*

To see if the Town will vote to transfer from Free Cash the sum of \$250,720, or any other sum, for the purpose of implementing Expeditionary Learning, the ELA curriculum program recommended by the Elementary English Language Steering Committee to support the purchase of instructional materials, teacher manuals, student resources, professional development, funding for 6-8 grade study committee, and any other associated costs or expenses related thereto; or act on anything relative thereto.

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

SCHOOL COMMITTEE REPORT: Article 17 of the FY23 Town Meeting provided SPS funding for a curriculum update which included robust professional development in research-based instructional practices to ensure consistency in K-5 reading and writing. In addition, the article provided funding for classroom resources, including decodable texts aligned to the updated teaching methodologies.

This article seeks to fund an English/Language Arts Program Implementation for grades K-5, which would provide alignment to MA standards and the 4 shifts in literacy instruction, promote equitable learning environments, contain inclusive texts, and have a high impact on student learning. Following a thorough pilot and evaluation process, the district selected Expeditionary Learning (EL). EL is a nationally renowned academic program receiving many accolades and awards as well as a 96% rating on EdReports, the leader in curriculum analysis and evaluation. With this funding, SPS can launch implementation in all grad K-4 classrooms in FY26 by purchasing the associated EL instructional materials and providing tailored professional development that supports successful implementation. In addition, the article contains funding for a 6-8 study committee.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 38. HVAC CAPITAL IMPROVEMENT ENGINEERING STUDY** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$152,000, or any other sum, to be expended under the direction of the Sudbury Public School Department, to engage in an HVAC existing conditions comprehensive study at all Sudbury elementary and middle schools that will provide conceptual stretch code compliant equipment recommendations, conceptual sustainable/electrification recommendations, and associated cost estimates, as well as future required engineering fee budget estimates; or act on anything relative thereto.

Submitted by the Sudbury School Committee.

(Majority vote required)

SCHOOL COMMITTEE REPORT: The Town recently completed a comprehensive facility condition assessment that identified items that require attention. The new Stretch Code adopted by Sudbury does not allow for simple one-to-one equipment replacements. The facility condition assessment also assumed that the systems were initially designed properly; thus, any pre-existing conditions would remain unknown until a comprehensive equipment study is concluded. The next phase of capital renewal planning requires a comprehensive engineering study which would consist of: engineering review of all existing HVAC plans and list of current complaints; preparation of a list of replacement requirement as per New Stretch Code; and identification of potential alternative selections for electrification/sustainability. Required trades involved in the HVAC engineering study include mechanical engineer, electrical engineer, structural engineer and cost estimator. The study deliverables will include: an existing conditions summary, conceptual Stretch Code compliant equipment selections, conceptual alternative sustainable/ electrification equipment selections, conceptual cost estimate and a engineering fee budget.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 39. FIRE ALARM, EMERGENCY LIGHTING AND BI-DIRECTIONAL AMPLIFICATION SYSTEM DESIGN FEES** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$190,000, or any other sum, to be expended under the direction of the Sudbury Public School Department, for the purpose of designing and cost estimating the fire alarm and emergency lighting system replacements at the Ephraim Curtis Middle School, Josiah Haynes and Israel Loring Elementary Schools and the design and cost estimating of installing bi-directional amplification systems for Peter Noyes and General John Nixon Elementary Schools; or act on anything relative thereto.

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

SCHOOL COMMITTEE REPORT: For the Curtis, Haynes and Loring Schools, the fire alarm and emergency lighting design project will consist of: documentation of the existing fire alarm systems currently installed throughout the middle and elementary schools; design of the proposed voice activated addressable fire alarm system throughout the existing schools; complete Fire Alarm system design throughout the buildings to meet the requirements of NFPA 72 -2013, IBC-2015 International Building Code, 527CMR Massachusetts State Building Code, Life Safety 101.; preparation of Schematic Design Documents consisting of Fire Alarm and Emergency Lighting Drawings as well as a bi-directional amplification narrative and related specification for the proposed systems to allow for contractor bidding and related installation; cost estimating of each system, Stamped drawings, Construction Control Affidavit and Fire Alarm Narrative; Coordination during design and construction with the Owner, to design and implement the necessary support of the above referenced systems; coordination during design with the Town of Sudbury Fire Department to ensure that their requirements are met prior to contractor pricing; Construction support services consisting of contractor question resolution during the pricing stage. Also included in this funding request is the design and cost estimating of a bi-directional amplification system for Noyes and Nixon elementary schools. The bi-directional amplification system will be used by the police and fire departments during an emergency.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 40. HAYNES ELEMENTARY ROOF REPLACEMENT AND REPAIR**

To see if the Town will vote to appropriate, borrow or transfer from available funds, an amount of money to be expended under the direction of the Sudbury School Committee for the replacement and repair of the Josiah Haynes Elementary Roof system located at 169 Haynes Road, Sudbury, MA 01776, which proposed repair project would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program and for which the Town has applied for a school construction grant from the Massachusetts School Building Authority ("MSBA"). The Town acknowledges that the MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and if the MSBA's Board of Directors votes to invite the Town to collaborate with the MSBA on this proposed repair project, any project costs the Town incurs in excess of any grant that may be approved by and received from the MSBA shall be the sole responsibility of the Town.

Submitted by the Sudbury School Committee. (Two-thirds vote required, if borrowed)

SCHOOL COMMITTEE REPORT: The roof on the Josiah Haynes Elementary School building is 26 years old and the District intent is to apply for State funding to offset total project costs of replacing/repairing the roof. The intent of this article is to fund the Haynes Elementary School roof replacement and repair as required by the Massachusetts School Building Authority ("MSBA") in order to qualify for MSBA grant program project reimbursements under the MSBA Accelerated Repair Program ("ARP"). Included in the MSBA grant program process, Sudbury Public Schools submitted a Statement of Interest ("SOI") and the District was invited to participate in the ARP reimbursement process. In accordance with the MSBA process, an SOI should only be filed for a facility where a district has the ability to fund a schematic design within two months of invitation and a total project budget within 12 months of invitation should the district be selected in the MSBA Accelerated Repair Program. The current project estimate for replacing the roof including construction oversight at the Josiah Haynes Elementary School totals \$3,530,000. While the MSBA grant program reimbursement rate is adjusted for a number of factors, the statutory formula starts all districts at a base rate of 31% reimbursement.

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

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

**ARTICLE 41. NIXON ELEMENTARY ROOF REPLACEMENT AND REPAIR**

To see if the Town will vote to appropriate, borrow or transfer from available funds, an amount of money to be expended under the direction of the Sudbury School Committee for the replacement and repair of the General John Nixon Elementary Roof system located at 472 Concord Road, Sudbury, MA 01776, which proposed repair project would materially extend the useful life of the school and preserve an asset that otherwise is capable of supporting the required educational program and for which the Town has applied for a school construction grant from the Massachusetts School Building Authority ("MSBA"). The Town acknowledges that the MSBA's grant program is a non-entitlement, discretionary program based on need, as determined by the MSBA, and if the MSBA's Board of Directors votes to invite the Town to collaborate with the MSBA on this proposed repair project, any project costs the Town incurs in excess of any grant that may be approved by and received from the MSBA shall be the sole responsibility of the Town.

Submitted by the Sudbury School Committee.

(Two-thirds vote required, if borrowed)

SCHOOL COMMITTEE REPORT: The roof on the General John Nixon Elementary School building is 30 years old and the District intent is to apply for State funding to offset total project costs of replacing/repairing the roof. The intent of this article is to fund the Nixon Elementary School roof replacement and repair as required by the Massachusetts School Building Authority ("MSBA") in order to qualify for MSBA grant program project reimbursements under the MSBA Accelerated Repair Program ("ARP"). Included in the MSBA grant program process, Sudbury Public Schools submitted a Statement of Interest ("SOI") and the District was invited to participate in the ARP reimbursement process. In accordance with the MSBA process, an SOI should only be filed for a facility where a district has the ability to fund a schematic design within two months of invitation and a total project budget within 12 months of invitation should the district be selected in the MSBA Accelerated Repair Program. The current project estimate for replacing the roof including construction oversight at the General John Nixon Elementary School totals \$2,755,000. While the MSBA grant program reimbursement rate is adjusted for a number of factors, the statutory formula starts all districts at a base rate of 31%

reimbursement.

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

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

**ARTICLE 42. SUDBURY 250<sup>th</sup> COMMITTEE FUNDS** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate or transfer from available funds a sum or sums to support the Sudbury 250 Committee in commemorating the 250<sup>th</sup> anniversary of the commencement of the American Revolution, which commemoration will extend not later than September 30, 2026, upon which date said Committee shall be dissolved; or act on anything relative thereto.

Submitted by the Select Board. (Majority vote required)

SELECT BOARD REPORT: The Sudbury Select Board established the Sudbury 250 Committee to plan for the commemoration of the 250<sup>th</sup> anniversary of the commencement of the American Revolution. It is anticipated that many of the observances will take place in the early spring through late winter of 2025, although the Committee may plan later events such as the July 4, 2026 observances.

The Committee will:

1. evaluate and make recommendations on how the Town should manage the commemoration of this historic event
2. sponsor activities that commemorate and celebrate the place of Sudbury in the history of our nation
3. ensure that all events are designed to involve and have outreach to all residents of Sudbury.

The Committee shall be dissolved on September 30, 2026, unless continued by a vote of the Select Board.

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

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

**ARTICLE 43. FUNDING OF ACQUISITION OF MBTA BUILDINGS**

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums to be expended under the direction of the Town Manager, for the purpose of funding the acquisition of MBTA real property with the buildings and improvements thereon, known as the Section Tool House and South Sudbury Train Station whether by purchase, lease or otherwise; or act on anything relative thereto.

Submitted by the Town Manager. (Majority vote required)

TOWN MANAGER REPORT: Article 17 of the May 6, 2024 Annual Town Meeting authorized the acquisition of two buildings owned by the Massachusetts Bay Transportation Authority (MBTA) for historic preservation purposes. These buildings are known as the Section Tool House off of Boston Post Road and the South Sudbury Train Station off of Union Avenue. Negotiations are ongoing with the MBTA over the

conveyance of the buildings to the Town. The 2024 vote did not include an appropriation. This article seeks an appropriation to fund the acquisition, if ultimately deemed to be necessary.

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

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

**ARTICLE 44. COMMUNITY PRESERVATION ACT FUND – FAIRBANK COMMUNITY CENTER and HASKELL FIELD LANDSCAPE MASTER PLAN**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$500,000 for Open Space and Recreation purposes under the Community Preservation Act, funded from FY26 Estimated Annual Revenue, and then from CPA Fund Balance or reserves, if needed, to create a Landscape Master Plan (LMP) that will provide a broad framework for the long-term development of Haskell Field and the Fairbank Community Center grounds, and will include the installation of a multi-sport court and Pavilion; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town of Sudbury’s Facility Department in conjunction with the Parks and Recreation Commission and the Parks and Recreation Department seeks funds to hire a qualified design consultant to create a Landscape Master Plan (LMP) that will provide a broad framework for the long-term development of the Fairbank Community Center grounds and adjacent Haskell Field with an emphasis on community collaboration. The goal of the LMP is to develop a design for both spaces that provide a unifying vision for the physical assets of the two parcels including architecture, landscapes, natural areas, parking and circulation that are consistent with and support the Town’s Master Plan framework for the open spaces.

The proposed LMP will delve further into developing the details supporting this vision in terms of civic spaces, recreational activities, streetscapes, landscape concepts, signage, gateways, plant and material pallets that mark its preeminent place in the community. This landscape vision will build upon energy efficient, sustainable universal design concepts developed in the Town’s Master Plan, Open Space and Recreation Plan, Open Space Needs Assessment, ADA Self-Assessment and Transition Plan and operationalize these concepts to landscape policies, projects and priorities.

The selected firm will provide community engagement workshops and focus groups, landscape architecture and civil engineering design services, cost estimating, and policy planning for the LMP. Items deemed to be a priority based on operational need will be considered early action items. Preliminary estimates of specific amenities that are included in this list are funds for a second multi-sport court and Pavilion. Accessible pathways, electrical upgrades and data considerations are included within these specific early action item estimates. The remaining funding request is for the design and cost estimating effort.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee does not recommend approval of this article.

**ARTICLE 45. COMMUNITY PRESERVATION ACT FUND – RESTORING WATER QUALITY IN HOP BROOK**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$90,000 for Open Space and Recreation purposes under the Community Preservation Act from FY26 CPA Estimated Annual Revenue and then from the CPA Fund balance or reserves, if needed, as a grant to the Hop Brook Protection Association for the purpose of remediating/removing water chestnuts and other invasive species from the Hop Brook pond system and to authorize the Select Board to enter into a grant agreement on such terms and conditions as it deems appropriate; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: Hop Brook is the largest tributary of the Sudbury River, and drains more than half of the land area of Sudbury. Dozens of homes, recreational and historical areas, Town wells and Town property are along this waterway and associated ponds. Until the 1970s, Hop Brook was a major recreational and natural asset - with multiple locations for swimming, fishing, ice skating and canoeing, and supported a diverse ecosystem with many species of birds and fish. Recorded Sudbury history features activities along Hop Brook since the 1700s, including fishing, saw and grain mills, canoeing, and swimming. However, nutrient pollution – primarily from the Marlborough Easterly wastewater treatment plant - has caused severe degradation of water quality, and overgrowth of invasive plants and toxic algae. As a result, the Hop Brook waterway and associated ponds become very unpleasant in the summer, are no longer attractive for recreational use, and require increasingly intensive management to reduce unwanted plants.

The goal of this project is to retain a consultant to create a Watershed-based plan (WBP) to restore water quality in the Hop Brook watershed, and thus reclaim an important recreational and historical asset for all Sudbury citizens. The Hop Brook Protection Association (HBPA) has collected extensive data on sources and variations in pollutant levels throughout Hop Brook, and has collaborated extensively with scientists at OARS (Organization for the Assabet, Sudbury and Concord Rivers) to better understand how these pollutants, especially phosphorus, created the current situation. OARS has completed an in-depth evaluation that is available upon request.

A watershed-based plan (WBP) is a necessary step in assembling and evaluating the existing data with the purpose of determining what approaches are most likely to successfully restore acceptable water quality. A well-developed WBP is also necessary to obtain Federal (Section 319) and state grant funding for specific remediation strategies (such as the ones recommended by the WBP). Framingham, Westboro, Andover and other towns have used their WBPs to successfully obtain government funding that ultimately led to pollution reduction and improved water quality (examples can be provided upon request).

The Hop Brook Protection Association, in partnership with the Sudbury Conservation Coordinator and OARS, is well-prepared to successfully manage the process to produce an optimal WBP. Over the past three years, the HBPA has developed and managed a successful program to reduce invasive water chestnut plants, and has partnered with OARS and the Sudbury Conservation Commission to obtain two grants that supported water quality sampling and community education.

Under the auspices of a prior grant, the HPPA hired a consultant and worked with them through the early stages of the watershed-based plan development process. This work included multiple site visits, analysis of 40+ years of archived data, and development and refining initial models for nutrient sources and flow.

However, because the HBPA, OARS and the consultant could not agree on the next course of action, the HBPA stopped watershed-based plan development, and plans to spend 2024, and possibly 2025, collecting and analyzing data. For this project the HBPA has engaged OARS to take the lead in data collection and analysis,



supported by HBPA volunteer efforts for sampling and related tasks. After this process is completed, the HBPA will restart the watershed-based plan with the same or a different consultant. Because of the elapsed time and possible change of direction, the new WBP will have to start from the beginning.

The original grant is insufficient to fund our current plan, and so the request is for a supplemental grant of \$90,000 to complete the WBP.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 46. COMMUNITY PRESERVATION ACT FUND –  
SUDBURY HOUSING AUTHORITY ALLOCATION**

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$450,000 from the category of Community Housing of the Community Preservation Act, funded from FY26 Estimated Annual Revenue and then from CPA Fund balance or reserves, if needed, for the purpose of the creation of additional affordable housing units at 21 Great Lake Drive, 8 Oakwood Avenue, 2 Beechwood Avenue and 9 Richard Avenue 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 Sudbury Housing Authority (SHA) for the acquisition, creation, preservation and support of community housing. The SHA intends to use the funds for the redevelopment of four single-family homes in its portfolio: 21 Great Lake Drive, 8 Oakwood Avenue, 2 Beechwood Avenue and 9 Richard Avenue.

Prompted by the need for smaller units in its inventory, SHA opted in 2021 to study its options for redevelopment of its properties. SHA hired an engineering firm, Hancock Survey Associates (Hancock), and an affordable housing consultant, the Cambridge Housing Authority (CHA). Both firms worked under the direction and supervision of the SHA Board and staff.

The project team conducted a successful concept phase of design and predevelopment. After all the financing is secured and building permits obtained, the project team proposes to demolish the single-family homes and reconstruct duplexes. The SHA has experience with this model as it used CPA funds awarded in 2008 to build 5 duplexes on the sites of single-family homes it owned. Those duplexes were successfully completed in 2012. The new homes will be energy efficient and sized to accommodate the families on the SHA's waiting list. Most of the applicants are looking for smaller homes with one, two or three bedrooms, as opposed to the existing larger homes.

An RFP issued in December, 2024 seeking architects with experience designing affordable and multifamily housing and with experience designing homes that seamlessly integrate housing within the existing residential setting. SHA intends that the design selected blends into the neighborhood.

The total development cost of the project is \$4.18M, with over \$1.94M already secured. The SHA was honored to be one of three housing authorities in the state to be awarded a grant of \$1.2 M in funds for construction of the new homes, along with four vouchers that will allow the properties to be self-sustaining. The current funding from the CPA, in addition to previous CPA allocations to the SHA, have leveraged this state funding which will also be supplemented by a mortgage to be held by the SHA.

SELECT BOARD POSITION: The Select Board does not support this article.

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

**ARTICLE 47. COMMUNITY PRESERVATION ACT FUND – SUDBURY**  
**HOUSING TRUST ALLOCATION** *((Consent Calendar))*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$690,000 for community housing purposes under the Community Preservation Act from FY26 CPA Estimated Annual Revenues and then from the CPA Fund Balance or reserves, if needed, to the Sudbury Housing Trust for the acquisition, creation, preservation, and support of community housing as permitted by the Community Preservation Act; or act on anything relative thereto.

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

COMMUNITY PRESERVATION COMMITTEE REPORT: The Sudbury Housing Trust requests Community Preservation Act (CPA) funding to support the acquisition, creation, preservation and support of affordable homeownership units of housing.

The purpose of the Sudbury Housing Trust is to provide for the creation and preservation of affordable housing in the Town of Sudbury for the benefit of low and moderate income households. The Trust implements the recommendations set forth in the Housing Production Plan by aiding the Town of Sudbury, private enterprises, nonprofit organizations, and other public agencies in the orderly acquisition, creation, preservation, construction, financing or refinancing of property within the Town of Sudbury so that such property will be available as residential property for low and moderate income persons and to provide mechanisms to ensure such use.

These funds will augment previously allocated funds to support community housing through the provision of grants, loans, rental assistance, security deposits, interest-rate write downs, or other forms of assistance for the purpose of making housing affordable.

This CPA funding request would also enable the Trust to bring new units of affordable housing to Sudbury's existing inventory. This could be through the Trust's Home Preservation Program which converts existing smaller, market rate homes to affordable homes and provides affordable homeownership opportunities to income eligible households. The Trust is the only entity whose mission is to create affordable homeownership units in Sudbury. Through this program, the Trust has seen tenants renting from the Sudbury Housing Authority become homeowners. In other instances, owners of deed restricted properties have been able to purchase market rate homes in town. These demonstrate first-hand the benefits of a homeownership program. Sudbury has 37 ownership units in its affordable housing portfolio; a number which has stayed constant since 2016. The nine-year hiatus will end with new affordable units created from the funds requested.

The Sudbury Housing Trust's Home Preservation Program correlates precisely to CPA eligible activities in the category of community housing. It conforms to the Town's Housing Production Plan, contributes long-term affordability towards the 10% Chapter 40B threshold, converts market rate units to 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 48. COMMUNITY PRESERVATION FUND – HOSMER HOUSE COLLECTION**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$119,500 from the category of Historic Resources of the Community Preservation Act, funded from Historic Reserves, and then from FY26 Estimated Annual Revenue, and then from CPA Fund Balance or reserves, if needed, to preserve, protect and catalog the art and other documents in the Hosmer House; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Hosmer House was gifted to the Town of Sudbury by its last owner, artist Florence Ames Hosmer. Following her death in 1978, the town took possession of the property that had originally been acquired in 1897 by her parents, the Rev. Edwin Barrett Hosmer and his wife, Abbie Louisa Ames. Hosmer House is a unique historic resource because the contents of house were also bequeathed to the town – the Hosmer family’s possessions, which include Ms. Hosmer’s paintings and varied household contents – such as furniture, books, farming implements, art supplies, textiles and costume, ceramics and glass, silver, photographs, manuscripts, letters and other archival materials. Hosmer House with its historical house collection reflects a family’s life in Sudbury and provides an opportunity for an historical interpretation of Sudbury. Most publicly owned historic houses are empty and do not contain the possessions of former residents. Hosmer House is a rare exception as it contains the historical collection of the Hosmer’s possessions.

In 2023 Town Meeting approved CPA funding for the Historical Commission to conduct two Hosmer House historic preservation projects as recommended in the 2021 Sudbury Town-wide Historic Preservation Plan: 1) a combined Hosmer House Historic Structure Report/Cultural Landscape Report, and 2) a Hosmer House Collection Study of the house’s historical contents. Both studies were commenced in early spring 2024 and completed in December, 2024. The Hosmer House Collection Study is the first initiative of its kind in Hosmer House history to look and assess across all of the Hosmer House collections in order to develop a broad reaching and comprehensive set of priorities and recommended action items.

The Historical Commission seeks CPA funding to implement the high priority recommendations for the protection and preservation of the Hosmer House Collection, and in particular, historical family papers, manuscript materials and photographs, and for overall management of the breadth of the collection including the development of a professional Collection Management Policy Plan outlining processes to affect its protection and preservation. The project will be the first phase in implementing the Collection Study’s recommendations.

This Project will include:

- Triage Archivist and offsite storage for primary source materials.
- Light control: Preventative Conservation.
- Strategic Plan for Sustainable Hosmer House governance models.
- Collection Management Policy Plan Task: Create a CMP for the Hosmer House Collection.

These tasks will be conducted by qualified professional specialists in their respective subject fields and may be conducted concurrently.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 49. COMMUNITY PRESERVATION ACT FUND - HOSMER HOUSE ENVELOPE, HEATING, VENTILATION & AIR CONDITIONING** (Consent Calendar)

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$640,000 from the category of Historic Resources of the Community Preservation Act, funded from Historic Reserves, and then from FY26 Estimated Annual Revenue, and then from CPA Fund Balance or reserves, if needed, to replace the deteriorated wooden clapboards and trim, any rotten infrastructure, as well as the design and installation of a heating, ventilation & air conditioning system; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Hosmer House, built in 1793 and bequeathed to the Town of Sudbury in 1959, currently has a diminished exterior (the envelope). There is rotting trim, clap boards, fascia, missing and damaged shutters, as well as deteriorated brick walls, which have resulted in water intrusion into the house. The Hosmer House has not been the beneficiary of a coordinated, systemic approach to exterior repair in approximately 20 years or longer; any repairs have been largely “piecemeal.” This CPC funding request is to restore, repair or replace the deteriorated envelope as well as explore improvements to enhance and upgrade the HVAC system to control the air quality, temperature and humidity within the house.

This project stems from the analysis of the Hosmer House that was performed by the Architectural Preservation Studio, DPC (APS). This analysis was funded by a CPC grant made in May, 2023 to retain professional consultants to assess the current historical structural conditions of the Hosmer House and its landscape and grounds. APS was retained by the Town of Sudbury in February, 2024 to develop a combined Historic Structure Report and a Cultural Landscape Report.

APS spent the year inspecting all aspects of the House and by the end of the year, APS produced a 511 page report documenting the history of the building, the existing conditions, a written building conditions assessment, and building recommendations with a cost estimate. APS submitted a detailed cost estimate of the work to be done broken into phases including immediate (highest priority) repairs, 1 to 5 year repairs, and 5+ year repairs. The deficiencies observed concerning the clapboard and decorative wood cladding elements, brick, and mortar on the house mainly relate to deferred maintenance, inadequate flashing systems, water infiltration and materials reaching the end of their normal life cycle.

This request is for items included in the first two phases including assessing and exploring upgrades to the existing heating, ventilation and air conditioning system, repairing the exterior clapboards and brick masonry, and repairing, replacing or restoring the windows, shutters and doors. The Hosmer House is located in Town Center; it is listed on the both the State and National Registry of Historic Places. It is a “living” house museum. The Hosmer House is unique in that it contains the furnishings, belongings, papers and so forth of the Hosmer family who occupied the house for close to 100 years, prior to the donation of the house by Florence Hosmer to the Town of Sudbury. These efforts to repair the envelope will preserve the Hosmer House for the enjoyment of current and future generations.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 50. COMMUNITY PRESERVATION ACT FUND - HOSMER HOUSE**  
**WOODEN ROOF**

*Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$386,000 from the category of Historic Resources of the Community Preservation Act, funded from Historic Reserves, and then from FY26 Estimated Annual Revenue, and then from CPA Fund Balance or reserves, if needed, to replace the currently failing asphalt roof on the Hosmer House with a historically accurate wooden roof; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Hosmer House, built in 1793 and bequeathed to the Town of Sudbury in 1959, currently has a failing 32+ and 22+ year old non-historic three-tab asphalt roof system that is well past the end of its life. A 2004 Hosmer House structural assessment had recommended the Hosmer House roof be replaced by 2014. The roof has occasionally been patched, and on at least one occasion, an entire set of shingles had blown off. The goal of the roof and gutter replacement, and associated chimney repair and flashing is to replace the failing roof system with a historically appropriate roof that will ultimately to prevent water intrusion into the house. In addition, the roof and gutters will mitigate water infiltration by efficiently removing water and precipitation away from the sides and foundation of the house. Moisture penetration and improper maintenance are the most common contributors to the deterioration of wood exteriors and brick masonry; the Hosmer House prominently features both.

This CPC funding request is to remove the asphalt roof from the structure in its entirety and replace it with an historically correct cedar shingle roof assembly which will include water barriers, roof insulation, copper flashing, copper drip edge, copper gutters and copper downspouts. This request will also include the repointing of the chimneys as needed to provide a watertight roofing system.

The amount of the request is based on an estimate from SOCOTEC AE Consulting, LLC in August, 2024 with a modest contingency. The proposal has the strong support of the Sudbury Historic Districts Commission which is charged with maintaining the architectural integrity of Sudbury's local historic districts which includes the Town Center Historic District which includes the Hosmer House. In its letter of support, the HDC wrote, "Sudbury's historic character is central to its identity and quality of life, and the historic resources under the Town's care are of particular significance. The Hosmer House is one of Sudbury's most visible and prominent properties. As stated in the CPC-funded Community-Wide Historic Preservation Plan (2022), *"the Town of Sudbury should be a model in the stewardship of its historic buildings and landscapes and an example of what is expected of the private and non-profit sectors."* By installing a period-appropriate wood shingle roof, the Hosmer House would join the list of other prominent, historic buildings with traditional roofing materials in Sudbury, including the Loring Parsonage (Town-owned), Town Hall (Town-owned), and the Wayside Inn. The current three-tab asphalt shingles are not period-appropriate and would likely not be approved by the Historic Districts Commission if presented under a new application today. The Sudbury HDC discourages the use of three-tab shingles due to their simpler and more utilitarian appearance, and do not consider them compatible with the traditional architectural styles found in Sudbury."

The Historic Districts Commission supports the Town's efforts to restore the Hosmer House to a more historic, original appearance and take steps to help protect the longevity of the building for the future.

The Hosmer House is listed on both the State and National Registries of Historic Places.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 51. COMMUNITY PRESERVATION ACT 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 \$43,000 for Community Housing purposes under the Community Preservation Act, funded from FY26 CPA Estimated Annual Revenue and then from the CPA Fund Balance or reserves, if needed, for the purpose of supporting and creating community housing by funding of the Town’s portion of the FY26 Regional Housing Services Office (RHSO) membership fee; 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 number of dwelling units. Falling short of that number, as Sudbury had in the past, allows developers to both site and design partially affordable developments with extreme limitations on the Town’s zoning and development requirements, and design oversights. There are a great number of administrative requirements to monitor and certify this approved inventory and to maintain those certifications going forward.

Since 2011, the Town has contracted with the Regional Housing Services Office (RHSO) to provide services to the Town including affordable housing inventory monitoring; supervising lotteries to determine qualifications for affordable housing; monitoring the Incentive Senior Developments 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 the Executive Office of Housing and Livable Communities 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. This Article requests funding to continue to contract with the RHSO for these services.

The amount of this request includes a one-time one year increase of \$10,000 to onboard a new Director of RHSO.

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 52. COMMUNITY PRESERVATION ACT FUND – REVERSION OF UNSPENT FUNDS** (Consent Calendar)

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

2023 ATM, Article 41 - Sudbury Housing Trust – Nobscot Allocation - \$425,345.85 to be reverted to the category of undesignated.

;or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This project is completed at this time or will not proceed further. In order to return the funds to the Community Preservation Act general account, an affirmative vote of Town Meeting on this article is necessary.

SELECT BOARD REPORT: The Select Board supports this article.

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

**ARTICLE 53. COMMUNITY PRESERVATION ACT 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, funded from FY26 CPA Estimated Annual Revenue and then from the CPA Fund Balance or reserves, as recommended by the Community Preservation Committee, for the FY26 Community Preservation Act budget, including the administrative expenses and all other necessary and proper expenses of the Community Preservation Committee for FY26, amounts for payment of debt service on the Community Preservation Act projects previously appropriated 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 FY2026 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 FY2026 is \$3,240,000. The article appropriates funds for FY2026 debt service obligations totaling \$628,943. These obligations arise from prior Town Meeting approval for the bonding of three projects:

- 1) Purchase of development rights on the Nobscot Boy Scout Reservation Phases I and II utilizing the Open Space and Recreation (\$375,975) category;
- 2) Purchase of development rights on Pantry Brook Farm utilizing the Open Space and Recreation (\$187,843) category; and
- 3) Purchase of the Johnson Farm Property utilizing the Open Space and Recreation (\$65,125) category.

The article also appropriates funds for administrative and operational expenses of the Community Preservation Committee in the amount of \$118,050. 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 \$162,000 based upon the projected FY2026 revenue of \$3,240,000. 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 REPORT: The Select Board supports this article.

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

**ARTICLE 54. DECREASE CPA SURCHARGE**

To see if the Town will vote to decrease the surcharge imposed under Massachusetts General Law Chapter 44B, otherwise known as the Community Preservation Act, from 3%, as voted by the April 4, 2001 Annual Town Meeting, to 1 1/2%.

Submitted by Petition.

(Majority vote required)

PETITIONER'S REPORT: Petitioner will report at the Annual Town Meeting.

SELECT BOARD POSITION: The Select Board does not support this article.

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

**ARTICLE 55. MEANS TESTED SENIOR TAX EXEMPTION AMENDMENT  
& SPECIAL ACT**

To see if the town will vote to authorize the Select Board to petition the General Court for a Special Act to amend the provisions of Chapter 169 of the Acts of 2012 as amended by Chapter 10 of the Acts of 2016 as follows:

1. In SECTION 5. Replace the word "Acceptance" with the phrase "Restarting or acceptance of an amending Act."
2. Replace in SECTION 6. The word "revoked" with the word "paused" and the twice appearing word "revocation" with the word "pausing".
3. Revise in SECTION 8 (as revised by Chapter 10 the Acts of 2016)
  - a. In subsection (a) Delete the phrase ", between January 2 and June 29 in the year 2018 and" and the word "thereafter"; and Replace the word "expired" with the word "paused".



b. In subsection (c) Replace the word “expire” with “be paused until such time as town meeting votes to restart it for another three-year term”.

c. Add a new subsection (d) as follows

(d) “If paused the act may be restarted by a subsequent vote of town meeting on the question as phrased in subsection (a) above replacing the word “extended” with “restarted and extended”.

;or act on anything thereto.

Submitted by Petition.

(Majority vote required)

PETITIONERS REPORT: After 12 years of implementation the Sudbury Means Tested Senior Exemption has become widely accepted as good for Sudbury as it enables many low & moderate income senior citizens to be able to remain in their homes while still contributing to the taxes that educate their generally more affluent neighbors’ children.

The enabling legislation for this exemption has an important inconsistency and a clear shortcoming: it took a majority vote at a town election for its implementation (s.5) or revocation (s.6). Town meeting is required every three years to continue the exemption (s.8(a)), but a single failure to extend the exemption would cause the enabling act to expire (s.8(c)) without any possible action by town meeting or Sudbury voters at an election to revive the exemption. The enabling act’s expiration or revocation would require new state legislation to enable Sudbury to restart the exemption.

These amendments are designed provide a more balanced approach to these Sudbury decisions. A town meeting vote should not be able to preclude restarting the exemption by a subsequent town meeting vote. An election where Sudbury voters decided to begin the exemption needs to be paired with an election that decides to suspend town meetings’ ability to extend or restart the exemption. And finally, all these decisions should become Sudbury decisions not requiring further state legislation.

Relevant Existing Text of the Sudbury Means Tested Exemption

(Proposed changed words are underlined)

Section 5 and 6 of chapter 169 of the acts of 2012

SECTION 5. Acceptance of this act by the town of Sudbury shall be by an affirmative vote of a majority of the voters at any regular or special election at which the question of acceptance is placed on the ballot.

Sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote by the town.

SECTION 6. This act may be revoked by an affirmative vote of a majority of the voters at any regular or special town election at which the question of revocation is placed on the ballot. Revocation of sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote by the town.

Section 8 as amended by chapter 10 the acts of 2016:

SECTION 8.

(a) The town meeting of the town of Sudbury shall, between January 2 and June 29 in the year 2018 and every 3 calendar years thereafter, provided that this act has not sooner expired pursuant to subsection (c), vote on the following question:

“Shall an act passed in the general court in the year 2012 entitled, ‘An act authorizing the town of Sudbury to establish a means tested senior citizen property tax exemption’ be extended for another 3 years?”

(b) If any vote taken at town meeting pursuant to subsection (a) is in the affirmative then this act shall continue in effect.

(c) If any vote taken at town meeting pursuant to subsection (a) is in the negative then this act shall expire.

Relevant **Proposed Revised** Text of the Sudbury Means Tested Exemption

(The amended text is underlined and italicized)

Section 5 and 6 of chapter 169 of the acts of 2012

SECTION 5. *Restarting or acceptance of an amending act* by the town of Sudbury shall be by an affirmative vote of a majority of the voters at any regular or special election at which the question of acceptance is placed on the ballot. Sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote by the town.

SECTION 6. This act may be *paused* by an affirmative vote of a majority of the voters at any regular or special town election at which the question of *pausing* is placed on the ballot. *Pausing* of sections 1 to 4, inclusive, and sections 7 and 8 shall take effect 30 days after an affirmative vote by the town.

Section 8 as amended by chapter 10 the acts of 2016:

SECTION 8.

(a) The town meeting of the town of Sudbury shall every 3 calendar years, provided that this act has not sooner *paused* pursuant to subsection (c), vote on the following question:

“Shall an act passed in the general court in the year 2012 entitled, ‘An act authorizing the town of Sudbury to establish a means tested senior citizen property tax exemption’ be extended for another 3 years?”

(b) If any vote taken at town meeting pursuant to subsection (a) is in the affirmative then this act shall continue in effect.

(c) If any vote taken at town meeting pursuant to subsection (a) is in the negative then this act shall *be paused until such time as town meeting votes to restart it for another three-year term.*

*(d) if paused this act may be restarted by a subsequent vote of town meeting on the question as phrased in subsection (a) above using the words “restarted and extended” instead of the word “extended”.*

SELECT BOARD POSITION: The Select Board supports this article.

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

**ARTICLE 56. 10 YEAR PLAN TO FUND & CONSTRUCT WALKWAYS ALONG SUDBURY’S MAIN THRU ROADS**

To see if the town will vote to raise and appropriate the sum of 1% of real estate taxes to be raised over the next ten (10) years (approximately \$11.8 million) to be expended on the construction of new town walkways along Sudbury's major thru roads, connections to Sudbury rail trails, and public schools, either on the road's public right of ways, or on Easements granted to Sudbury on a voluntary basis, or on necessary easements acquired by the Select Board thru eminent domain; such sum to be spent as said 1% is raised during the next 10 years term to reduce the expense of said short term debt; Such sums to be expended under the direction of the Town Manager, and for all incidental and related contract expenses, including but not limited to professional, design, engineering, and project management services, preparation of plans, specifications, and bidding documents, borrowing costs; and further, to authorize the Treasurer, with the approval of the SELECT BOARD, to issue short term notes of the Town, as necessary, in accordance with General Laws Chapter 44, Section 7, or any other

enabling authority; and further, to authorize the Town Manager with the approval of the SELECT BOARD to enter into such contracts to carry out the purposes of said vote in accordance with any enabling authority; provided, however, that the vote taken hereunder shall be expressly contingent upon approval by the voters at an election of a Proposition 2 1/2, so-called, debt exclusion established by General Laws Chapter 59, Section 21C, allowing Sudbury to raise a 1% surcharge on real estate taxes for the 10 fiscal years following approval of said debt exclusion, or act on anything thereto.

Submitted by Petition.

(Majority vote required)

**PETITIONER’S REPORT:** This article does one simple thing: it creates 10 year funding for walkway construction which for the average Sudbury single family house (\$1.122 million) costs 45 cents/day. This 45 cent daily temporary surcharge will create slightly over \$1 million per year dedicated solely to walkway design and construction. It cannot be used for anything else!

Since the mid 1970's Sudbury has constructed many walkways, yet 50 years later significant portions of Sudbury's essential walkway network remain unfunded and unbuilt. These include:

1. Portions or all of major busy thru roads, such as: Concord from Thompson Drive to Twin Pond Lane, Pantry, Dakin, Haynes, Marlboro, New Bridge, and Lincoln roads etc.
2. Connecting walkways to streets & neighborhoods unable to safely walk or bike to
  - a. Nearby rail trails
  - b. Nearby public school
  - c. Nearby public conservation land with their many walking trails
  - d. Nearby parks, playgrounds and sports facilities

At the 2015 Town Meeting, discussion on Article 53, it was noted that a major difficulty in designing and constructing walkways is the need for easements over private property. Town policy passes the responsibility for obtaining easements to residents and neighbors along the proposed walkways. In some case along major roads, examples include Concord Rd, where a single land owner's refusal to grant an easement stopped a planned walkway to the north of Thompson drive.

For other reason, including lack of CPC funding, and departmental priorities, little progress has occurred in the last decade.

After 50+ years, it's time to renew Sudbury's commitment to finishing the job. This article is designed to kick start this effort by providing 10 years of steady funding.

1. To secure voluntary easements from all relevant owners of land adjacent to major roads without walkways.
2. To authorize the Select Board take land or an easement by eminent domain when necessary.
3. To fund the Design and construction of necessary walkways.

**SELECT BOARD POSITION:** The Select Board does not support this article.

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

**TOWN COUNSEL OPINIONS**

It is the opinion of Town Counsel that, if the Bylaw amendments proposed in the following article in the Warrant for the 2025 Annual Town Meeting are properly moved, seconded and adopted by a majority vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Bylaw:

- Article 23. Amend General Bylaw Chapter 5, Art. II, Sections 5-3 and 5-5 Finance Committee
- Article 24. Amend General Bylaw Chapter 11, Capital Planning
- Article 25. Amend General Bylaw Chapter 68, Section 68-2 Annual Business Meeting
- Article 26. Amend General Bylaw Chapter 170, Section 170-2 Weights & Measures Fees
- Article 27. Amend General Bylaw Chapter 129, Section 129-3, The Stretch energy Code and the Specialized Stretch Energy code

It is the opinion of Town Counsel that, if the Zoning Bylaw amendment proposed in the following article in the Warrant for the 2025 Annual Town Meeting is properly moved, seconded and adopted by a majority vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Zoning Bylaw:

- Article 28. Amend Zoning Bylaw Section 5500 Accessory Dwelling Units in Residence Districts and Section 7110 Definitions and Word Usage

---

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 1st day of April, 2025.

SELECT BOARD OF SUDBURY:

Jennifer S. Roberts

Daniel E. Carty

Janie W. Dretler

Lisa V. Kouchakdjian

Charles G. Russo

## Part II FINANCE SECTION

### Contents

|   |    |
|---|----|
| <b>Finance Committee Budget Report</b> .....  | 2  |
| Town Meeting Warrant Data Summary .....   | 10 |
| Articles with Finance Committee Recommendations .....   | 11 |
| Estimated Impact on FY26 Residential Tax Bill .....   | 13 |
| How the Residential Tax Rate is Calculated.....   | 14 |
| General Fund Budget Summary of Revenues & Expenditures .....  | 16 |
| Town Operating Budget Detail .....  | 18 |
| Capital Budget.....   | 19 |
| Enterprise Funds Budget.....  | 20 |
| Community Preservation Funds Budget .....   | 21 |
| Long-Term Debt by Project.....  | 22 |
| Long-Term Debt Maturity Dates.....  | 23 |
| LS Regional High School Outstanding Debt .....  | 24 |
| Historical Context .....  | 25 |
| Revenue by Source (FY2017 – FY2026).....  | 26 |
| Assessed Values by Property Class (FY2016 – FY2025) .....   | 27 |
| Property Tax Rates by Property Class (FY2016 – FY2025) .....  | 27 |
| Estimated Rate of Increase of Residential Tax Rate as it Appears on Average Residence Tax Bill (FY2017 – FY2026)..... | 28 |
| New Growth and Rate of increase of Total Tax Levy Adjusted for the Effect of New Growth (FY2017 – FY2026) .....       | 28 |
| Community Preservation Fund Revenue (FY2017 – FY2026) .....   | 29 |
| Additional Information .....  | 30 |
| Collective Bargaining.....  | 30 |
| Budget Terms and Definitions .....  | 32 |

**NOTE:** If you have suggestions for the Finance Committee (“FinCom”) section of the warrant, please send your suggestions to [FinCom@sudbury.ma.us](mailto: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/>.

## Finance Committee Budget Report

The Finance Committee (“FinCom”) provides its Budget Report and accompanying information to assist residents in understanding Sudbury’s budget for fiscal year 2026 (“FY26,” the period from July 1, 2025 to June 30, 2026) and the related financial articles that will be presented at Town Meeting.

The mission of the FinCom is to make recommendations to Town Meeting on the annual budget and any other finance-related warrant articles. To achieve this mission, FinCom 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 Sudbury Public Schools (“SPS”) and Lincoln-Sudbury Regional High School (“LSRHS”), and others, as needed for the purpose of gathering 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 the Finance Director’s calculations as of March 31, 2025, unless otherwise noted, and in certain cases are approximations to explain the budget concisely. We provide links to detailed budgets for each cost center in the respective sections of this report. Please refer to the actual warrant articles that will be voted for exact amounts.

## Summary and Recommendations

**Operating Budget:** There are three cost centers that make up the majority of the Operating Budget (Article 3): SPS; LSRHS; and the Town Departments.

FinCom worked collaboratively with the three cost centers to analyze their budgets in detail, in particular examining those line items that are most material or that generate budget pressure.

FinCom recommends approval of the FY26 Operating Budget, for the reasons set forth below.

**Capital Budget:** The Town presents a Capital Budget of \$11,454,120, consisting of:

- The Town Manager’s Capital Budget (Article 4), in the amount of \$1,219,400 from the tax levy;
- Eight Warrant Articles totaling \$2,920,720 from free cash,
- One Warrant Article in the amount of \$100,000 from the tax levy; and
- Four Warrant Articles to be financed by debt:

- Ambulance Replacement – \$500,000 (in-levy debt offset by transfer from Ambulance Fund)
- Atkinson Pool Renovation Supplemental Funds - \$429,000 (in-levy debt)
- Haynes Elementary Roof Replacement – \$3,530,000 (debt exclusion)
- Nixon Elementary Roof Replacement – \$2,755,000 (debt exclusion)

FinCom recommends approval of Article 4, the Town Manager’s Capital Budget. For other recommendations, please see the attached chart of FinCom votes.

**Community Preservation Act (“CPA”) Fund Articles:** FinCom has reviewed the ten CPA Fund Articles. Please see the attached chart of FinCom votes.

**Enterprise Funds:** FinCom has reviewed the three Enterprise Fund budgets and notes that each relies on the use of retained earnings, which is not sustainable over the long term but is being addressed by Town management.

### Town Operating Budget

The Town of Sudbury’s Operating Budget for Town Departments, including Employee Benefits and OPEB contributions attributable to the Town and excluding debt payments, will increase by 3.71% over the Fiscal Year 2025 (FY25) budget.

| Item                                 | FY26 Amount         | YoY Change \$      | YoY Change (%) |
|--------------------------------------|---------------------|--------------------|----------------|
| General Government                   | \$4,049,199         | \$231,673          | 6.07%          |
| Public Safety                        | \$10,679,760        | \$280,473          | 2.70%          |
| Public Works                         | \$6,414,763         | \$44,007           | 0.69%          |
| Human Services                       | \$1,072,144         | \$40,966           | 3.97%          |
| Culture & Recreation                 | \$1,773,678         | \$56,937           | 3.32%          |
| Reserve Fund                         | \$300,000           | \$0                | 0.00%          |
| Town-Wide Operating                  | \$226,764           | \$25,459           | 12.65%         |
| Employee Benefits                    | \$7,637,358         | \$493,119          | 6.90%          |
| OPEB Trust Contribution (Town & SPS) | \$214,500           | \$0                | 0.00%          |
| <b>TOTALS</b>                        | <b>\$32,368,166</b> | <b>\$1,172,635</b> | <b>3.76%</b>   |

FinCom makes the following observations with respect to the Town Operating Budget:

- Town Departments deserve credit for their efforts to maintain services within a limited town budget. The FY26 budget supports Sudbury's public safety, infrastructure, community, and town administration within the limits of Proposition 2 ½.
- Of concern, there remains little room in the budget for anything new. The FY26 budget contains no new initiatives despite several unmet needs.
- The Town Manager has worked within these constraints by restructuring staff responsibilities to better meet the town's needs without adding headcount. However, challenges remain such as adding long unfilled public safety positions and meeting the community's operational expectations for the new Fairbank Community Center.
- The Town faces fixed costs that are rising faster than revenue, creating the possibility that we will not be able to meet future departmental needs within the current budget.
- The FY26 budget includes a 12.75% expected increase in medical insurance costs and a 5.28% increase in Sudbury's contribution to the Middlesex County Retirement System.
- FinCom notes several reasons for confidence in the FY26 operating budget including:
  - The budget assumes full employment. Spending on salaries and compensation represents over half of the Town Department Budget, and normal staffing turnover results in some savings each year. We expect this to continue.
  - The budget does not rely on Free Cash or other one-time-use of funds to cover ongoing expenses.
  - Though the Town has several unmet staffing needs, it is maintaining good fiscal discipline by not temporarily funding structural deficits.
  - If the Article 12 FY26 Stabilization Fund transfer is approved at this year's Town Meeting, the Town will be close to the stabilization fund target as set forth in the Select Board's Budget and Financial Policies, protecting the Town in case of a severe financial emergency.

*The Town Manager's Proposed FY26 Budget can be found at:*

<https://cdn.sudbury.ma.us/wp-content/uploads/sites/292/2025/01/FY26-Town-Manager-Proposed-Budget-01-30-25.pdf?version=6e4299efba7dc083673e8de890844ffc>



## Sudbury Public Schools Operating Budget

The SPS operating budget, including Employee Benefits and OPEB contributions attributable to SPS and excluding debt, will increase by \$2,486,381, or 4.51% from the FY25 budget. (The increase is 3.26% over the FY25 budget – the Town’s guidance to SPS – when Employee Benefits and OPEB are not included.)

FinCom makes the following observations with respect to the SPS operating budget:

- Consistent with recent years, there is a need for additional academic and social, emotional, and mental health support for SPS students. In keeping with this philosophy, the FY26 budget supports, and increases, the resources that were contemplated in the FY25 budget.
- SPS continues to make concerted efforts to take a right-sized approach to its budget, balancing students’ needs while utilizing all available funding options.
- FinCom noted the addition of an assistant principal at the elementary level resulting from a projected increase in PK-8 enrollment.
- FinCom is concerned that NESDEC projects SPS will see an increase in PK-8 enrollment of approximately 225 students, which will result in a future budget pressure to provide adequate resources for these additional students. While these are preliminary numbers, we will need to monitor this potential budget pressure, especially with the planned reduction of 3 classroom teachers next year to align with class size guidelines.
- SPS expects to have an estimated \$600K in unassigned special education circuit breaker reimbursements that may be applied to other allowable expenses as they arise during the year.
- FinCom notes that the ELA curriculum acquisition was identified as a need in the district’s FY24 budget, however the FY26 operating budget contains no funds for that purpose. Funds for the ELA curriculum acquisition are contained in Article 37.
- While the requested base budget is fully funded for FY26, there remain Tier 1 and Tier 2 initiatives that are not supported and represent clear and present needs.
- Some FinCom members raised concerns about SPS’ long-term energy strategy and the development of solar resources using school property.

*The SPS FY26 Budget Book may be accessed at:*

<https://www.sudbury.k12.ma.us/school-committee/presentations-plans>

## Lincoln Sudbury Regional High School Operating Budget

Sudbury's contribution to the LSRHS operating budget, including Employee Benefits and contributions to the LSRHS OPEB Fund, and excluding debt payments, will increase by \$912,173 or 3.06% (taking into account the actual FY25 assessed amount rather than budgeted FY25 assessment). The total LSRHS budget will increase by 2.99% over the FY25 budget. Sudbury's assessment decreased by 0.07% to 87.24% of the total LSRHS budget versus the prior year.

FinCom makes the following observations with respect to the LS Operating Budget:

- LS also continues to make concerted efforts to take a right-sized approach to its budget, balancing students' needs while utilizing all available funding options.
- LS is not taking on new recurring operating expenses that may be cost prohibitive in future years to address anticipated decreased enrollment in upcoming years.
- Health insurance cost increases for both active employees and retirees have seen impactful increases of 12%.
- Further enrollment declines are expected over the next several years, and the impact of those declines on student services and programs must be monitored.
- The LS budget absorbs an increase in Out-Of-District special education expenses through prudent planning and significant use of special education circuit breaker reimbursements. Some members noted the amount of circuit breaker funds applied to the budget does not appear to be sustainable and is therefore an area to watch in coming years.
- There is a 4.78% reduction in Debt Service (noting that FY26 will be the last for building bonded debt expense with the roof project debt expected to begin in FY27).

*The LS FY25 Budget may be accessed at:*

[https://drive.google.com/file/d/1n2UPzql1dc512AxxV-1\\_OLjsMBNY9qye/view](https://drive.google.com/file/d/1n2UPzql1dc512AxxV-1_OLjsMBNY9qye/view).

## Debt Service

The Town's debt service will increase by 1.47% in FY26 to a total of \$4,969,223, or 2% of General Fund revenues (below the 10% guideline in the Town's Financial Policies Manual). The key drivers of this amount are debt obligations approved in prior years for Fairbank, Fire Station #2, Stearns Mill Dam/Dutton Road Bridge, Town-wide drainage, and CSX land acquisition. Last year, the Town authorized an additional \$2,350,000 in debt for the Atkinson Pool renovation that to date remains unissued. Debt service for new projects that may be approved during the May 2025 town meeting will not have financial impact until FY27.

## Town Capital Budget

Capital spending in the Town supports everything from DPW equipment to HVAC units, public safety equipment, Town facilities, and buildings. Capital is presented in the Town Manager's Capital Operating Budget (Article 4), which includes items that cost \$100,000 or less, and in individual warrant articles for projects exceeding \$100,000. There are several sources of funding for capital.

Four are being recommended to fund capital requests at this year's Annual Town Meeting:

**Tax Levy:** the revenue a community can raise through real and personal property taxes. Typically, the tax levy is the funding source for the Town Manager's Capital Operating Budget, as well as a portion of debt service. In FY26 the tax levy is also the funding source for Article 36, SPS School Classroom Instructional Equipment Replacement.

**Free Cash:** the unencumbered fund balance in the General Fund at the end of a fiscal year. The certified Free Cash available at the FY26 Annual Town Meeting is \$7,271,136, of which \$2,920,720 is recommended to be used to fund capital articles, and \$2,450,416 is proposed to be carried over to FY27. Free Cash is the proposed funding source for the following capital items: Roads, Culverts, Drainage, Consultants & Construction; 6-wheel Dump Truck with Slide-in Sander; Dump Truck with Plow and Spreader; DPW Emergency Operations Center Cost Share; Fire Engine Pumper Replacement; SPS Fire Alarm, Emergency Lighting/BDA Systems Design; SPS HVAC Capital Improvement Engineering Study; and SPS ELA School Curriculum Implementation.

**Debt:** Debt can be an effective tool to finance capital improvements. The warrant recommends debt as the financing source for the following capital items: Ambulance Replacement; Josiah Haynes Elementary Roof Replacement; John Nixon Elementary Roof Replacement; and the Atkinson Pool Renovation Supplemental Funds. We note that the debt associated with the two roof projects will require a debt exclusion under Proposition 2 ½.

**CPC Funds:** the result of a 3% tax surcharge residents pay beyond the levy, and a portion of matching funds from the State that varies from year to year. 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. CPC may also designate up to 5% for administrative costs. The CPC is projected to collect an estimated \$3.24 million in FY26 from CPC surcharge revenues, the State match, and interest. Of this, \$118,050 is requested for administration. After paying current debt service of \$628,943 for past purchases such as Cutting and Dickson, Libby, Nobscot, Pantry Brook and Johnson Farm, this leaves about \$2.49 million for new projects out of FY26 revenue.

CPC has recommended the following capital projects be funded or partially funded with CPA funds: Fairbank Community Center and Haskell Field Landscape Master Plan; Sudbury Housing Authority Allocation (Pine Lakes neighborhood and Richard Avenue duplexes); Hosmer House Collection; Hosmer House Envelope, Heating, Ventilation and Air Conditioning; and the Hosmer House Wooden Roof.

### **Town Manager's Capital Operating Budget**

For FY26, the Town Manager's Capital Operating Budget, which appears in Article 4, totals \$1,219,400, a \$590,743 or 94% increase above FY25. In accordance with the 2020 Division of Local Services (DLS) Report, FinCom is pleased to see these capital items funded within the tax levy. Having reviewed and agreed with the need for and amount of each item in the Town Manager's Capital Budget, FinCom recommends approval of Article 4.

### **Additional Capital Warrant Articles**

The FinCom has reviewed each of the additional capital warrant articles, relying on materials submitted by the proponents, information received at hearings, and the reports of the CIAC and, where applicable, the CPC.

Please see the attached chart of FinCom votes. FinCom encourages the Town to continue to bring additional capital spending within the tax levy, in line with advice received from the state, particularly for anticipated life-cycle replacement of capital equipment.

FinCom also recommends a \$700,000 deposit into the capital stabilization fund in Article 13. This is \$50,000 above the Town Manager's initial recommendation and will ensure that during FY26 the Town will achieve the 2% of operating budget target for capital stabilization outlined in the Town's Financial Policies Manual.

## Your FY26 Property Tax Bill

Under the FY26 proposed budget, the estimated tax increase for an average residential property in Sudbury (assessed at \$1,121,972 as of FY25) would be \$515, or 3.14% year over year, consisting of

- \$526, attributed to the FY26 operating budget increase; and
- (\$11) attributed to FY26 capital budget.

These figures do not include the CPA 3% surcharge.

## Conclusion

The FinCom commends the Town, SPS, and LSRHS for their thoughtful budget efforts and their cooperation with the FinCom's work. As noted above, we remain concerned about pressures on the Operating Budget, with the rise of fixed costs in relation to revenue. We look forward to the Town Manager's assessment of these pressures and working with him and his team to address them going forward.

Respectfully submitted,

John Baranowsky

Andrew Bettinelli

Michael Ferrari (Co-Chair)

Karl Fries

Michael Joachim (Co-Chair)

Ryan Lynch

Eric Poch

Henry Sorett

Andrew Sousa

## Town Meeting Warrant Data Summary

## Articles with Finance Committee Recommendations

| Description   | Requested Amount | Finance Committee Recommendation |
|---|------------------|----------------------------------|
| FY25 Budget Adjustments   | N/A              | No Position                      |
| FY26 Budget   | \$126,040,721    | Approval                         |
| FY26 Capital Budget   | \$1,219,400      | Approval                         |
| FY26 Transfer Station Enterprise Fund Budget  | \$346,870        | Approval                         |
| FY26 Pool Enterprise Fund Budget  | \$547,034        | Approval                         |
| FY26 Recreation Field Maintenance Enterprise Fund Budget  | \$252,577        | Approval                         |
| FY25 Snow & Ice Transfer  | TBD              | to be given at TM                |
| Unpaid Bills of Prior Fiscal Years  | N/A              | No Position                      |
| Chapter 90 Highway Funding  | N/A              | Approval                         |
| FY26 Revolving Fund Spending Limits   | N/A              | Approval                         |
| FY26 Transfer into Stabilization Fund   | \$400,000        | Approval                         |
| Transfer into Capital Stabilization Fund  | \$700,000        | Approval                         |
| FY25 Pool Enterprise Fund Budget Adjustment   | TBD              | to be given at TM                |
| Create Pension Stabilization Fund   | \$175,000        | Disapproval                      |
| Create Accrued Leave Fund   | \$25,000         | Disapproval                      |
| Establishment of a Fairbank Community Center Revolving Fund   | N/A              | Approval                         |
| Establishment of a Public Health Revolving Fund   | N/A              | Approval                         |
| Establishment of Electric Vehicle Revolving Fund  | N/A              | Approval                         |
| Accept MGL C. 200A - Disposition of Unclaimed Property  | N/A              | Approval                         |
| Adopt Hero Act, Clause 221  | N/A              | Approval                         |
| Amend General Bylaws C. 5, Finance Committee  | N/A              | Approval                         |
| Amend Bylaws, C. 11 Capital Planning  | N/A              | Disapproval                      |
| Amend General Bylaws C. 68, Town Meetings   | N/A              | No Position                      |
| Amend C. 170 - Weights & Measures Fees  | N/A              | Approval                         |
| Adopt Opt-In Specialized Stretch Energy Code  | N/A              | No Position                      |
| Modification of Zoning Bylaw Section 5500 Accessory Dwelling Units in Residence Districts and Section 7110 Definitions and word usage | N/A              | No Position                      |
| Purchase of Fire Engine   | \$725,000        | Approval                         |
| Ambulance Replacement   | \$500,000        | Approval                         |

| <b>Description</b>  | <b>Requested Amount</b> | <b>Finance Committee Recommendation</b> |
|---|-------------------------|---|
| Roads, Culvert, Drainage, Consultant & Construction   | \$950,000               | Approval                                |
| Dump Truck with Plow & Spreader   | \$146,000               | Approval                                |
| 6-wheel Dump Truck with Slide-in Sander   | \$382,000               | Approval                                |
| Atkinson Pool Renovation Additional Funds   | \$429,000               | to be given at TM                       |
| DPW Emergency Operations Center Cost Share  | \$125,000               | Approval                                |
| SPS - School Classroom Instructional Equipment Replacement  | \$100,000               | Approval                                |
| SPS - ELA Curriculum Implementation   | \$250,720               | Approval                                |
| SPS - HVAC Capital Improvement Engineering Study  | \$152,000               | Approval                                |
| SPS - Fire Alarm, Emergency Lighting and Bi-Directional Amplification System Design Fees            | \$190,000               | Approval                                |
| SPS - Haynes Elementary Roof Replacement and Repair   | \$3,530,000             | Approval                                |
| SPS - Nixon Elementary Roof Replacement and Repair  | \$2,755,000             | Approval                                |
| Sudbury 250th Committee Funds   | TBD                     | to be given at TM                       |
| MBTA Buildings - Funding for Acquisition  | TBD                     | to be given at TM                       |
| Community Preservation Act Fund - Fairbank Community Center and Haskell Field Landscape Master Plan | \$500,000               | Disapproval                             |
| Community Preservation Act Fund - Hop Brook   | \$90,000                | Approval                                |
| Community Preservation Act Fund - Sudbury Housing Authority Allocation                              | \$450,000               | to be given at TM                       |
| Community Preservation Act Fund - Sudbury Housing Trust Allocation                                  | \$690,000               | Approval                                |
| Community Preservation Act Fund - Hosmer House Collection   | \$119,500               | Approval                                |
| Community Preservation Act Fund - Hosmer House Envelope & HVAC                                      | \$640,000               | Approval                                |
| Community Preservation Act Fund - Hosmer House Roof   | \$386,000               | Approval                                |
| Community Preservation Act Fund - Regional Housing Services Office (RHSO) Membership Fee            | \$43,000                | Approval                                |
| Community Preservation Act Fund - Return of Unspent Funds   | \$425,346               | Approval                                |
| Community Preservation Act Fund - General Budget and Appropriations                                 | \$746,993               | Approval                                |
| Decrease CPA surcharge  | N/A                     | to be given at TM                       |
| Means tested tax exemption  | N/A                     | to be given at TM                       |
| Walkway Funding and Taking  | N/A                     | to be given at TM                       |



## Estimated Impact on FY26 Residential Tax Bill

| ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2026 TAX BILL                   |              |              |              |                               |              |
|--|--------------|--------------|--------------|-------------------------------|--------------|
|  |              |              |              | FY25 Avg<br>Property<br>Value |              |
| Property Value   | 100,000      | 300,000      | 500,000      | 1,121,972                     | 1,200,000    |
| <b>FY25 Residential Tax Bill</b>   | 1,464        | 4,392        | 7,320        | 16,426                        | 17,568       |
| <b>FY26 Articles - Estimated Tax Impact:</b>   |              |              |              |                               |              |
| Art. 3 - FY26 Operating Budget   | 47           | 141          | 235          | 526                           | 564          |
| Art. 4 - FY26 Capital Budget   | 4            | 12           | 20           | 45                            | 48           |
| Art. 36 - SPS - Classroom Instructional Equip  | 1            | 3            | 5            | 11                            | 12           |
| FY25 Capital Articles  | (6)          | (18)         | (30)         | (67)                          | (72)         |
| <b>FY26 Estimated Residential Tax Bill</b>   | 1,510        | 4,530        | 7,550        | 16,941                        | 18,120       |
| <b>FY26 Estimated Increase (%)</b>   | <b>3.14%</b> | <b>3.14%</b> | <b>3.14%</b> | <b>3.14%</b>                  | <b>3.14%</b> |
| <b>THESE AMOUNTS ARE ESTIMATES AND MAY NOT CORRESPOND WITH THE FINAL FY26 TAX BILLS.</b> |              |              |              |                               |              |

Notes:

This chart shows the estimated tax impact of Town Meeting Articles. The columns shown above represent the FY25 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 or appropriation from available funds.

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.

## 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 can 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 (real estate taxes) by the total value of the property assessment, multiplied by 1,000. Real Estate 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:

**Sample Tax Rate Calculation**

|                                |                |
|--------------------------------|----------------|
| Real Estate Taxes to Be Raised | 99,084,945     |
| Assessed Value (Town-Wide)     | 6,768,097,392  |
| Tax Levy/Assessed Value        | <u>0.01464</u> |
| <b>Tax Rate</b>                | <b>14.64</b>   |

**Individual Tax Calculation Example**

|                        |                         |
|------------------------|-------------------------|
| Average Home Value     | 1,121,972               |
| Home Value/1,000       | 1,121.97                |
| Tax Rate (per/1000)    | 14.64                   |
| <b>Real Estate Tax</b> | <u><b>16,425.67</b></u> |

## General Fund Budget Summary of Revenues & Expenditures

| <b>REVENUES</b>                             | <b>FY24<br/>Actual</b> | <b>FY25<br/>Budgeted</b> | <b>FY26<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|---|------------------------|--------------------------|-----------------------------|--------------------------------|
| Real Estate and Personal Property Taxes     | 105,315,361            | 109,295,845              | 112,821,267                 | 3.23%                          |
| State Aid                                   | 7,349,362              | 7,695,442                | 7,890,000                   | 2.53%                          |
| Medicaid Reimbursement                      | 109,946                | 98,251                   | 98,251                      | 0.00%                          |
| Local Receipts                              | 7,656,482              | 5,580,000                | 6,176,000                   | 10.68%                         |
| Other Available                             | 819,076                | 824,494                  | 695,000                     | -15.71%                        |
| Free Cash                                   | 6,115,464              | 1,557,057                | 4,170,720                   | 167.86%                        |
| <b>TOTAL REVENUES &amp; AVAILABLE FUNDS</b> | <b>127,365,690</b>     | <b>125,051,089</b>       | <b>131,851,238</b>          | <b>5.44%</b>                   |
|   |                        |                          |                             |                                |
| <b>EXPENDITURES</b>                         | <b>FY24<br/>Actual</b> | <b>FY25<br/>Budgeted</b> | <b>FY26<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
| Education - SPS                             | 44,029,869             | 45,785,871               | 47,279,447                  | 3.26%                          |
| Education - LS                              | 28,537,698             | 29,497,481               | 30,252,405                  | 2.56%                          |
| Education - Vocational                      | 193,961                | 450,000                  | 400,000                     | -11.11%                        |
| General Government                          | 3,388,604              | 3,817,526                | 4,049,199                   | 6.07%                          |
| Public Safety                               | 10,005,847             | 10,399,287               | 10,679,760                  | 2.70%                          |
| Public Works                                | 5,965,018              | 6,370,755                | 6,414,763                   | 0.69%                          |
| Human Services                              | 863,586                | 1,031,178                | 1,072,144                   | 3.97%                          |
| Culture & Recreation                        | 1,614,791              | 1,716,740                | 1,773,678                   | 3.32%                          |
| <b>TOTAL TOWN DEPARTMENTS</b>               | <b>94,599,374</b>      | <b>99,068,839</b>        | <b>101,921,396</b>          | <b>2.88%</b>                   |
| Reserve Fund                                | 0                      | 300,000                  | 300,000                     | 0.00%                          |
| Town-Wide Operating & Transfers             | 1,907,363              | 652,812                  | 1,476,764                   | 126.22%                        |
| Town Debt Service                           | 3,093,132              | 4,897,465                | 4,969,223                   | 1.47%                          |
| State & County Charges                      | 260,525                | 310,312                  | 320,397                     | 3.25%                          |
| Employee Benefits (Town and SPS)            | 14,855,507             | 16,487,414               | 17,973,338                  | 9.01%                          |
| OPEB Trust Contribution (Town & SPS)        | 650,000                | 650,000                  | 650,000                     | 0.00%                          |
| <b>TOTAL OPERATING BUDGETS</b>              | <b>115,365,901</b>     | <b>122,366,842</b>       | <b>127,611,118</b>          | <b>4.29%</b>                   |
| Town Manager Capital Operating Article      | 728,525                | 628,697                  | 1,219,400                   | 93.96%                         |
| Capital Expenditures - Other Articles       | 3,616,652              | 2,055,550                | 3,020,720                   | 46.95%                         |
| <b>TOTAL CAPITAL EXPENDITURES</b>           | <b>4,345,177</b>       | <b>2,684,247</b>         | <b>4,240,120</b>            | <b>57.96%</b>                  |
| <b>TOTAL EXPENDITURES</b>                   | <b>119,711,078</b>     | <b>125,051,089</b>       | <b>131,851,238</b>          | <b>5.44%</b>                   |

| <b>FUND BALANCE</b>                     | <b>FY24<br/>Actual</b> | <b>FY25<br/>Budgeted</b> | <b>FY26<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|---|------------------------|--------------------------|-----------------------------|--------------------------------|
| Beginning Fund Balance                  | 7,655,411              | 9,736,828                | 8,179,771                   | -15.99%                        |
| Revenues (increase to Fund Balance)     | 127,365,690            | 123,494,032              | 127,680,518                 | 3.39%                          |
| Expenditures (decrease to Fund Balance) | (119,711,078)          | (125,051,089)            | (131,851,238)               | 5.44%                          |
| Reserve for Expenditures/Encumbrances   | (5,573,195)            |                          |                             |                                |
| <b>ENDING FUND BALANCE</b>              | <b>9,736,828</b>       | <b>8,179,771</b>         | <b>4,009,051</b>            | <b>-50.99%</b>                 |

## Town Operating Budget Detail

| DEPARTMENT                      | FY23<br>Actuals | FY24<br>Actuals | FY25<br>Budgeted | FY26<br>Requested | FTEs<br>FY23 | FTEs<br>Current |
|---------------------------------|-----------------|-----------------|------------------|-------------------|--------------|-----------------|
| <b>GENERAL GOVERNMENT</b>       |                 |                 |                  |                   |              |                 |
| Select Board/Town Manager       | 613,270         | 515,538         | 536,011          | 766,523           | 4.0          | 6.0             |
| Human Resources                 | 170,466         | 241,003         | 268,305          | 219,360           | 2.0          | 2.0             |
| Law                             | 198,890         | 358,174         | 420,523          | 432,137           | 1.0          | 0.0             |
| Finance Committee               | -               | 4,036           | 4,959            | 5,108             | 0.0          | 0.0             |
| Accounting                      | 338,082         | 307,920         | 322,916          | 338,635           | 4.0          | 4.0             |
| Assessors                       | 263,376         | 336,823         | 373,036          | 409,086           | 3.0          | 3.0             |
| ATM/Finance Director, TC        | 309,281         | 636,955         | 640,894          | 671,201           | 4.0          | 4.0             |
| Information Systems             | 566,158         | 158,810         | 260,374          | 200,990           | 3.0          | 3.0             |
| Town Clerk & Registrars         | 349,816         | 319,119         | 376,746          | 350,340           | 4.0          | 4.0             |
| Conservation                    | 154,658         | 224,857         | 238,117          | 255,466           | 3.0          | 3.0             |
| Planning & Board of Appeals     | 257,148         | 285,369         | 375,645          | 400,354           | 4.0          | 4.0             |
| <b>PUBLIC SAFETY</b>            |                 |                 |                  |                   |              |                 |
| Police                          | 4,434,938       | 4,517,158       | 4,699,841        | 4,654,773         | 41.0         | 36.0            |
| Fire                            | 4,800,138       | 5,188,213       | 5,362,017        | 5,691,972         | 43.0         | 43.0            |
| Building Department             | 266,234         | 300,476         | 337,429          | 333,015           | 4.0          | 4.0             |
| <b>PUBLIC WORKS</b>             |                 |                 |                  |                   |              |                 |
| Engineering                     | 594,812         | 503,277         | 642,452          | 555,301           | 5.0          | 5.0             |
| Streets & Roads                 | 2,463,798       | 2,636,028       | 2,864,098        | 2,924,851         | 17.0         | 17.0            |
| Snow & Ice                      | 905,679         | 696,699         | 450,000          | 500,000           | 0.0          | 0.0             |
| Trees and Cemetery              | 439,489         | 382,136         | 497,096          | 495,968           | 5.0          | 5.0             |
| Parks and Grounds               | 251,964         | 292,464         | 306,477          | 336,951           | 2.0          | 3.0             |
| Combined Facilities             | 1,316,237       | 1,454,414       | 1,610,633        | 1,601,692         | 6.0          | 5.0             |
| <b>HUMAN SERVICES</b>           |                 |                 |                  |                   |              |                 |
| Health Department               | 539,315         | 455,287         | 571,086          | 585,817           | 5.0          | 5.0             |
| Senior Center                   | 356,937         | 353,952         | 399,231          | 422,491           | 5.0          | 6.0             |
| Veterans Affairs                | 44,221          | 54,347          | 60,861           | 63,836            | 1.0          | 1.0             |
| <b>CULTURE &amp; RECREATION</b> |                 |                 |                  |                   |              |                 |
| Goodnow Library                 | 1,289,709       | 1,362,769       | 1,441,324        | 1,483,638         | 14.0         | 14.0            |
| Recreation                      | 223,836         | 243,120         | 262,720          | 277,037           | 3.0          | 3.0             |
| Historical Commission           | 7,129           | 5,356           | 8,589            | 8,679             | 0.0          | 0.0             |
| Historic Districts Commission   | 3,473           | 3,546           | 4,107            | 4,324             | 0.0          | 0.0             |

## Capital Budget

| Project Name   | Department   | Cost                               | Funding Source |
|--|--------------|------------------------------------|----------------|
| Ford F150 EV   | Conservation | \$ 50,000                          | Tax Levy       |
| Ford Explorer  | Health       | 50,000                             | Tax Levy       |
| Town-Wide Walkways Improvements & Design                 | Public Works | 50,000                             | Tax Levy       |
| Survey Total Station - for Surveying                     | Public Works | 55,000                             | Tax Levy       |
| Bandit Chipper   | Public Works | 99,000                             | Tax Levy       |
| Multi Use Off Road Tractor Parks                         | Public Works | 32,500                             | Tax Levy       |
| Fire Station Headquarters and Fire Station 2 Design      | Facilities   | 50,000                             | Tax Levy       |
| Goodnow Library Roof Design                              | Facilities   | 80,000                             | Tax Levy       |
| Flynn Building Roof Design                               | Facilities   | 25,000                             | Tax Levy       |
| Chevy Tahoe or Equivalent                                | Fire         | 75,000                             | Tax Levy       |
| Life Pak 15 Replacements                                 | Fire         | 63,100                             | Tax Levy       |
| Network Storage Upgrade at Primary Data Center           | IT           | 99,000                             | Tax Levy       |
| Microsoft 365 Migration and Implementation               | IT           | 80,800                             | Tax Levy       |
| Entrance Mat Retrofit - Curtis, Haynes, Loring and Noyes | SPS          | 80,000                             | Tax Levy       |
| Carpet Replacement                                       | SPS          | 77,000                             | Tax Levy       |
| Schools classroom VCT Flooring Replacement               | SPS          | 75,000                             | Tax Levy       |
| Bathroom Partitions and Replacements                     | SPS          | 58,000                             | Tax Levy       |
| Interior Painting of Schools                             | SPS          | 50,000                             | Tax Levy       |
| Curtis Exterior Surveillance Camera Replacement          | SPS          | 45,000                             | Tax Levy       |
| Ceiling Tile Replacement                                 | SPS          | 25,000                             | Tax Levy       |
| <b>Town Manager's Capital Operating Budget</b>           |              | <b><u>\$ 1,219,400</u></b>         |                |
| Roads, Culvert, Drainage, Consultant & Construction      | Public Works | \$ 950,000                         | Free Cash      |
| 6-Wheel Dump Truck 26,000Lb+, plus HVW Slide in Sander   | Public Works | 382,000                            | Free Cash      |
| Dump Truck with Plow & Spreader                          | Public Works | 146,000                            | Free Cash      |
| DPW Emergency Operations Center Cost Share               | Facilities   | 125,000                            | Free Cash      |
| 2005 Engine Pumper Replacement                           | Fire         | 725,000                            | Free Cash      |
| Fire Alarm, Emergency Lighting/BDA Systems Design Fees   | SPS          | 190,000                            | Free Cash      |
| HVAC Capital Improvement Engineering Study               | SPS          | 152,000                            | Free Cash      |
| School Curriculum  | SPS          | 250,720                            | Free Cash      |
| Classroom Instructional Equipment                        | SPS          | 100,000                            | Tax Levy       |
| <b>Capital Additions in Excess of \$100,000</b>          |              | <b><u>\$ 3,020,720</u></b>         |                |
| Ambulance Replacement                                    | Fire         | \$ 500,000                         | Debt           |
| Josiah Haynes Elementary Roof Replacement                | SPS          | 3,530,000                          | Debt           |
| General John Nixon Elementary Roof Replacement           | SPS          | 2,755,000                          | Debt           |
| Atkinson Pool Renovation Supplemental Funds              | Facilities   | 429,000                            | Debt           |
| <b>Capital Additions - Debt</b>                          |              | <b><u>\$ 7,214,000</u></b>         |                |
| <b>Total FY26 Capital Plan</b>                           |              | <b><u><u>\$ 11,454,120</u></u></b> |                |

## Enterprise Funds Budget

| <b>EXPENDITURES</b>                | <b>FY24<br/>Actual</b> | <b>FY25<br/>Appropriated</b> | <b>FY26<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|------------------------------------|------------------------|------------------------------|-----------------------------|--------------------------------|
| <i><b>Direct</b></i>               |                        |                              |                             |                                |
| Transfer Station                   | 282,369                | 312,318                      | 327,915                     | 4.99%                          |
| Atkinson Pool                      | 267,677                | 492,783                      | 498,434                     | 1.15%                          |
| Recreation Field Maintenan         | 171,706                | 205,163                      | 211,837                     | 3.25%                          |
| <b>Total Direct Expenditures</b>   | <b>721,752</b>         | <b>1,010,264</b>             | <b>1,038,186</b>            | <b>2.76%</b>                   |
| <i><b>Indirect</b></i>             |                        |                              |                             |                                |
| Transfer Station                   | 17,551                 | 17,551                       | 18,955                      | 8.00%                          |
| Atkinson Pool                      | 45,000                 | 45,000                       | 48,600                      | 8.00%                          |
| Recreation Field Maintenan         | 38,500                 | 38,500                       | 40,740                      | 5.82%                          |
| <b>Total Indirect Expenditures</b> | <b>101,051</b>         | <b>101,051</b>               | <b>108,295</b>              | <b>7.17%</b>                   |
| <b>Total Expenditures</b>          | <b>822,803</b>         | <b>1,111,315</b>             | <b>1,146,481</b>            | <b>3.16%</b>                   |

| <b>RECEIPTS &amp; RESERVES</b>       | <b>FY24<br/>Actual</b> | <b>FY25<br/>Appropriated</b> | <b>FY26<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|--------------------------------------|------------------------|------------------------------|-----------------------------|--------------------------------|
| Transfer Station                     | 315,827                | 329,869                      | 346,870                     | 5.15%                          |
| Atkinson Pool                        | 413,944                | 537,783                      | 547,034                     | 1.72%                          |
| Recreation Field Maintenan           | 205,842                | 243,663                      | 252,577                     | 3.66%                          |
| <b>Total Receipts &amp; Reserves</b> | <b>935,613</b>         | <b>1,111,315</b>             | <b>1,146,481</b>            | <b>3.16%</b>                   |



## Community Preservation Funds Budget

|                               | FY24<br>Actual    | FY25<br>Appropriated | FY26<br>Recommended |
|-------------------------------|-------------------|----------------------|---------------------|
| <b>Beginning CPA Balance</b>  | <b>7,007,987</b>  | <b>6,282,047</b>     | <b>7,158,478</b>    |
| <i><b>Revenues</b></i>        |                   |                      |                     |
| CPA Surcharge & Fees          | 2,553,631         | 2,300,000            | 2,670,000           |
| State Match                   | 558,308           | 575,000              | 520,000             |
| Investment Income             | 163,672           | 50,000               | 50,000              |
| <b>Total Revenues</b>         | <b>3,275,611</b>  | <b>2,925,000</b>     | <b>3,240,000</b>    |
| <i><b>Expenditures</b></i>    |                   |                      |                     |
| Debt Service                  | 990,643           | 750,193              | 628,943             |
| Administrative                | 114,500           | 114,500              | 118,050             |
| Other Projects                | 2,896,407         | 1,609,221            | 3,343,846           |
| <b>Total Expenditures</b>     | <b>4,001,550</b>  | <b>2,473,914</b>     | <b>4,090,839</b>    |
| Return Funds 2025 ATM A52     |                   | 425,345              |                     |
| Excess / (Deficiency)         | <b>(725,939)</b>  | 451,086              | <b>(850,839)</b>    |
| <b>Ending CPA Balance</b>     | <b>6,282,047</b>  | <b>7,158,478</b>     | <b>6,307,639</b>    |
| Projects in Process           | 7,399,830         | 7,032,739            | 7,032,739           |
| Reserve Historic Preservation |                   | 621,563              | 621,563             |
| <b>Total CPA Fund Balance</b> | <b>13,681,877</b> | <b>14,191,217</b>    | <b>13,340,378</b>   |

## Long-Term Debt by Project

| Fiscal Year  | Exempt Debt         |                     | Non-Exempt Debt    |                    | Total General Fund Debt | Community Preservation |                  | Total Debt          |
|--------------|---------------------|---------------------|--------------------|--------------------|-------------------------|------------------------|------------------|---------------------|
|              | Principal           | Interest            | Principal          | Interest           |                         | Principal              | Interest         |                     |
| FY2025       | \$2,473,000         | \$1,654,876         | \$469,845          | \$299,743          | \$4,897,465             | \$650,000              | \$100,193        | \$5,647,657         |
| FY2026       | 2,473,000           | 1,569,250           | 434,895            | 287,765            | 4,764,910               | 550,000                | 78,943           | 5,393,853           |
| FY2027       | 2,338,000           | 1,474,910           | 440,273            | 264,152            | 4,517,335               | 540,000                | 63,143           | 5,120,478           |
| FY2028       | 2,333,000           | 1,385,970           | 445,787            | 245,403            | 4,410,160               | 540,000                | 50,043           | 5,000,203           |
| FY2029       | 2,328,000           | 1,297,130           | 456,642            | 226,513            | 4,308,285               | 540,000                | 36,655           | 4,884,940           |
| FY2030       | 2,328,000           | 1,208,490           | 462,645            | 207,325            | 4,206,460               | 310,000                | 25,568           | 4,542,028           |
| FY2031       | 2,318,000           | 1,129,600           | 362,000            | 187,985            | 3,997,585               | 315,000                | 19,718           | 4,332,303           |
| FY2032       | 2,185,000           | 1,051,010           | 340,000            | 171,200            | 3,747,210               | 230,000                | 13,768           | 3,990,978           |
| FY2033       | 2,185,000           | 975,838             | 340,000            | 155,075            | 3,655,913               | 230,000                | 9,073            | 3,894,986           |
| FY2034       | 2,180,000           | 900,129             | 340,000            | 138,950            | 3,559,079               | 235,000                | 4,651            | 3,798,730           |
| FY2035       | 2,105,000           | 833,677             | 340,000            | 125,975            | 3,404,652               | 50,000                 | 1,563            | 3,456,215           |
| FY2036       | 1,685,000           | 769,558             | 335,000            | 113,000            | 2,902,558               |                        |                  | 2,902,558           |
| FY2037       | 1,685,000           | 717,750             | 330,000            | 100,225            | 2,832,975               |                        |                  | 2,832,975           |
| FY2038       | 1,685,000           | 665,675             | 330,000            | 87,650             | 2,768,325               |                        |                  | 2,768,325           |
| FY2039       | 1,685,000           | 613,600             | 330,000            | 75,075             | 2,703,675               |                        |                  | 2,703,675           |
| FY2040       | 1,685,000           | 561,258             | 330,000            | 62,500             | 2,638,758               |                        |                  | 2,638,758           |
| FY2041       | 1,685,000           | 508,462             | 330,000            | 49,925             | 2,573,387               |                        |                  | 2,573,387           |
| FY2042       | 965,000             | 455,400             | 330,000            | 37,350             | 1,787,750               |                        |                  | 1,787,750           |
| FY2043       | 965,000             | 416,800             | 330,000            | 24,775             | 1,736,575               |                        |                  | 1,736,575           |
| FY2044       | 965,000             | 378,200             | 305,000            | 12,200             | 1,660,400               |                        |                  | 1,660,400           |
| FY2045       | 945,000             | 339,600             |                    |                    | 1,284,600               |                        |                  | 1,284,600           |
| FY2046       | 945,000             | 301,800             |                    |                    | 1,246,800               |                        |                  | 1,246,800           |
| FY2047       | 945,000             | 264,000             |                    |                    | 1,209,000               |                        |                  | 1,209,000           |
| FY2048       | 945,000             | 226,200             |                    |                    | 1,171,200               |                        |                  | 1,171,200           |
| FY2049       | 945,000             | 188,400             |                    |                    | 1,133,400               |                        |                  | 1,133,400           |
| FY2050       | 945,000             | 150,600             |                    |                    | 1,095,600               |                        |                  | 1,095,600           |
| FY2051       | 940,000             | 112,800             |                    |                    | 1,052,800               |                        |                  | 1,052,800           |
| FY2052       | 940,000             | 75,200              |                    |                    | 1,015,200               |                        |                  | 1,015,200           |
| FY2053       | 940,000             | 37,600              |                    |                    | 977,600                 |                        |                  | 977,600             |
| <b>Total</b> | <b>\$46,741,000</b> | <b>\$20,263,783</b> | <b>\$7,382,086</b> | <b>\$2,872,787</b> | <b>\$77,259,657</b>     | <b>\$4,190,000</b>     | <b>\$403,314</b> | <b>\$81,852,971</b> |

## Long-Term Debt Maturity Dates

| <b>Project</b>                        | <b>Principal Outstanding</b> | <b>Interest Outstanding</b> | <b>Debt Type</b> | <b>Bond Matures</b> |
|---------------------------------------|------------------------------|-----------------------------|------------------|---------------------|
| Police Station Construction           | \$3,706,000                  | \$681,374                   | Exempt           | 2035                |
| Johnson Farm                          | \$935,000                    | \$172,231                   | Exempt           | 2035                |
| Broadacres - Land Acquisition         | \$2,940,000                  | \$439,780                   | Exempt           | 2041                |
| DPW Fuel Management                   | \$940,000                    | \$98,200                    | Exempt           | 2031                |
| Stearns Mill Dam                      | \$270,000                    | \$16,200                    | Exempt           | 2026                |
| Camp Sewataro                         | \$275,000                    | \$40,332                    | Exempt           | 2041                |
| Camp Sewataro                         | \$9,110,000                  | \$1,602,390                 | Exempt           | 2041                |
| Stearns Mill Dam & Bridge Replacement | \$430,000                    | \$181,982                   | Exempt           | 2044                |
| CSX Land Acquisition                  | \$745,000                    | \$196,242                   | Exempt           | 2034                |
| Fairbank Community Center             | \$27,390,000                 | \$16,835,052                | Exempt           | 2053                |
| ESCO Loan                             | \$518,086                    | \$48,514                    | Non-Exempt       | 2030                |
| Nixon School Renovation               | \$40,000                     | \$2,000                     | Non-Exempt       | 2025                |
| Police                                | \$134,000                    | \$17,320                    | Non-Exempt       | 2031                |
| Drainage/Roadway                      | \$3,155,000                  | \$1,385,247                 | Non-Exempt       | 2044                |
| Fire Station Addition                 | \$3,060,000                  | \$1,348,456                 | Non-Exempt       | 2044                |
| Clean Water Trust 2022                | \$475,000                    | \$71,250                    | Non-Exempt       | 2043                |
| Libby                                 | \$115,000                    | \$2,300                     | CPA              | 2025                |
| Johnson Farm                          | \$550,000                    | \$101,313                   | CPA              | 2035                |
| Nobscot Conservation                  | \$1,195,000                  | \$71,238                    | CPA              | 2029                |
| Pantry Brook                          | \$1,700,000                  | \$162,364                   | CPA              | 2034                |
| Nobscot Refunding                     | \$630,000                    | \$66,100                    | CPA              | 2031                |
| <b>Total Debt Projects</b>            | <b>\$58,313,086</b>          | <b>\$23,539,885</b>         |                  |                     |

## LS Regional High School Outstanding Debt

### Lincoln Sudbury Debt

| <b>Fiscal Year</b> | <b>Principal Payment</b> | <b>Interest Payment</b> | <b>Annual Debt</b> | <b>Principal Balance</b> |
|--------------------|--------------------------|-------------------------|--------------------|--------------------------|
| FY24 Balance       |                          |                         |                    | 980,000                  |
| FY2025             | 495,000                  | 21,975                  | 516,975            | 485,000                  |
| FY2026             | 485,000                  | 7,275                   | 492,275            | 0                        |

|              |                |               |                  |  |
|--------------|----------------|---------------|------------------|--|
| <b>Total</b> | <b>980,000</b> | <b>29,250</b> | <b>1,009,250</b> |  |
|--------------|----------------|---------------|------------------|--|

# Historical Context

## Revenue by Source (FY2017 – FY2026)

| <b>Fiscal Year</b> | <b>Tax Levy</b> | <b>State Aid</b> | <b>Local Receipts</b> | <b>All Other</b> | <b>Enterprise &amp; CPA Funds</b> | <b>Total</b> |
|--------------------|-----------------|------------------|-----------------------|------------------|-----------------------------------|--------------|
| 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               | 95,995,345      | 6,745,983        | 4,685,088             | 5,327,572        | 3,554,025                         | 116,308,013  |
| 2023               | 99,049,389      | 7,019,516        | 5,324,259             | 5,570,494        | 3,606,913                         | 120,570,570  |
| 2024               | 105,189,118     | 7,349,362        | 7,766,428             | 6,598,916        | 5,099,148                         | 132,002,972  |
| 2025               | 109,295,845     | 7,695,442        | 5,678,251             | 2,381,551        | 4,036,315                         | 129,087,404  |
| 2026 Est           | 112,821,267     | 7,890,000        | 6,274,251             | 4,865,720        | 4,386,481                         | 136,237,719  |

Source: Sudbury Finance Department

## Assessed Values by Property Class (FY2016 – FY2025)

| Fiscal Year | Residential   | Commercial  | Industrial | Personal Property | Total         | Residential % of Total | CIP* % of Total |
|-------------|---------------|-------------|------------|-------------------|---------------|------------------------|-----------------|
| 2016        | 3,953,667,699 | 153,832,208 | 52,641,600 | 70,742,800        | 4,230,884,307 | 93.45%                 | 6.55%           |
| 2017        | 4,128,077,415 | 161,710,160 | 28,896,800 | 90,269,320        | 4,408,953,695 | 93.63%                 | 6.37%           |
| 2018        | 4,252,412,677 | 172,317,688 | 29,891,300 | 106,053,550       | 4,560,675,215 | 93.24%                 | 6.76%           |
| 2019        | 4,396,808,625 | 189,613,218 | 30,823,000 | 111,118,740       | 4,728,363,583 | 92.99%                 | 7.01%           |
| 2020        | 4,451,809,500 | 179,424,076 | 30,823,000 | 111,016,580       | 4,773,073,156 | 93.27%                 | 6.73%           |
| 2021        | 4,476,309,078 | 193,733,270 | 32,737,300 | 109,526,080       | 4,812,305,728 | 93.02%                 | 6.98%           |
| 2022        | 4,804,601,288 | 215,023,558 | 34,203,500 | 144,636,520       | 5,198,464,866 | 92.42%                 | 7.58%           |
| 2023        | 5,708,346,257 | 269,234,148 | 38,246,300 | 155,200,260       | 6,171,026,965 | 92.50%                 | 7.50%           |
| 2024        | 6,528,068,698 | 268,293,396 | 39,102,700 | 173,473,820       | 7,008,938,614 | 93.14%                 | 6.86%           |
| 2025        | 6,790,843,084 | 276,917,020 | 41,374,300 | 183,553,167       | 7,292,687,571 | 93.12%                 | 6.88%           |

\* Commercial, Industrial, Personal Property

Source: Massachusetts Department of Revenue, Division of Local Services

## Property Tax Rates by Property Class (FY2016 – FY2025)

| Fiscal Year                   | Residential | Commercial | Industrial |
|-------------------------------|-------------|------------|------------|
| (Tax Rates/\$1,000 Valuation) |             |            |            |
| 2014                          | 18.03       | 24.94      | 24.94      |
| 2015                          | 17.60       | 24.88      | 24.88      |
| 2016                          | 17.80       | 25.11      | 25.11      |
| 2017                          | 17.74       | 25.01      | 25.01      |
| 2018                          | 17.93       | 24.30      | 24.30      |
| 2019                          | 17.91       | 24.30      | 24.30      |
| 2020                          | 18.45       | 24.97      | 24.97      |
| 2021                          | 18.83       | 25.55      | 25.55      |
| 2022                          | 18.05       | 24.57      | 24.57      |
| 2023                          | 15.77       | 20.23      | 20.23      |
| 2024                          | 14.61       | 21.16      | 21.16      |
| 2025                          | 14.64       | 21.04      | 21.04      |

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 (FY2017 – FY2026)**

| <b>Fiscal Year</b> | <b>Avg Single Family Home Value</b> | <b>Residential Tax Rate</b> | <b>YoY Change</b> | <b>Avg Single Family Tax Bill</b> | <b>YoY Change</b> |
|--------------------|-------------------------------------|-----------------------------|-------------------|-----------------------------------|-------------------|
| 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               | 801,629                             | 18.05                       | -4.14%            | 14,469                            | 3.11%             |
| 2023               | 956,957                             | 15.77                       | -12.63%           | 15,091                            | 4.30%             |
| 2024               | 1,082,016                           | 14.61                       | -7.36%            | 15,808                            | 4.75%             |
| 2025               | 1,121,972                           | 14.64                       | 0.21%             | 16,426                            | 3.91%             |
| 2026 Est           | 1,121,972                           | 15.10                       | 3.14%             | 16,941                            | 3.14%             |

Source: Sudbury Finance Department

The 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 (FY2017 – FY2026)**

| <b>Fiscal Year</b> | <b>Total Tax Levy</b> | <b>% Increase</b> | <b>New Growth</b> | <b>% Increase Net of New Growth</b> |
|--------------------|-----------------------|-------------------|-------------------|-------------------------------------|
| 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               | 95,995,345            | 3.84%             | 669,318           | 3.12%                               |
| 2023               | 99,049,389            | 3.18%             | 845,255           | 2.30%                               |
| 2024               | 105,189,118           | 6.20%             | 1,751,731         | 4.43%                               |
| 2025               | 109,504,795           | 4.10%             | 828,244           | 3.32%                               |
| 2026 (Estimate)    | 112,921,290           | 3.12%             | 550,000           | 2.62%                               |

The chart shows the value of the new property value added each year the rate of growth of the total tax levy by year.



### Community Preservation Fund Revenue (FY2017 – FY2026)

| <b>Fiscal Year</b> | <b>Local Surcharge</b> | <b>State Match Total</b> | <b>Total</b> |
|--------------------|------------------------|--------------------------|--------------|
| 2017               | 1,844,796              | 391,958                  | 2,236,709    |
| 2018               | 1,929,918              | 342,975                  | 2,304,785    |
| 2019               | 2,005,977              | 403,176                  | 2,364,507    |
| 2020               | 2,096,860              | 525,058                  | 2,610,490    |
| 2021               | 2,154,274              | 657,465                  | 2,811,739    |
| 2022               | 2,243,896              | 1,055,262                | 3,299,158    |
| 2023               | 2,381,306              | 948,629                  | 3,329,935    |
| 2024               | 2,553,631              | 558,308                  | 3,111,939    |
| 2025 (estimate)    | 2,300,000              | 575,000                  | 2,875,000    |
| 2026 (estimate)    | 2,670,000              | 520,000                  | 3,190,000    |

NOTE: Under the provisions of the Community Preservation Act (CPA), Sudbury established a Community Preservation Committee in 2002. The CPA Fund is annually supported 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 the 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**

Effective date is 7/1/2025. Three-year contract covering fiscal years 2026, 2027 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/25: 3%; 7/1/26: 3%; 7/1/27: 1.375%.

##### **Sudbury Public Schools, K-8**

###### *Teachers*

Three-year contract covering fiscal years 2023, 2024 and 2025. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/22: 2%; 7/1/23: 2%; 7/1/24: 2%.

###### *Support Staff*

Three-year contract covering fiscal years 2023, 2024 and 2025. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/22: 2%; 7/1/23: 2%; 7/1/24: 2%.

###### *Nurses*

One-year contract covering fiscal year 2022. Effective date is 7/1/2021 and Cost of Living Adjustment is 1 1/2% or \$750, whichever is greater. The next three-year contract covering fiscal years 2023, 2024, and 2025 remains unsettled as of the printing of this document.

###### *Custodians*

Three-year contract covering fiscal years 2023, 2024 and 2025. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/22: 2%; 7/1/23: 2%; 7/1/24: 2%.

#### **Town**

###### *Fire*

Three-year contract covering fiscal years 2025, 2026 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/24: 3%; 7/1/25: 2%; 7/1/26: 2%.

###### *Police – Patrol Officers*

Three-year contract covering fiscal years 2022, 2023 and 2024. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/21: 1/2%; 7/1/22: 2%; 7/1/23: 2%.

###### *Police - Sergeants*

Three-year contract covering fiscal years 2025, 2026 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/24: 3%; 7/1/25: 2%; 7/1/26: 2%.

*Police - Lieutenants*

Three-year contract covering fiscal years 2025, 2026 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/24: 3%; 7/1/25: 2%; 7/1/26: 2%.

*Public Works*

Three-year contract covering fiscal years 2025, 2026 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/24: 3%; 7/1/25: 2.5%; 7/1/26: 2%.

*Engineering*

Three-year contract covering fiscal years 2022, 2023 and 2024. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/21: 1/2%; 7/1/22: 2%; 7/1/23: 2%.

*Supervisory*

Three-year contract covering fiscal years 2025, 2026 and 2027. Effective dates and Cost of Living Adjustment percentage increases to salary schedule are: 7/1/24: 3%; 7/1/25: 2%; 7/1/26: 2%.

## Budget Terms and Definitions

**Abatement:** 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.

**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.

**Allowance for Abatements and Exemptions:** 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.

**Appropriation:** An authorization by town meeting to make obligations and payments from the treasury for a specific purpose

**Balanced Budget:** A plan of financial operation in which the estimate of proposed expenditures for a given period is less than or equal to the proposed means of financing these expenditures (from various sources of funds or revenues).

**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.

**Bond:** A written promise to pay a specified sum of money, called the face value or principal amount, at a specified date or dates in the future, called the maturity date(s), together with periodic interest at a specified rate. The difference between a note and a bond is that the latter runs for a longer period of time and requires greater legal formality.

**Bond Anticipation Note:** Short-term interest-bearing notes issued by a government in anticipation of bonds to be issued at a later date. The notes are retired from proceeds from the bond issue to which they are related. Also referred to as a BAN.

**Budget:** A plan of financial operation embodying an estimate of proposed expenditures for a given period (usually a 12-month period referred to as the Fiscal Year, or FY) and the proposed means of financing them.

**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.

**Exemption:** A reduction 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.

**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.

**Fund:** A grouping of related accounts that is used to maintain control over resources that have been segregated for specific activities or objectives

**Fund Balance:** Fund balance is the difference between assets and liabilities in a governmental fund.

**Fund Equity:** Fund equity is the difference between assets and liabilities in an enterprise fund.

**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.

**GAAP:** Generally accepted accounting principles.

**GASB:** The Government Accounting Standards Board (GASB) is the authoritative standard setting body that provides guidance on how to prepare financial statements in conformity with GAAP.

**General Fund:** The primary operating fund. It is used to account for all financial resources, except those that are required to be accounted for in another fund

**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.

**Master Plan:** “A statement through text, maps, illustrations or other forms of communication, that is designed to provide a basis for decision making regarding the long-term physical development of the municipality...” according to Massachusetts General Law Chapter 41 Section 81D.

**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.

**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.

**Policy:** A course or principle of action adopted or proposed by a government.

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

**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.

**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.

**Stabilization Fund:** Under Massachusetts General Law Chapter 40 §5B, a community may establish one or more stabilization funds for different purposes by a two-thirds vote of Town Meeting. It may amend the purposes of those funds at a later time in the same manner. Appropriations into and from the funds require a two-thirds vote of Town Meeting.

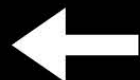
**Tax Levy:** The tax levy is the revenue a community can raise through real and personal property taxes. In Massachusetts, municipal revenues to support local spending for schools, public safety, general government and other public services are raised through the tax levy, state aid, local receipts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

*Introducing*  
**THE SUDBRIEF**



Delivered straight to your inbox.



**SIGN UP HERE**

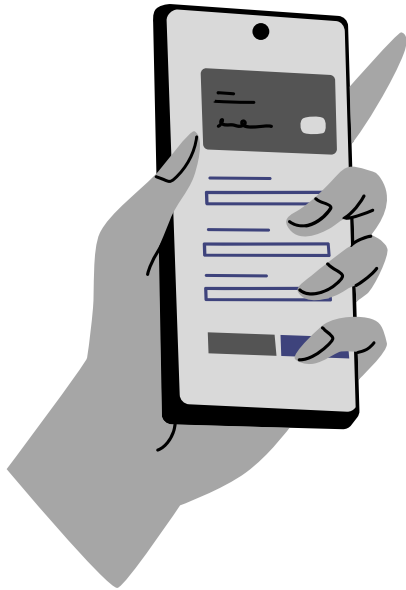
[sudbury.ma.us/sudbrief](http://sudbury.ma.us/sudbrief)







**SHARE YOUR OPINIONS  
MAKE YOUR TOWN BETTER**



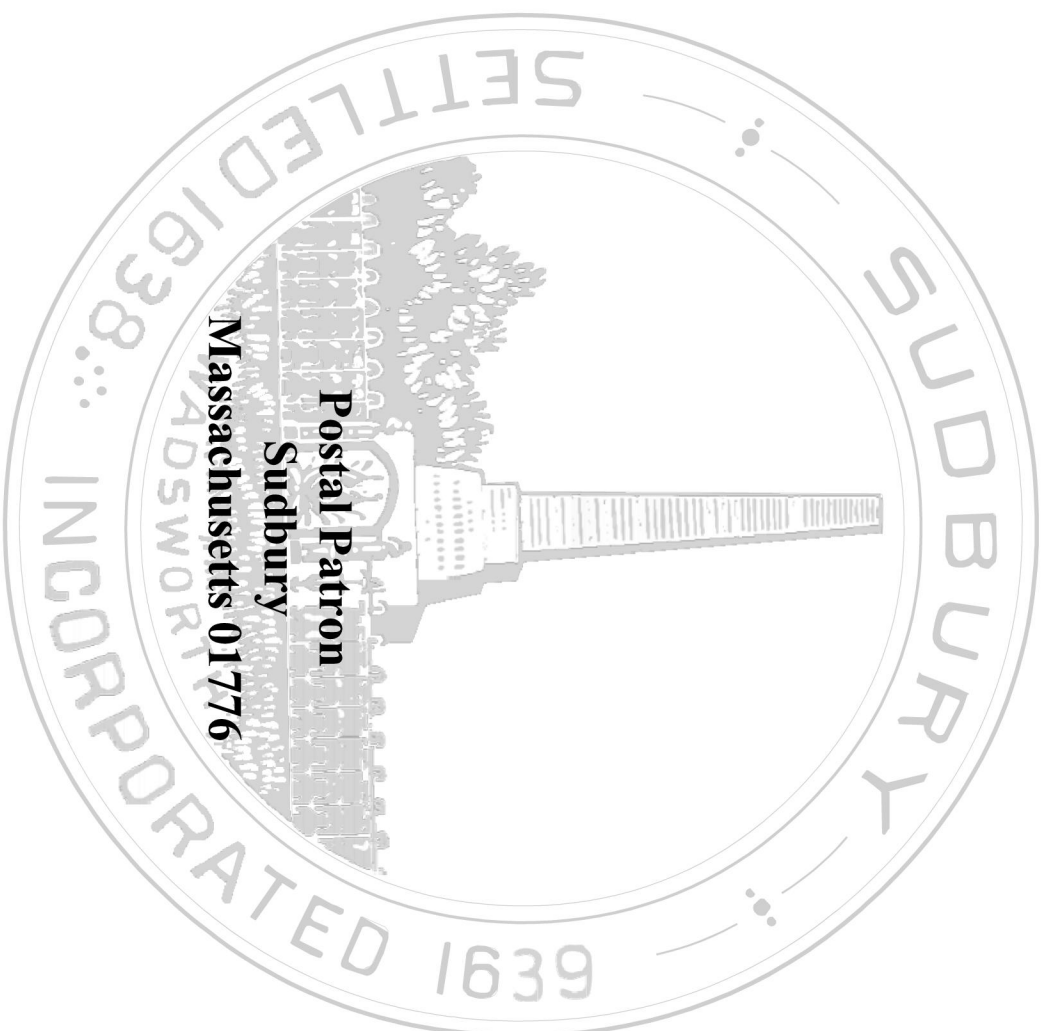
**Make your voice  
HEARD.  
Sign up today.**

Resident input is essential to the town's decision-making process. FlashVote sends one-minute surveys on important local matters to residents who sign up to share their opinions. When each survey ends, FlashVote sends the anonymized results to everyone who participated, and the town gets valuable feedback from the community.



**[SUSBURY.MA.US/FLASHVOTE](https://SUSBURY.MA.US/FLASHVOTE)**

Select Board  
Sudbury, MA 01776



Postal Patron  
Sudbury  
Massachusetts 01776

U. S. POSTAGE  
PAID  
Permit No. 4  
Sudbury, MA 01776  
ECRWSS