



SUDBURY SELECT BOARD
TUESDAY JULY 13, 2021
6:00 PM, ZOOM

Item #	Time	Action	Item
	6:00 PM		CALL TO ORDER
EXECUTIVE SESSION			
1.		<i>VOTE</i>	Open in regular session and immediately vote to enter Executive Session with the Chief of Police to discuss deployment of security personnel or devices, or strategies with respect thereto (G.L. c. 30A, S21(a) (4)).
2.		<i>VOTE</i>	Continue executive session to review, approve and possibly release executive session meeting minutes, pursuant to G.L. c. 30A, § 21(a)(7) “[t]o comply with, or act under the authority of, any general or special law or federal grant-in-aid requirements” (“Purpose 7”), citing to the Open Meeting Law, G.L. c. 30A, §§ 22(f), (g).
3.		<i>VOTE</i>	Vote to close Executive Session and resume Open Session
	7:00 PM		Opening remarks by Chair
			Reports from Town Manager
			Reports from Select Board
			Citizen's comments on items not on agenda
PUBLIC HEARING			
4.	7:30 PM	<i>VOTE</i>	Vote to open public hearing for discussion and vote whether there is a need for a Fall Town Meeting in accordance with Town Bylaw Article 1 Section 3.
5.		<i>VOTE</i>	Vote to close Public Hearing and resume Select Board meeting.
MISCELLANEOUS			
6.	7:45 PM		Discussion with Hop Brook Association on potential contribution to OARS.
7.	8:00 PM		Discussion on Financial Policies with Finance Director Dennis Keohane.

These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.

Item #	Time	Action	Item
8.	9:00 PM		BFRT update by Beth Suedmeyer, Environmental Planner
9.	9:30 PM		"Comprehensive Plan" presentation by resident Len Simon
10.	9:45 PM		Update from Sewataro subcommittee - planning for Fall and progress toward Select Board goals
11.	10:00		Discussion on Select Board outreach to Anti-Defamation League (ADL) regarding acts of antisemitism and next steps.
12.	10:15	<i>VOTE</i>	Discussion and vote whether to approve award of contracts by the Town Manager commencing 7/1/21 through 9/30/21, including, but not limited to, DPW, Senior Center, Facilities and Planning contracts, provided a listing is prepared and submitted to the Select Board for all contracts requiring Board advance approval which are executed by the Town Manager during said period.
13.	10:30	<i>VOTE</i>	Newsletter discussion and potential vote on desired way forward for the Newsletter.
14.	10:45	<i>VOTE</i>	Review open session minutes of 6/15/21 and 6/23/21 and possibly vote to approve minutes.
15.			Citizen's Comments (cont)
16.			Upcoming Agenda Items
CONSENT CALENDAR			
17.		<i>VOTE</i>	Vote to approve the following Town Manager appointments to the Conservation Commission: Luke Faust as an associate member for a term ending 5/31/24; also appoint Jeremy Cook as a full member for a term ending 5/31/23.
18.		<i>VOTE</i>	Vote to appoint Vice-chair Charlie Russo as liaison to the Bruce Freeman Rail Trail (BFRT) Advisory Task Force.

These agenda items are those reasonably anticipated by the Chair which may be discussed at the meeting. Not all items listed may in fact be discussed and other items not listed may also be brought up for discussion to the extent permitted by law.



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

EXECUTIVE SESSION

1: Executive session to discuss security with Police Chief

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Open in regular session and immediately vote to enter Executive Session with the Chief of Police to discuss deployment of security personnel or devices, or strategies with respect thereto (G.L. c. 30A, S21(a) (4)).

Recommendations/Suggested Motion/Vote: Open in regular session and immediately vote to enter Executive Session with the Chief of Police to discuss deployment of security personnel or devices, or strategies with respect thereto (G.L. c. 30A, S21(a) (4)).

Background Information:

The purpose is to discuss reasons for the fence and gate strategy with the Select Board, to speak a bit deeper as to why this equipment change is desired and the risks associated with the security evaluation process.

Financial impact expected:n/a

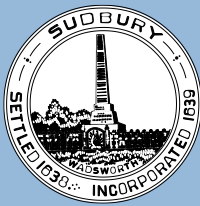
Approximate agenda time requested: 30 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

EXECUTIVE SESSION

2: Exec Session to review minutes

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Continue executive session to review, approve and possibly release executive session meeting minutes, pursuant to G.L. c. 30A, § 21(a)(7) “[t]o comply with, or act under the authority of, any general or special law or federal grant-in-aid requirements” (“Purpose 7”), citing to the Open Meeting Law, G.L. c. 30A, §§ 22(f), (g).

Recommendations/Suggested Motion/Vote: Continue executive session to review, approve and possibly release executive session meeting minutes pursuant to G.L. c. 30A, § 21(a)(7) “[t]o comply with, or act under the authority of, any general or special law or federal grant-in-aid requirements” (“Purpose 7”), citing to the Open Meeting Law, G.L. c. 30A, §§ 22(f), (g).

Background Information:

Attached draft executive minutes of 6/15/21 and 6/29/21.

Financial impact expected:

Approximate agenda time requested: 30 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

EXECUTIVE SESSION

3: Close Exec Session and resume Open Session

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to close Executive Session and resume Open Session

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

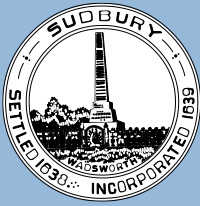
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

PUBLIC HEARING

4: Public hearing to discuss possible fall Town Meeting

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Vote to open public hearing for discussion and vote whether there is a need for a Fall Town Meeting in accordance with Town Bylaw Article 1 Section 3.

Recommendations/Suggested Motion/Vote: Vote to open public hearing for discussion and vote whether there is a need for a Fall Town Meeting in accordance with Town Bylaw Article 1 Section 3.

Background Information:

See attached email from one resident re: Fall Town Meeting; this was the only submission received.

Per ARTICLE 1, SECTION 3 of the Sudbury General Bylaws:

*A Town Meeting shall be held during the months of September, October or November at such date, time and place as the Selectmen shall determine, unless the following applies. By the end of July, the Board of Selectmen shall discuss in public session, hold a public hearing and vote to determine whether a fall Town Meeting should occur. The public hearing shall be posted in accordance with the Open Meeting Law. **The Board of Selectmen shall also solicit input from the Town via email or mail for a period of one week before the public hearing.***

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Select Board	Pending

07/13/2021 6:00 PM

Golden, Patricia

From: Pat Brown <patbrownian@me.com>
Sent: Monday, July 5, 2021 4:12 PM
To: Select Board's Office
Subject: Fall 2021 Special Town Meeting

To the Select Board:

Please do not convene a Special Town Meeting in Fall 2021 for the following reasons:

1) In the absence of pressing business, holding a fall Town Meeting constitutes an unnecessary obligation for citizens.

The Select Board has not communicated to the Town any pressing business to be conducted in the fall of 2021. The public assumes that, if such business existed, the Select Board would announce it prior to soliciting public comment on the desirability of holding a Town Meeting.

2) Holding a Town Meeting incurs a significant expense. Holding an unnecessary Town Meeting incurs that expense to no good end.

It is difficult to quantify the incremental cost of holding a Fall Town Meeting without knowing if it would be held Saturday or evening; outside or inside. However, from the October 26, 2020, minutes of the Finance Committee here: <https://sudbury.ma.us/financecommittee/fincom-mtg-minutes-october-26-2020/>

2. Report from Town Manager and Finance Director
 Town Manager Henry L. Hayes – Town Meeting cost, Health Department budget request, other relevant updates. The Town Manager shared an update on Town Meeting costs as of October 23, 2020. He stated that the typical cost for Town Meeting is approximately \$10K, but this year's Town Meeting costs totaled \$39,828.37.

The 2020 Town Meeting described above was held outdoors on a Saturday, and concluded business in one day. Without any specifics on how a Fall Town Meeting would be conducted (indoors or outdoors? daytime/weekend or evening? one day or multiple days?), it is difficult to estimate the cost this would impose—but again, there should be a compelling reason to spend between \$10,000 and \$40,000 to hold a fall town meeting. No such reason has been presented.

3) Holding a fall Town Meeting imposes significant burdens on staff, committees, and departments, and can jeopardize capital planning priorities. If there were compelling business to be conducted at a Fall Town Meeting, then the effort of creating warrant articles and presentations, obtaining feedback from the various boards and committees responsible for reviewing these proposals, filming presentations for public consumption, obtaining legal review, formatting and laying out the warrant would be a justifiable effort by Town staff. If there were a justification for holding a town meeting, all of these tasks would be time-consuming but necessary. In the absence of a justification, these tasks are a distraction from the other duties staff must discharge. The Select Board has offered no justification for calling a Fall Town Meeting. The spending proposals made at a fall town meeting should ideally be prioritized among all FY22 proposals, many of which will not be fully understood until Annual Town Meeting in the spring. The impulsive rush to spend free cash in the fall as soon as it is certified nullifies the town's thoughtful and deliberate capital project planning and prioritization .

Thank you for your willingness to accept public input.

Pat Brown
34 Whispering Pine Road
Sudbury

Attachment4.a: Email_Fall_TM (4653 : Public hearing to discuss possible fall Town Meeting)

Article 1, Section 3 of Sudbury General Bylaw states:

A Town Meeting shall be held during the months of September, October or November at such date, time and place as the Selectmen shall determine, unless the following applies. **By the end of July**, the Board of Selectmen shall discuss in public session, hold a public hearing and vote to determine whether a fall Town Meeting should occur. The **public hearing** shall be posted in accordance with the Open Meeting Law. The Board of Selectmen shall also **solicit input from the Town** via email or mail for a period of one week before the public hearing.

From: Len Simon
To: Select Board, BFRT Advisory Task Force, Town Manager, Beth Suedmeyer, Adam Duchesneau,
Re: BFRT
Date: July 12, 2021

I am writing after having read Project Manager Beth Suedmeyer's email of July 8, sent in response to my email of June 17.

I am still concerned that the information coming from the Project Manager is incomplete, confusing, or indefinite.

EASEMENTS

For instance, I wanted the Project Manager to confirm her earlier statement that a 'work around' for construction was possible if a resident refused an easement.

In response, Project Manager now says, "Yes, in most cases the design team will be able to adjust the design to work around it." So, how then could the project be advertised for construction if access is denied at some locations, and no 'work around' is feasible?

And, if the design team will need to adjust the design to 'work around' it, wouldn't that modification need to be included in the 100% and final design submissions to DOT? By delaying resolution of definitive easement access the final designs cannot be submitted. What good reason is there to put off securing the answer to that issue?

Would we not be in a better position having those answers sooner rather than later? In other words, there is a logical progression with easements being a necessary preliminary step to submitting the final design. Why is there so much secrecy of this issue? Why does there appear to be an effort not to deal with this issue directly?

It seems to me that clarification of the sequence of events, particularly as they relate to easements, is essential to making an informed decision regarding the timing of calling a town meeting. Otherwise, undesirable delays may thwart the will of the residents of Sudbury.

The Project Manager's email now says town meeting action is required on a number of issues: 1) private property easements, 2) town-owned property easements, and 3) lease approval. Why would it be appropriate to put off **any** of these matters beyond a fall town meeting, considering the remaining designs are due this year and town meeting approval is needed for the project to advance?

*The Select Board has the obligation to know if a town meeting vote in favor of **any of the above three issues** is required for the 100% design submission, or the final design submission? If so, for which issues and for which design submissions?*

Residents have a right to know that information as well, and should not be in the position of having to drag the answers out of staff and the Town Manager to get it.

Why is town meeting approval needed if an easement is allowed by a landowner? This seems to be an entirely new development. This was not the process in other towns on the BFRT and is not something the Project Manager had disclosed previously.

Most importantly, the question arises:

Could a landowner who denies an easement file a legal action that could tie the project up for months or years? Or stop the BFRT project, even temporarily?

The Select Board should raise this question with town counsel. A private property easement has not yet been denied so this is only for informational purposes. As the Project Manager noted, counsel should be providing explanations and making recommendations to the Select Board.

A list should be provided by the Project Manager to the Select Board and the BFRT Advisory Task Force detailing each property for which an easement is needed - those permitted by property owner and those refused by property owner.

The Town must have a Plan B in place for those landowners who would deny an easement, so as not to stop the construction of the BFRT.

Why are we only learning about of these project-critical questions requiring BOTH legal advice AND a town meeting action so very late in the process? The 100% design is due in 3 months.

The Project Manager had told the town that construction would begin in the summer of 2022. However, if a town meeting vote on any issue was required for submitting the remaining designs, and there was no fall or special town meeting, then the remaining designs could not be submitted until May 2022 at the very earliest. Then, DOT would want to review those designs before allowing the project to go out to bid. In that case, construction would not begin in 2022 as promised. And the programed FY 2022 funding year would close.

PERMITTING

Permitting by the Conservation Commission is required for the BFRT. It is not on their agenda for July 12, 2021, and their next meeting is July 26. Knowing this process can take several meetings, with potential legal challenges, it does not seem prudent to have waited this long to begin permitting.

CHAPTER 91

The Chapter 91 Application for Determination of Applicability was not filed with DEP until May 4, 2021, six or seven months after the Project Manager learned from Fuss & O'Neil it was an issue to secure DOT's approval for the BFRT. It has been more than 60 days since the Application was filed and it is still an open question. It should have been filed earlier.

The practice of allowing tasks to wait until the very last moment, and varying statements about what is required, have placed the entire BFRT project in jeopardy. Deadlines have routinely been moved back and missed. As you may recall, Sudbury was on the MPO's "At high risk for not making advertising deadline" (delinquency list) in 2020 and the BFRT 2D was again highlighted in purple earlier this year as not being ready.

The Bruce Freeman Rail Trail project has lacked transparency and candor with inconsistent explanations for delays.

In 2020 Town Meeting overwhelmingly voted to expedite the completion of the BFRT design, and so instructed staff and the Town Manager. That vote is still operative.

The Town Manger has said he is committed to completing the BFRT on time. Now his actions must match his words.



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

5: Close public hearing

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to close Public Hearing and resume Select Board meeting.

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

6: OARS discussion with Hop brook assoc.

REQUESTOR SECTION

Date of request:

Requestor: Jeff Winston, Hop Brook Association

Formal Title: Discussion with Hop Brook Association on potential contribution to OARS.

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Select Board	Pending

07/13/2021 6:00 PM



HOP BROOK PROTECTION ASSOCIATION

Restoring and Preserving Sudbury's Ponds

Box 707, Sudbury, MA 01776

Sudbury SelectBoard
Sudbury, MA 01776

2/19/2021
(updated 7/7/2021)

Dear SelectBoard:

Greetings. I'm writing on behalf of the Hop Brook Protection Association, a group of residents/abutters and other supporters dedicated to the cleanup and maintenance of the Hop Brook ponds and watershed. You may remember our 2020 presentation of plans to clear the ponds of invasive water chestnuts. That program is currently in its second year and going very well, and we are now focusing on identifying and controlling the excess nutrients that cause the plant overgrowth and bad odors every summer, as well as working directly with the EPA on the upcoming renewal of the Marlborough Easterly Wastewater Treatment Plant discharge permit.

What you may not know is that for all our efforts, we have received extensive expert help and support from a Concord-based non-profit organization known as OARS. OARS's mission is to protect, improve and preserve the watershed of the Assabet, Sudbury, and Concord Rivers. Unlike HBPA, they have access to experts and equipment which is invaluable to our efforts. HBPA alone has received the equivalent of tens of thousands of dollars of consulting expertise from OARS, and their help has also been invaluable to our Conservation Commission.

We recently discovered that Sudbury is one of very few towns that benefits from OARS's services without providing them with any financial support. Neighboring towns (including Acton, Concord, Hudson, Maynard, Stow, and Wayland) make annual contributions to OARS of \$1000 – \$2000. We know that Sudbury believes in paying their fair share, and so we propose that Sudbury make annual contributions to OARS beginning with \$2000 this year.

Just in the last year, OARS has provided many services at no charge to Sudbury, including:

- Provided us with the results of water testing they performed in Sudbury, presented in the context of their test results in neighboring towns. This has been invaluable in pinpointing trouble spots along the brook.
- Co-authored two successful grants that enable us to perform more detailed sampling and analysis of water quality in Hop Brook.
- Provided expertise, specialized equipment, and training needed to sample water quality along the Hop Brook.

- Provided expertise in interpreting results, developed detailed reports, and consulted on options for further sampling.
- Facilitated water chestnut removal within the Sudbury River watershed (including Sudbury).
- Connected us with other towns who faced similar water quality and invasive plant issues who we then consulted for their experiences and expertise.
- Protected Sudbury's interests in advocating for less discharge of pollutants from the Marlboro sewage treatment plant.
- Provided guidance and equipment to install and calibrate a streamflow gauge on Hop Brook

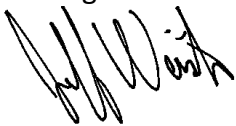
Lori Capone says *“OARS is an invaluable partner in water quality monitoring, is the leader of the water chestnut management subcommittee for the region, and is a great resource for assistance with applying for grants to improve water resources within the SuAsCo Watershed. Prior to my involvement with OARS, their efforts benefitted Sudbury through their involvement with improving effluent from the Marlboro Wastewater Treatment Plant. OARS also has involvement with tracking larger developments within the watershed in an effort to prevent additional negative impacts to the watershed and partners with the SuAsCo River Stewardship Council with annual events highlighting these valuable resources”*. (We discussed a ConComm contribution with Lori, but her FY2022 funds are already fully allocated.)

We encourage you to reach out to ConComm for their input as well.

Please consider making an immediate \$2000 contribution to OARS out of free cash, and adding an annual \$2000 contribution to OARS beginning in your FY2023 budget for payment in summer 2022.

Please don't hesitate to contact myself or Lori if you have any questions.

Best Regards



Jeff Winston, President
Hop Brook Protection Association
Cc: Lori Capone, ConComm
Cc: OARS, HBPA

PS – you can learn more about OARS at <http://oars3rivers.org/>

From: Jeff Winston <jeff@hopbrook.org>
Sent: Tuesday, May 25, 2021 8:08 PM
To: Golden, Patricia <GoldenP@sudbury.ma.us>
Cc: Russo, Charlie <RussoC@sudbury.ma.us>; Dretler, Janie <DretlerJ@sudbury.ma.us>; Hayes, Henry <HayesH@sudbury.ma.us>; Capone, Lori <CaponeL@sudbury.ma.us>; glenn.pransky@gmail.com; Jeff Winston <jeffw@kwcpa.com>
Subject: Re: Letter to Select Board on behalf of OARS

Hi Pat - as per Charlie's comments below - can you please schedule HBPA to meet with the Selectmen next month to discuss the Town's contribution to OARS?

Thanks!
 /j

On 3/25/2021 8:20 PM, Russo, Charlie wrote:

Hi Jeff:

Thank you for checking in on this. Yes, and no on the updates.

After I spoke with you and Glenn from the Hop Brook Protection Association, I spoke with Lori Capone from Conservation and Alison and Julia from OARS. I checked in with Henry on this, and tried to get a sense of how a request to fund OARS with \$2,000 of town money might be received, coming in at the point in the budget process when the request was made.

In the end, the feedback I received everywhere I checked was that trying to get this funding request into the upcoming budget would be a mistake, as this budget has already been vetted, finalized, and voted by multiple groups. Trying to squeeze in a new funding request, while technically it might be possible to find \$2k from free cash, could be seen as seeking favorable treatment for a group outside the ordinary budget process and would set a bad precedent. I ran this scenario past Alison and Julia at OARS, and they agreed that adhering to the full budget process/scrutiny was the best way to build a long-term partnership between OARS and Sudbury, rather than attempt to shoehorn it in this year and possibly have the funding be called into question later on.

As a result, I asked Janie to get a discussion regarding OARS onto the Select Board agenda once our agendas become a little less packed, hopefully sometime around June or July. I will seek feedback from the Board on how it wants to approach this subject, but I would support inviting you and Glenn, and OARS to the discussion to best advocate for this idea.

I am happy to share with you individually more detail on my own thoughts on the matter.

Hope this helps. Happy to set up a time to talk further with any questions/concerns/thoughts you might have.

thanks,

Charlie

978-808-3972

Charlie Russo

Town of Sudbury Select Board member

russoc@sudbury.ma.us

The Secretary of State's office has determined that most emails to and from municipal offices and officials are public records. Consequently, confidentiality should not be expected.

From: Jeff Winston <jeff@hopbrook.org>
Sent: Thursday, March 25, 2021 5:06:36 PM
To: Dretler, Janie
Cc: Hayes, Henry; Capone, Lori; Russo, Charlie; Glenn Pransky
Subject: Re: Letter to Select Board on behalf of OARS

Hi Charlie - any update on this? Thanks!
 /j

On 3/4/2021 12:56 PM, Dretler, Janie wrote:

Thank you, Jeff, for your email. Charlie Russo is the Board liaison to ConCom. I will ask Charlie to review this matter with our Town Manager and Conservation Coordinator.

Best regards,

Janie Dretler
 Chair, Sudbury Select Board

The Secretary of State's office has determined that most e-mails to and from municipal offices and officials are public records. Consequently, confidentiality should not be expected.

From: Jeff Winston <jeff@hopbrook.org>
Sent: Friday, February 19, 2021 12:23 PM
To: Select Board
Cc: Hayes, Henry; Capone, Lori; Dretler, Janie; Russo, Charlie
Subject: Letter to Select Board on behalf of OARS

Attachment6.b: Hop Brook request OARS (4625 : OARS discussion with Hop brook assoc.)

Greetings - Please see the attached letter from HBPA and supported by
Lori Capone. Please contact Lori or myself if you have any questions.

Thanks!

/j



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

7: Financial policies discussion

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Discussion on Financial Policies with Finance Director Dennis Keohane.

Recommendations/Suggested Motion/Vote: Discussion on Financial Policies with Finance Director Dennis Keohane.

Background Information:

Financial impact expected:

Approximate agenda time requested: 60 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

SELECT BOARD POLICIES & PROCEDURES REVIEW SUBCOMMITTEE OVERVIEW

SUBCOMMITTEE GOALS (2/2/21)

Subcommittee has accomplished to date (5/4/21 or 5/11/21):

- Work on bringing to full Select Board revised set of **Financial Policies**:
 - Subcommittee do mechanics of documents and zero in on key **'policy'** decisions.
 - Solicit input of Finance Director.
 - Bring back to full Select Board for full review and discussion.
- Review Capital Planning/ Funding program:
 - Review recommendations of Strategic Financial Planning Committee for Capital Funding (SFPCC).
 - Analyze DLS Recommendations.
 - Subcommittee to recommend to Select Board if/where DLS recommendations and SFPCC be incorporated into Select Board or other Town policies.
 - Subcommittee recommend to Select Board if/where DLS and SFPCC recommendations be **actioned** upon e.g. Town Meeting articles (to modify town fund accounts etc.)
 - Action Plan, Roadmap to achieve goals...
 - Charlie "Bridge Letter..."
- Maintain transparent communication to the public and solicit public feedback at our public meetings:
 - In how we conduct the subcommittee.
 - As a theme in how we write policies for ease of understanding town finances.
 - Transparent capital plan / needs / forecast.

PROGRESS TO DATE:

The subcommittee has produced a revised 19-page financial policies manual, a spreadsheet of 42 key policy considerations for the Select Board, and a draft Q&A Finance Director document.

Subcommittee meetings on:

2/2: Kick-off, define goals and deliverables, approach, and timeline. Start review of draft financial policy document identifying key questions/comments.

2/17: Continue review of draft policy document identifying key questions/comments.

3/11: Continue review of draft financial policy document/and started review of DLS recommendations to incorporate into draft policy document.

3/18: Review DLS report to incorporate recommendations into draft policy document.

3/25: Finalize policy questions/comments for Dennis Keohane (Town Finance Director) meeting.

4/01: Finalize policy questions/comments for Dennis Keohane (Town Finance Director) meeting.

4/08: Meeting with Dennis Keohane to discuss questions/comments.

4/12: Meeting with Dennis Keohane to discuss questions/comments.

4/15: Final edits to financial policy draft.

4/22: Final edits to financial policy draft.

4/23: Financial draft review with Dennis Keohane.

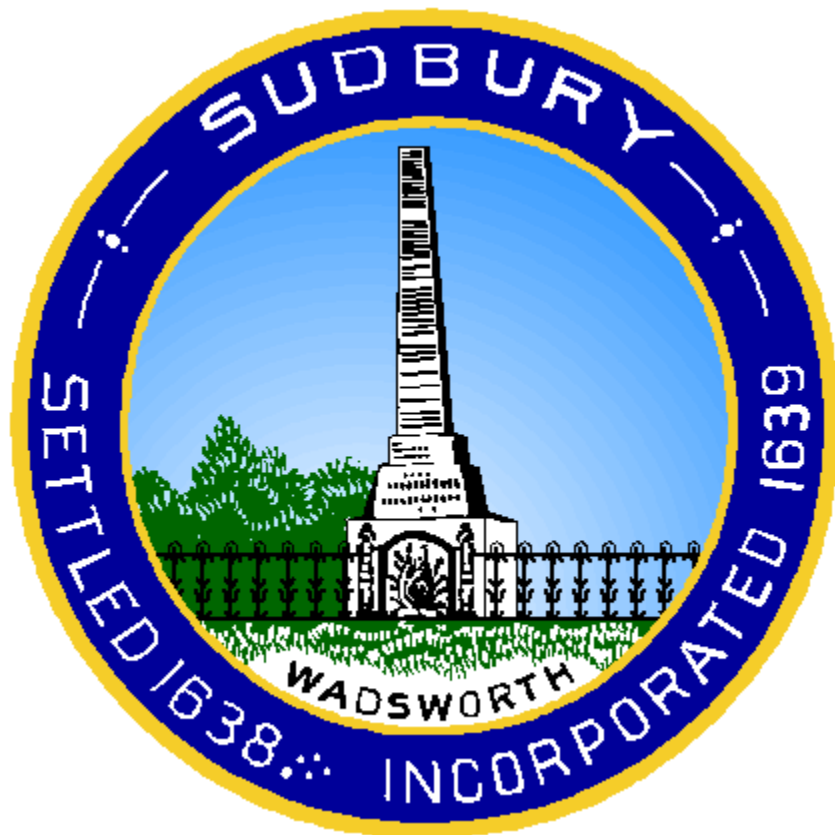
4/28: Financial draft review with Dennis Keohane.

4/29: Financial policy documents final editing.

5/4, 5/11, or 5/18: Share Financial Policy document draft and policy decisions with Select Board.

DOCUMENT ORIGIN: JAN 5, 2021 DRAFT BY DENNIS KEOHANE (Finance Dir.) INCORPORATING 2020 DLS RECOMMENDATIONS. EDITED BY SELECT BOARD POLICIES AND PROCEDURES SUBCOMMITTEE AS OF APRIL 29, 2021

Town of Sudbury, Massachusetts
Financial Policies Manual
DRAFT July 2, 2021



Attachment 7.b: Select Board Financial Policies WORKING DRAFT 2021 07.09.21 (4695 : Financial policies discussion)

Introduction

The Town of Sudbury is committed to safeguarding public funds, protecting local assets, and complying with financial standards and regulations. To that end, this manual of financial policies provides guidance for local planning and decision making. The policies as a whole are intended to outline objectives, provide formal direction, and define authority to help ensure sound fiscal stewardship and management practices. Each is a living document that should be reviewed periodically and updated as necessary.

With these policies, the Town of Sudbury, through its [Select Board](#), Town Manager, and employees, commits to the following objectives:

- Sustaining a consistent level of service and value for residents
- Safeguarding financial integrity and minimizing risk through a system of internal controls
- Ensuring the quality and maintenance of capital assets ([see Appendix A for definition of capital assets](#))
- Conforming to general law, uniform professional standards, and municipal best practices
- Protecting and enhancing the town's credit rating
- Promoting transparency and public disclosure
- [Revisiting and reviewing the policies every three years to assess thresholds and targets.](#)

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Town of Sudbury, Massachusetts

Financial Policies Manual

Table of Contents

Financial Reserves..... 4

Forecasting..... 7

Overlay 10

Debt Management..... 12

Investments 15

Capital Assets 16

Other Postemployment Benefits Liability (OPEB)..... 19

DRAFT

Attachment 7.b: Select Board Financial Policies WORKING DRAFT 2021 07.09.21 (4695 : Financial policies discussion)

FINANCIAL RESERVES

PURPOSE

To help the Town stabilize finances and maintain operations during difficult economic periods, this policy establishes prudent practices for appropriating to and expending reserve funds. With well-planned sustainability, Sudbury can use its reserves to finance emergencies and other unforeseen needs, to hold money for specific future purposes, or in limited instances, to serve as revenue sources for the annual budget. Reserve balances and policies can also positively impact the Town's credit rating and consequently its long-term cost to fund major projects.

APPLICABILITY

This policy pertains to short- and long-range budget decision making and applies to the Select Board, Sudbury Public School Committee, and Town Manager in those duties. It also applies to the related job duties of the Finance Director, the Town Accountant, the Board of Assessors, and the Finance Committee.

POLICY

The Town of Sudbury commits to building and maintaining its reserves so as to have budgetary flexibility for unexpected events and significant disruptions in revenue-expenditure patterns and to provide a source of available funds for future capital expenditures. **The Town will strive to maintain overall reserves in the level of 10-12% of the prior year General Fund budget.** These reserves are comprised of the general stabilization fund, special purpose stabilization funds and free cash target. Adherence to this policy will help the Town withstand periods of decreased revenues and control spending during periods of increased revenues. Other types of reserves include retained earnings and overlay surplus.

A. Protection of Credit Rating

Maintenance of the highest-level credit rating possible is important to the continued financial health of Sudbury as it reduces the costs of issuing debt. Credit rating firms consider management practices to be very important factors. Poor management practices can inadvertently jeopardize the financial health of a local government. To be proactive in assuring the Town of Sudbury does not engage in these practices, the Select Board of the Town of Sudbury has adopted the following credit rating protection policies. The Town will not rely on reserves to sustain operating budgets. Use of such reserves will be limited to helping the Town deal with short-term or emerging financial stress. In the subsequent year, the Town will either reduce spending to within the limits of recurring revenues or seek approval for additional revenues from the voters of the Town. The Town will not defer current costs, such as pension or benefit costs, to a future date.

A.B. Free Cash

The Division of Local Services (DLS) defines free cash as “the remaining, unrestricted funds from operations of the previous fiscal year, including unexpended free cash from the previous year.” DLS must certify free cash before the Town can appropriate it in the new year.

By August 15th each year, the Town Accountant shall submit to DLS a year-end balance sheet, free cash checklist, and year-end reporting checklist. Once DLS certifies free cash, the Town Accountant will provide copies of the certified balance to the Select Board, Town Manager, and Finance Director.

Each spring, the Town Manager shall include the Town's free cash balance in the proposed budget submitted to the Select Board and Finance Committee for the ensuing fiscal year, along with details on the proposed uses of and/or retention level of free cash. Any proposed use of free cash for capital equipment or improvements shall be consistent with needs identified in the Town's capital improvement program.

The Town shall set a year-to-year goal of maintaining its free cash in the range of **3-5% of the prior year's General Fund budget**. To achieve this, the Finance Director shall assist the Town Manager in proposing budgets with conservative revenue projections, and department heads shall carefully manage their appropriations to produce excess income and budget turn backs. Further, budget decision makers will avoid fully depleting the Town's free cash in any year, so that the succeeding year's calculation can begin with a positive balance. Moreover, as much as practicable, the Town will limit its use of free cash to funding one-time expenditures (like capital projects or emergencies and other unanticipated expenditures) and will should appropriate any free cash excess above **5%** of the General Fund budget to reserves, to offset unfunded liabilities, or to set aside for existing debt.

B-C. Stabilization Funds

A stabilization fund is a reserve account allowed by state law to set aside monies to be available for future spending purposes, including emergencies or capital expenditures, although it may be appropriated for any lawful purpose. Prior to the adoption of this policy, the Town established and appropriated to a general stabilization fund and special purpose stabilization funds for capital projects.

General Stabilization: The Town will endeavor to maintain a minimum balance of **5% of the prior year's General Fund budget** in its general stabilization fund. Withdrawals from general stabilization should only be used to mitigate emergencies or other unanticipated events that cannot be supported by current General Fund appropriations. When possible, withdrawals of funds should be limited to the amount available above the **5%** minimum reserve target level. If any necessary withdrawal drives the balance below the minimum level, the withdrawal should be limited to **one-third of the general stabilization fund balance at a time, endeavoring to never fully deplete it**. Replenishment of the funds should be made annually at the Fall Town Meeting, or the earliest available meeting after free cash has been certified.

Special Purpose Stabilization Funds

Capital Stabilization: The Town will appropriate annually to the capital stabilization fund so that over time it achieves a target balance sufficient to cover the Town's cash outlay for capital. Doing so enables the Town to pay outright for moderate-range (under \$1M) capital expenditures and thereby preserve debt capacity for major, higher-dollar

purchases or projects. This approach balances debt with pay-as-you-go practices and protects against unforeseen costs. The Town should endeavor to achieve and maintain a combined target balance for all capital-related special purpose stabilization funds equal to 2% of prior year General Fund budget.

Withdrawals from the Capital Stabilization Fund should be avoided until the target balance has been achieved. Once achieved, funds should be replenished annually at the Fall Town Meeting, or the earliest available meeting after free cash has been certified (subject to free cash availability).

Turf Stabilization: The Town maintains a special purpose fund to offset the cost of periodic replacement of designated town-owned turf fields. As originally created, this fund applies to the Cutting Field but could be expanded to other fields in the future.

G.D. Overlay Surplus

The overlay is a reserve the Town uses to offset unrealized revenues resulting from property tax abatements and exemptions. Sudbury officials will prudently manage the overlay in accordance with the Town's Overlay policy to avoid the need to raise overlay deficits in the tax levy. At the conclusion of each fiscal year, the Board of Assessors shall submit to the Town Manager and Finance Director an update of the overlay reserve with data that includes, but is not limited to, the gross balance, potential abatement liabilities, and any transfers to surplus. If the balance exceeds the amount of potential liabilities, the Town Manager may request that the Board of Assessors vote to declare those balances surplus, available for one-time expenditures (as with free cash).

FORECASTING

PURPOSE

To assess the range of choices available to budget decision makers when determining how to allocate resources, this policy establishes guidelines for evaluating revenue sources and the requirement to determine an expenditure strategy as part of the annual budget process and longer-range fiscal planning. Forecasting helps local officials understand the long-range implications of pending near-term decisions.

APPLICABILITY

This policy applies to the Town Manager as the Town's chief budget decision maker. It also applies to the job responsibilities of the Finance Director, Sudbury Public Schools Superintendent, Sudbury Public Schools Business Manager, Select Board, Sudbury Public Schools Committee, and Finance Committee.

POLICY

A. Revenue Guidelines

The Town will continually seek to diversify its revenue to improve the equity and stability of sources. Each year and whenever appropriate, the Town will reexamine existing revenues and explore potential new sources. A balance will be sought between elastic and inelastic revenues to minimize any adverse effects caused by inflation or other economic changes. Additionally, intergovernmental revenues (e.g., local aid, grants) will be reviewed annually to determine their short- and long-term stability in order to minimize detrimental impacts.

The Town will generally avoid using one-time revenues to fund ongoing or recurring operating expenditures. These one-time revenue sources can include, but are not limited to, free cash, bond premiums, overlay surplus, sale of municipal equipment, legal settlements, insurance proceeds, and gifts. Additionally, the Town hereby establishes the following priority order when appropriating one-time revenues:

- General Stabilization Fund (maintenance of 5% of prior year's General Fund budget)
- Annual Capital Spending (non-debt), target of 3% of prior year's General Fund budget)
- Capital Stabilization Fund (target of 2% of prior year's General Fund budget)
- OPEB Trust Fund
- Existing debt

New growth (residential or commercial) permanently adds to the tax base. The Town should endeavor to contribute any new growth in excess of 1% of prior year's General Fund budget to capital expenditures or reserves.

Economic downturns or unanticipated fiscal stresses may compel reasonable exceptions to the use of one-time revenue. In such cases, the Town Manager, in consultation with the Finance Director, can recommend its use for operational appropriations. Such use will trigger the Town Manager to develop a plan to avoid continued reliance on one-time revenues.

State laws impose further restrictions on how certain types of one-time revenues may be used. The Town will consult the following General Laws when the revenue source is:

- Sale of real estate: [M.G.L. c. 44, §63](#) and [M.G.L. c. 44, §63A](#)
- Gifts and grants: [M.G.L. c. 44, §53A](#) and [M.G.L. c. 53A½](#)
- Bond proceeds: [M.G.L. c. 44, §20](#)
- Sale of moveable property: [M.G.L. c. 44, § 53](#)

This policy further entails the following expectations regarding revenues:

- The Assessing Department will maintain property assessments for the purpose of taxation at full and fair market value as prescribed by state law.
- Town departments that charge fees (Enterprise Funds and recreation programs, for example) shall annually review their fee schedules and propose adjustments when needed to ensure coverage of service [costs and endeavor to generate retained earnings of 3-5% of prior year's enterprise fund budgets for asset replacement.](#)
- The Building Department will notify the Finance Director of any moderate-to-large developments that could impact building permit volume.
- Department heads will strive to be informed of all available grants and other aid and will carefully consider any related restrictive covenants or matching requirements (both dollar and level-of-effort) to determine the cost-benefit of pursuing them.
- Revenue estimates will be adjusted throughout the budget cycle as more information becomes available.

B. Expenditure Guidelines

Annually, the Town will determine a particular budget approach for forecasting expenditures, either maintenance (level service), level funded, or one that adjusts expenditures by specified increase or decrease percentages (either across the board or by department). A maintenance budget projects the costs needed to maintain the current staffing level and mix of services into the future. A level funded budget appropriates the same amount of money to each municipal department as in the prior year and is tantamount to a budget cut because inflation in mandated costs and other fixed expenses still must be covered.

C. Financial Forecast Guidelines

To determine the Town's operating capacity for each forthcoming fiscal year, the Finance Director will annually create and provide the Town Manager with a detailed budget forecast. The Finance Director shall also annually prepare a three-year financial projection of revenues and expenditures for all operating funds.

These forecasts shall be used as planning tools in developing the following year's operating budget as well as the five-year capital improvement plan.

To ensure the Town's revenues are balanced and capable of supporting desired levels of services, forecasts for property taxes, local receipts, and state aid shall be conservative based on historical trend analyses and shall use generally accepted forecasting techniques and appropriate data. To avoid potential revenue deficits, estimates for local receipts (e.g., inspection fees, investment income, license fees) should generally not exceed 90% of the prior year's actual collections without firm evidence that higher revenues are achievable.

Additionally, the forecast model should assume that:

- The Town will maintain its current level of services.
- Property taxes (absent overrides) will grow within the limits of Proposition 2½.
- New growth will be projected conservatively, considering the Town's three-year average by property class.
- The Town will annually meet or exceed the state's net school spending requirements.
- Local receipts and state aid will reflect economic cycles.
- The Town will pay the service on existing debt and adhere to its Debt Management policy.
- The Town will make its annual pension contributions and continue appropriating to its other postemployment benefits trust fund.
- The Town will build and maintain reserves in compliance with its Financial Reserves policy.

OVERLAY

PURPOSE

To set guidelines for determining the annual overlay amount in the Town's budget and for deciding whether any overlay balance can be certified as surplus.

The allowance for abatements and exemptions, commonly referred to as the overlay, is an account whose purpose is to offset anticipated abatements and exemptions of committed real and personal property taxes. Effective December 7, 2016, the Municipal Modernization Act ([Chapter 218 of the Acts of 2016](#)) provides for a single overlay account. Previously, a community had to maintain separate overlay reserves for each fiscal year and could not use the surplus from one year to cover another year's deficit without a multistep process involving the assessors, accounting officer, and local legislative body. However, the Act allows all existing overlay balances to be transferred to a single account. Although this policy treats overlay as a single account, to continue historical information and facilitate reconciliations, the Town may elect to maintain subsidiary ledgers by levy year for overlay balances.

APPLICABILITY

This policy applies to the job duties of the Board of Assessors, Director of Assessing, Town Manager, and Finance Director.

POLICY

A. Annual Overlay

Each year, the Board of Assessors shall vote in an open meeting to authorize a contribution to the overlay account as part of the budget process and to raise it without appropriation on the Town's Tax Recap Sheet. The Principal Assessor will propose this annual overlay amount to the Board of Assessors based on the following:

- Current balance in the overlay account
- Five-year average of granted abatements and exemptions
- Potential abatement liability in cases pending before, or on appeal from, the Appellate Tax Board (ATB)
- Timing of the next certification review by the Division of Local Services (scheduled every five years under the Municipal Modernization Act) The Board of Assessors shall notify the Finance Director of the amount of overlay voted

B. Excess Overlay

Annually, the Finance Director and Director of Assessing will conduct an analysis to see if there is any excess in the overlay account by factoring the following:

- Current balance in the overlay account after reconciling with the Town Accountant's records

- Balance of the property tax receivables, which represents the total real and personal property taxes still outstanding for all levy years
- Estimated amount of potential abatements, including any cases subject to ATB hearings or other litigation

Upon determining any excess in the overlay account, the Principal Assessor shall present the analysis to the Board of Assessors for its review.

C. Overlay Surplus

If there is an excess balance in the overlay account, the Board of Assessors shall formally vote in an open meeting to certify the amount to transfer to overlay surplus and shall notify the Town Manager and Finance Director in writing of its vote. If the Town Manager makes a written request for a determination of overlay surplus, the Board of Assessors shall vote on the matter within the next 10 days and notify the Town Manager and Finance Director of the result in writing. In advance of At the annual Tax Classification Hearing, the Select Board shall request an update from the Board of Assessors on the balance of the overlay account.

After being certified, Town Meeting may appropriate overlay surplus for any lawful purpose until the end of the fiscal year. However, the appropriation should be as prescribed in the Town's Forecasting policy (re: treatment of one-time revenues) and its Financial Reserves policy (re: overlay surplus). Overlay surplus not appropriated by year-end closes to the General Fund's undesignated fund balance.

DEBT MANAGEMENT

PURPOSE

To provide for the appropriate issuance and responsible use of debt, this policy defines the parameters and provisions governing debt management. Policy adherence will help the Town to responsibly address capital needs, provide flexibility in current and future operating budgets, control borrowing, and maintain capital investment capacity. This policy is also intended to maintain and enhance the town's bond rating so as to achieve long-term interest savings.

APPLICABILITY

This policy applies to the Town Manager, Select Board, Sudbury Public School Committee, and Finance Committee in their budget decision making and in the Finance Director's debt reporting. It also applies to the Finance Director's budget analysis duties. Additionally, in the role as Treasurer/Collector, the statutory responsibilities associated with debt management.

POLICY

Under the requirements of federal and state laws, the Town may periodically issue debt obligations to finance the construction, reconstruction, or acquisition of infrastructure and other assets or to refinance existing debt. The Town will issue and manage debt obligations in such a manner as to obtain the best long-term financial advantage and will limit the amount of debt to minimize the impact on taxpayers. Debt obligations, which include general obligation bonds, revenue bonds, bond anticipation notes, lease/purchase agreements, and any other debt obligations permitted to be issued under Massachusetts law, shall only be issued to construct, reconstruct, or purchase capital assets that cannot be acquired with current revenues.

A. Debt Financing

Debt may be financed either within the levy, or beyond the levy (a debt exclusion which requires a Proposition 2 ½ voter referendum).

In financing with debt, the Town **will:**

1. Issue long-term debt only for objects or purposes authorized by state law and only when the financing sources have been clearly identified.
2. Use available funds as appropriate to the greatest extent possible to reduce the amount of borrowing on all debt-financed projects.
3. Confine long-term (QUESTION) borrowing to capital improvements and projects that cost at least \$100,000 and that have useful lifespans of at least ten years or whose lifespans will be prolonged by at least ten years.
4. Restrict debt exclusion borrowing to proposals which meet all three of these criteria:
 - (1) useful life of 20 years or more
 - (2) estimated cost of the principal payment in the first year of the debt issuance be greater than 1% of the prior year's General Fund revenue. This criterion applies after target level for in-levy debt of 3% is initially achieved, as per Section B. Debt Limits and Targets Item 3.

(3) the expenditure is either for town-owned land, buildings, or infrastructure or for a LSRHS capital assessment.

5. Refrain from using debt to fund any recurring purpose, such as current operating and maintenance expenditures.
6. The policy of the Select Board shall be to include sufficient debt capacity within the levy, such that capital items can be more predictably funded.
- ~~3.7.~~ As debt within the levy decreases annually, this amount shall be used for capital, future debt, or set aside for future capital.

B. Debt Limits and Targets

The Town will adhere to these debt parameters:

1. Total annual debt service, including debt exclusions and any self-supporting debt, shall be limited to 10% of General Fund revenues, with a reasonable range-a target of 5-7%.
2. As dictated by state statute MGL ch 44 section 10, the Town's debt limit shall be 5% of its most recent equalized valuation.
- ~~2.3.~~ The Town shall endeavor to gradually and consistently pursue future debt issuances financed by within-levy dollars with a target of 3% of prior year's General Fund budget.

C. Structure and Term of Debt

The following shall be the Town's guidelines on debt terms and structure:

1. The term of any debt shall not exceed the expected useful life of the capital asset being financed and in no case shall it exceed the maximum allowed by law.
2. The Town will limit bond maturities to no more than 10 years, except for major buildings, water and water facility projects, land acquisitions, and other purposes in accordance with the useful life borrowing limit guidelines published by the Division of Local Services (DLS).
- ~~2.3.~~ For non-excluded debt the Town will generally choose terms less than 20 years and structure as level principal payments, so that over time the annual debt payment goes down, opening up capacity for future capital.
- ~~3.4.~~ Any vote to authorize borrowing will include authorization to reduce the amount of the borrowing by the amount of the net premium and accrued interest.
- ~~4.5.~~ The Town will work closely with its financial advisor to follow federal regulations and set time frames for spending borrowed funds to avoid committing arbitrage, paying rebates, fines and penalties to the federal government, and jeopardizing any debt issuance's tax-exempt status.

D. Bond Refunding

To achieve potential debt service savings on long-term debt through bond refunding, the Town will:

1. Issue debt with optional call dates no later than 10 years from issue.

2. Analyze potential refunding opportunities on outstanding debt as interest rates change.
3. Use any net premium and accrued interest to reduce the amount of the refunding.
4. Work with the Town's financial advisor to determine the optimal time and structure for bond refunding.

E. Protection of Bond Rating

To protect its bond rating, the Town will:

1. Maintain good communications with bond rating agencies, bond counsel, banks, financial advisors, and others involved in debt issuance and management.
2. Follow a policy of full disclosure on every financial report and bond prospectus, including data on total outstanding debt per capita, as a percentage of per capita personal income, and as a percentage of total assessed property value.
3. The Town will not rely on reserves to sustain operating deficits. Use of such reserves will be limited to helping the Town deal with short-term or emerging financial stress, but then the Town will either reduce spending to within the limits of recurring revenues, or seek approval for additional revenues from the voters of the Town.
4. The Town will not defer current costs to a future date. This includes costs such as pension costs or benefits costs. From time to time, the State offers municipalities the option of deferring payments to their pension system, or other costs, as a short-term way of balancing a fiscal year's budget. However, it is the intention of the Town of Sudbury not to rely on these options.
5. The Town will follow the policies as outlined in this policy statement.

F. Reporting

1. The Town's Annual Town Report, Town Manager's Budget Request and Annual Town Meeting Warrant will give comprehensive summaries of the debt obligations of the Town.
2. The Finance Director will include an indebtedness summary as part of a report on receipts and expenditures in Sudbury's Annual Town Report.
3. The Finance Director, with the Town's financial advisor, will file the annual audit and official disclosure statement within 270 days of the end of the fiscal year.

INVESTMENTS

PURPOSE

To ensure the Town's public funds achieve the highest possible, reasonably available rates of return while following prudent standards associated with safety, liquidity, and yield, this policy establishes investment guidelines and responsibilities. It is further designed to comply with the Governmental Accounting Standards Board's recommendation that each community disclose its key policies affecting cash deposits and other long-term investments to ensure they are managed prudently and not subject to extraordinary risk.

APPLICABILITY

This policy pertains to short-term operating funds, including general funds, special revenue funds, bond proceeds, capital project funds, and to all accounts designated as long-term (e.g., trusts, stabilization funds, other postemployment benefits trust fund (OPEB), and others the Town may set aside for long-term use, including scholarship and perpetual care funds). It does not pertain to the Town's retirement fund, which is managed by the Middlesex County Retirement Board. This policy applies to the Finance Director, in the role as Treasurer, his or her designee(s), and any advisors or other professionals in their responsibilities for investing and managing Town funds.

POLICY

The Finance Director shall invest funds in a manner that meets the Town's daily operating cash flow requirements and conforms to state statutes governing public funds while also adhering to generally accepted diversification, collateralization, and the prudent investment principles regarding safety, liquidity, and yield. The Finance Director will report investment performance to the Select Board each August. Additionally, they will report any deviation from the investment policy to the Select Board. (Other language from JD?)~~check language from JD and ask Dennis if this is reasonable.~~

See additional details in the Town of Sudbury Investment Policy (TODO: ADD DOC TO WEBSITE AND LINK) document as well as the Town of Sudbury CPA Investment Policy document.

CAPITAL ASSETS

PURPOSE

To ensure Sudbury's capital assets can cost-effectively sustain the town's desired service levels into the future.

APPLICABILITY

This policy applies to the Town Manager as the Town's chief budget decision maker. It also applies to the job responsibilities of the Finance Director, School Superintendent, School Business Manager, [Select Board](#), [Sudbury Public School Committee](#), and Finance Committee.

[Capital Assets are defined as the community-owned collection of significant, long-lasting, and expensive real and personal property used in the operation of government, including land and land improvements; infrastructure, such as roads, bridges, water and sewer lines; easements; buildings and building improvements; vehicles, machinery and equipment. In order to be included in Sudbury's Capital Improvement Program, Capital Assets must cost \\$20,000 or more and have a useful life of 5 or more years. Items or improvements that do not meet this threshold should be included within the Town's operating budget.](#)

POLICY

A. Capital Improvement Plan

[The Town Manager shall maintain an inventory of all Town 'capital assets' \(defined in Appendix A\), their age, value, and condition. The Town Manager will update and adopt annually a five-year capital improvement plan \("CIP"\), including the upcoming annual capital improvement budget \("CIB"\) and a four-year projection of capital needs and expenditures, which details the estimated cost, description and anticipated funding sources for capital projects. The CIP should govern projects undertaken either to build, buy, expand or replace a long-life asset or to an asset's condition beyond its original state of quality, efficiency, or useful life expectation.](#)

[Annually, the minimum level of capital spending the town should target year to year should be equivalent to 6% of the prior year's General Fund budget, drawn equally from within-levy debt and cash capital sources.](#)

[The 6% target shall guide how much capital spending can be planned in each year of the CIP.](#)

1. [The Town Manager shall establish criteria to determine capital asset prioritization, including but not limited to:](#)
 - [mitigation of safety hazards](#)
 - [legal compliance](#)
 - [ADA compliance \(Americans with Disabilities Act\)](#)
 - [operating cost reduction](#)
 - [service or efficiency improvement](#)
 - [availability of outside funding sources](#)

- conformance to asset replacement schedule
 - contributing to execution of Master Plan
 - enhancement of quality of life
2. The Town Manager shall consult with Department Heads annually regarding the composition and prioritization of the capital plan and create an ordered list sorted by urgency score, with appropriate justification (identifying criteria and which department it supports).
- 2-3. A Capital Project Submission Sheet shall be required for every item listed on the five-year CIP.
4. The CIP shall not include items that cost less than \$20,000 or have a useful life of less than 5 years. Items that do not meet this threshold should be included within the Town's operating budget.
5. Alongside the CIP prioritization, potential Funding Sources shall be identified. Wherever possible, funding sources should be derived from 'cash capital' and within levy debt funding options. Funding sources for capital may include:
- Community Preservation Act (CPA) funds (if eligible; Open Space, Recreation, Historic)
 - Town Manager's Capital Budget (items <\$100K)
 - New growth dedicated to capital
 - Capital Stabilization Fund
 - Special-purpose stabilization funds
 - Free Cash
 - In-levy Debt
 - Dedicated revenue sources (i.e. Sewataro revenue share).
 - Capital Exclusion
 - Debt Exclusion
 - Grants
6. The Town will emphasize preventive maintenance as a cost-effective approach to infrastructure maintenance. Exhausted capital goods will be replaced as necessary.
7. The CIP shall not include items deemed to be departmental maintenance. Rather, such smaller, shorter life maintenance items should be included in departmental budgets.
- 3-8. Annually, the Town shall request LSRHS's 5 and 15 year capital plans. The Town's obligation per the LSRHS agreement shall be factored into the Town CIP.

B. Risk Management

1. The Town will maintain an effective risk management program that provides adequate coverage, minimizes losses, and reduces costs.
2. The Town will annually work with the Town's insurance carrier to update all listings of Town owned assets and the value and condition of such covered assets.

C. Reporting

1. Annually by December 31st, the 5 year capital improvement plan shall be posted and accessible for public view on town website for public review at all times, reflecting

updates for any changes made. The Capital Project Submission Sheet for each project on the 5 year CIP shall be posted and linked from the CIP.

- 4.2. The Town Manager will submit a capital program **annually** to the Capital Improvement Advisory Committee (CIAC). The proposed program will detail each capital project, the estimated cost, description and funding.
- 2.3. The Town Manager shall submit Town Meeting articles for the CIB by January 31st.
4. The **Select Board** shall report all requests for capital appropriations to the Finance Committee on or before February 5. (Bylaws Article IV Section 5).
- 3.5. The Town Manager shall coordinate the timely distribution of the CIB, CIP, and associated Capital Project Submission Sheets to the Select Board, CIAC, and Finance Committee and other stakeholders. They will also solicit and coordinate receipt of questions in advance of a joint meeting of the above-mentioned boards, committees, and commissions. This joint meeting shall occur on or before March 1.
- 4.6. The Town Manager will present the CIB for approval at the Annual Town Meeting (generally the 1st Monday in May).

DRAFT

OTHER POSTEMPLOYMENT BENEFITS LIABILITY (OPEB)

PURPOSE

To provide the basis for a responsible plan for meeting the Town's obligation to provide other postemployment benefits (OPEBs) to eligible current and future retirees. This policy provides guidelines designed to ensure OPEB sustainability and achieve generational equity among those called upon to financially support OPEBs, thereby avoiding transferring costs into the future.

APPLICABILITY

This policy encompasses OPEB-related budget decisions, accounting, financial reporting, and investment.

BACKGROUND

In addition to salaries, the Town of Sudbury compensates employees in a variety of other forms. Many earn benefits over their years of service that they will not receive until after retirement. A pension is one such earned benefit. Another is a set of retirement insurance plans for health, dental, and life. These are collectively referred to as other postemployment benefits or OPEBs.

OPEBs represent a significant liability for the Town that must be properly measured, reported, and planned for financially. As part of a long-range plan to fund this obligation, the Town established an OPEB Trust Fund, which allows for long-term asset investment at higher rates of return than those realized by general operating funds.

POLICY

The Town of Sudbury is committed to funding the long-term cost of the benefits promised its employees. To do so, the Town will accumulate resources for future benefit payments in a disciplined, methodical manner during the active service life of employees. The Town will also periodically assess strategies to mitigate its OPEB liability. This involves evaluating the structure of offered benefits and their cost drivers while at the same time avoiding benefit reductions that would place undue burdens on employees or risk making the Town an uncompetitive employer.

A. Accounting and Reporting

The Finance Director will obtain actuarial analyses of the Town's OPEB liability every two years and will annually report the Town's OPEB obligations in financial statements that comply with the current guidelines of the Governmental Accounting Standards Board.

The Town Auditor shall ensure that the Town's independent audit firm reviews compliance with the provisions of this policy as part of its annual audits.

B. Mitigation

On an ongoing basis, the Town will assess healthcare cost containment measures and evaluate strategies to mitigate its OPEB liability. The Finance Director shall monitor proposed laws

affecting OPEBs and Medicare and analyze their impacts. The Human Resources Director shall regularly audit the group insurance and retiree rolls and drop any participants found to be ineligible based on work hours, active Medicare status, or other factors.

C. Funding

To address the OPEB liability, decision makers shall analyze a variety of funding strategies and subsequently implement them as appropriate with the intention of fully funding the obligation. The Town shall derive funding to invest in the OPEB trust from taxation, free cash, and any other legal form.

Appendices

Appendix A: Definition of Capital

Sudbury Capital Asset "Definition"

~~Capital Assets are the community owned collection of significant, long-lasting, and expensive real and personal property used in the operation of government, including land and land improvements; infrastructure, such as roads, bridges, water and sewer lines; easements; buildings and building improvements; vehicles, machinery and equipment. In order to be included in Sudbury's Capital Improvement Program, Capital Assets must cost \$20,000 or more and have a useful life of 5 or more years. Items or improvements that do not meet this threshold should be included within the Town's operating budget.~~ CAPITAL DEFINITION MOVED TO CAPITAL SECTION

CREDIT POLICY Appendix B: Protection of Credit Rating Policy

~~Maintenance of the highest-level credit rating possible is important to the continued financial health of Sudbury as it reduces the costs of issuing debt. Credit rating firms consider management practices to be very important factors. Poor management practices can inadvertently jeopardize the financial health of a local government. To be proactive in assuring the Town of Sudbury does not engage in these practices, the Select Board of the Town of Sudbury has adopted the following credit rating protection policies. The Town will not rely on reserves to sustain operating budgets. Use of such reserves will be limited to helping the Town deal with short-term or emerging financial stress. In the subsequent year, the Town will either reduce spending to within the limits of recurring revenues or seek approval for additional revenues from the voters of the Town. The Town will not defer current costs, such as pension or benefit costs, to a future date.~~ MOVED TO RESERVES SECTION

Town of Sudbury
 Select Board Financial Policies
 Thresholds and Targets - Capital Expenditures
 July 13, 2021

	2017	2018	2019	2020	2021	2022
<i>General Fund Budget (Budget)</i>	91,043,226	95,474,975	98,516,637	101,703,034	105,613,075	107,093,804
<i>Capital Expenditures:</i>						
Taxation (within Levy Limit)	404,000	413,190	428,322	800,000	-	202,180
Capital Exclusion	365,000	-	-	-	-	-
Free Cash	-	2,120,235	1,425,148	1,470,000	2,225,023	3,077,500
Debt (net of MSBA reimbursement)	2,021,658	1,847,283	1,494,858	1,504,658	1,870,679	2,433,239
Total	2,790,658	4,380,708	3,348,328	3,774,658	4,095,702	5,712,919
<i>Capital Expenditures % of Budget</i>						
Taxation (within Levy Limit)	0.44%	0.43%	0.43%	0.79%	0.00%	0.19%
Capital Exclusion	0.40%	0.00%	0.00%	0.00%	0.00%	0.00%
Free Cash	0.00%	2.22%	1.45%	1.45%	2.11%	2.87%
Debt (net of MSBA reimbursement)	2.22%	1.93%	1.52%	1.48%	1.77%	2.27%
Total % of Operating Budget	3.07%	4.59%	3.40%	3.71%	3.88%	5.33%
Total Target (6%)	5,462,594	5,728,499	5,910,998	6,102,182	6,336,785	6,425,628
Total Excess/(Short)	(2,671,936)	(1,347,791)	(2,562,670)	(2,327,524)	(2,241,083)	(712,709)
Non-Debt Target (3%)	2,731,297	2,864,249	2,955,499	3,051,091	3,168,392	3,212,814
Non-Debt Excess/(Short)	(1,962,297)	(330,824)	(1,102,029)	(781,091)	(943,369)	66,866
Debt Target (3%)	2,731,297	2,864,249	2,955,499	3,051,091	3,168,392	3,212,814
Non-Debt Excess/(Short)	(709,639)	(1,016,966)	(1,460,641)	(1,546,433)	(1,297,713)	(779,575)

Town of Sudbury
 Select Board Financial Policies
 Thresholds and Targets - Financial Reserves
 July 13, 2021

	2017	2018	2019	2020	2021
<i>General Fund Budget (Budget)</i>	91,043,226	95,474,975	98,516,637	101,703,034	105,613,075
<i>Financial Reserves</i>					
General Stabilization	4,384,807	4,574,740	4,885,336	5,000,904	5,325,176
Capital Stabilization	100	100	250,100	250,100	500,100
Free Cash	3,074,985	2,793,163	2,012,070	3,833,030	4,249,754
Total	7,459,892	7,368,003	7,147,506	9,084,034	10,075,030
<i>Financial Reserves % of Prior Year Budget</i>					
General Stabilization	4.94%	5.02%	5.12%	5.08%	5.24%
Capital Stabilization	0.00%	0.00%	0.26%	0.25%	0.49%
Free Cash	3.47%	3.07%	2.11%	3.89%	4.18%
Total % of Operating Budget	8.41%	8.09%	7.49%	9.22%	9.91%
<i>Financial Reserves Targets</i>					
General Stabilization					
5% Target	4,435,600	4,552,161	4,773,749	4,925,832	5,085,152
Excess/(Short)	(50,793)	22,579	111,587	75,072	240,024
Capital Stabilization					
2% Target	1,774,240	1,820,865	1,909,500	1,970,333	2,034,061
Excess/(Short)	(1,774,140)	(1,820,765)	(1,659,400)	(1,720,233)	(1,533,961)
Free Cash					
Lower Threshold Target (3%)	2,661,360	2,731,297	2,864,249	2,955,499	3,051,091
Excess/(Short)	413,625	61,866	(852,179)	877,531	1,198,663
Lower Threshold Target (5%)	4,435,600	4,552,161	4,773,749	4,925,832	5,085,152
Excess/(Short)	(1,360,615)	(1,758,998)	(2,761,679)	(1,092,802)	(835,398)

Attachment 7.c: Financial Policy Decisions Targets Thresholds For Consideration DJK 7-12-2021 (4695)

Total Financial Reserves

Lower Threshold Target (10%)	8,871,200	9,104,323	9,547,498	9,851,664	10,170,303
Excess/(Short)	<u>(1,411,307)</u>	<u>(1,736,319)</u>	<u>(2,399,992)</u>	<u>(767,630)</u>	<u>(95,274)</u>
Upper Threshold Target (12%)	10,645,439	10,925,187	11,456,997	11,821,996	12,204,364
Excess/(Short)	<u>(3,185,547)</u>	<u>(3,557,184)</u>	<u>(4,309,491)</u>	<u>(2,737,963)</u>	<u>(2,129,334)</u>

Town of Sudbury
 Select Board Financial Policies
 Thresholds and Targets - Debt Within Levy
 July 13, 2021

	2017	2018	2019	2020	2021	2022
<i>General Fund Budget (Budget)</i>	91,043,226	95,474,975	98,516,637	101,703,034	105,613,075	107,093,804
<i>Debt</i>						
Total Debt	3,627,425	3,453,050	3,100,625	3,110,425	3,476,446	2,433,239
Less: MSBA Reimbursement	(1,605,767)	(1,605,767)	(1,605,767)	(1,605,767)	(1,605,767)	-
Total Debt (net of MSBA Reimbursement)	2,021,658	1,847,283	1,494,858	1,504,658	1,870,679	2,433,239
Less: Excluded Debt	(1,787,169)	(1,670,954)	(1,325,469)	(1,320,997)	(1,705,018)	(2,182,313)
Debt within Levy Limit	234,489	176,329	169,389	183,661	165,661	250,926
<i>Debt % of Operating Budget</i>						
Total Debt	3.98%	3.62%	3.15%	3.06%	3.29%	2.27%
Less: Debt Exclusions	-1.96%	-1.75%	-1.35%	-1.30%	-1.61%	-2.04%
Less: MSBA Reimbursement	-1.76%	-1.68%	-1.63%	-1.58%	-1.52%	0.00%
Net Debt % of Operating Budget	0.26%	0.18%	0.17%	0.18%	0.16%	0.23%
<i>Debt Target (within Levy Limit)</i>						
Target (3%)	2,731,297	2,864,249	2,955,499	3,051,091	3,168,392	3,212,814
Excess/(Short)	2,496,808	2,687,920	2,786,110	2,867,430	3,002,731	2,961,888

Attachment 7.c: Financial Policy Decisions Targets Thresholds For Consideration DJK 7-12-2021 (4695)

Town of Sudbury
 Select Board Financial Policies
 Thresholds and Targets - Financial Reserves
 July 13, 2021

	2017	2018	2019	2020	2021
Enterprise Funds Budgets					
Transfer Station	292,732	314,092	327,506	312,646	309,103
Pool	574,279	574,434	503,447	468,279	464,136
Recreation Field Maintenance	236,758	240,337	239,866	251,198	230,786
<i>Total Enterprise Funds Budget</i>	1,103,769	1,128,863	1,070,819	1,032,123	1,004,025
Financial Reserves					
Transfer Station (Free Cash)	170,654	195,822	214,756	189,892	189,424
Pool (Free Cash)	93,317	70,413	38,834	(3,315)	(77,394)
Recreation Field Maintenance (Free Cash)	34,475	37,347	50,367	15,831	(19,691)
Total	298,446	303,582	303,957	202,408	92,339
Financial Reserves % of Prior Year Budget					
Transfer Station	33.14%	66.89%	68.37%	57.98%	60.59%
Pool	16.14%	12.26%	6.76%	-0.66%	-16.53%
Recreation Field Maintenance	14.39%	15.77%	20.96%	6.60%	-7.84%
Total % of Operating Budget	22.40%	27.50%	26.93%	18.90%	8.95%
Financial Reserves Targets					
Transfer Station					
Lower Threshold Target (3%)	15,449	8,782	9,423	9,825	9,379
Excess/(Short)	155,205	187,040	205,333	180,067	180,045
Lower Threshold Target (5%)					
Lower Threshold Target (5%)	25,748	14,637	15,705	16,375	15,632
Excess/(Short)	144,906	181,185	199,051	173,517	173,792
Pool					
Lower Threshold Target (3%)	17,341	17,228	17,233	15,103	14,048
Excess/(Short)	75,976	53,185	21,601	(18,418)	(91,442)

Lower Threshold Target (5%)	28,902	28,714	28,722	25,172	23,414
Excess/(Short)	64,415	41,699	10,112	(28,487)	(100,808)
Recreation Field Maintenance					
Lower Threshold Target (3%)	7,188	7,103	7,210	7,196	7,536
Excess/(Short)	27,287	30,244	43,157	8,635	(27,227)
Lower Threshold Target (5%)	11,979	11,838	12,017	11,993	12,560
Excess/(Short)	22,496	25,509	38,350	3,838	(32,251)

Policy Decision	Description	Comments
Name a second document for Action Plan 1 (versus Policy doc) HOWTO: initially achieve Capital Stabilization 2 Fund target balance	"How to achieve targets Plan": For example: consider over time increasing the in-levy debt capacity. E.g. when there is capital that we might have historically considered paying with debt or capital exclusions, attempt to fit within the levy. FIRE STATION EXAMPLE... Map out in How to document, plan to get to 2% target. (Approach may include "wheel of free cash")	
3 overall reserves target	10-12 percent of prior year General Fund budget (Stabilization funds (5%) + Free Cash (3%) + Capital Stabilization Fund (2%))	
4 free cash target	year-to-year goal of maintaining free cash in the range of 3-5 percent of prior year General Fund budget	
5 acceptable uses of free cash what to do with free cash in excess of max	Town will limit its use of free cash to funding one-time expenditures (like capital projects or emergencies and other unanticipated expenditures) appropriate any excess above 5 % of the General Fund to reserves or to offset unfunded liabilities or to set aside for existing debt	
6 target 7 general Stabilization Fund target	5% of prior year general fund budget	
8 general Stabilization Fund withdrawal policy	If any necessary withdrawal drives the balance below the minimum level, the withdrawal should be limited to one-third of the general stabilization fund balance	
general Stabilization Fund replenishment 9 policy capital-related Special Purpose Stabilization	Replenishment of the funds should be made annually at the Fall Town Meeting, or the earliest available meeting after Free Cash has been certified.	
10 Fund(s) target	2% of prior year General Fund budget (per DLS) Capital Stabilization Fund (target of 2% of prior year general fund budget). Also we are recommending not using fund until target balance is achieved. If funds are used they should be replenished at the next Town Meeting as free cash allows.	
11 Capital Stabilization Fund target Close Melone Stabilization Fund and transfer		
12 to Capital Stabilization Fund	DLS recommendation "Close Melone Stabilization Fund"	
Limit the number of stabilization funds to small few that have clear but broadly defined 13 purposes	does Turf fund fit this recommendation (clear but broadly defined?) and to what degree do we want to limit stabilization funds? Do we want to keep this? DLS recommendation to eliminate special purpose stabilization funds. Currently we put \$20K a year in (\$10K from field maintenance enterprise fund and \$10K from the general fund.)	
14 Turf Stabilization Fund		

- adopt Sale of Moveable property policy (to fix 15 Vehicle Surplus bylaw problem)
 - 16 use of Overlay Surplus funds policy
 - Annual Capital Spending (non-debt) target 17 policy
 - 18 OPEB Trust Fund annual contribution policy
 - 19 special one-time revenue to offset Debt policy
 - special New growth revenue towards capital 20 expenditures policy
 - Policy on "Town departments that charge fees 21 (Enterprise Funds and recreation programs...)"
 - 22 Overlay Surplus transparency
 - Minimizing debt by maximizing use of 23 available funds
 - 24 Long-term borrowing circumstances
- Sale of moveable property: M.G.L. c. 44, § 53 *** DLS option... if we want to divert to Capital Stabilization, we could accept 4th para of ... M.G.L. c. 40 § 5B and specify a percentage of each sale (of moveable property e.g. Vehicles that will be dedicated, without further appropriation, to the capital stabilization fund.
- treat like other one-time revenues for non-recurring expenses target of 3% of prior year's General Fund budget [see DLS pg 22 terminology and targets]
- How to determine how much each year, considering 'catch up contributions' - we chose to not specify within Policies (consider for How To document)
- In policies, "set aside for existing debt" e.g. Sewataro. Can't 'pre-pay' in this year's debt payment, but can make conscious decision to set aside revenue and not to raise corresponding amount of funds from levy next year for next years payment
- New growth (residential or commercial) permanently adds to the tax base. The Town should attempt to dedicate 50 to 75% of all (commercial?) new growth levy amounts to capital expenditures or reserves. In talking to Dennis determined this was too aggressive. Changed to "The Town should endeavor to contribute any new growth in excess of 1 percent of prior year's general fund budget to capital expenditures or reserves."
- Town departments that charge fees (Enterprise Funds and recreation programs, for example) shall annually review their fee schedules and propose adjustments when needed to ensure coverage of service costs and endeavor to generate retained earnings of 3-5% of prior year's enterprise fund budgets for asset replacement.
- At the annual Tax Classification Hearing, the Select Board shall request an update from the Board of Assessors on the balance of the overlay account
- Use available funds to the greatest extent possible to reduce the amount of borrowing on all debt-financed projects
- Confine long-term borrowing to capital improvements and projects that cost at least \$100,000 and that have useful lifespans of at least ten years or whose lifespans will be prolonged by at least ten years.

NOTE: is this too aspirational / infeasible? Might we make the notional 1% a value that the Select Board initially sets at lower bar, and increases as we gain more discipline and debt within the levy capacity? (Back of envelope: 1% of prior years general fund revenue is ~ \$1M. Only purchases of around \$20M or more would have first year Principal payment of > \$1M. ?? So this would say Broadacres, Sewataro would not have qualified for a debt exclusion.)

- 25 Debt exclusion circumstances
 - Restrict debt exclusion borrowing to proposals which meet all three of these criteria:
 - (1) useful life of 20 years or more;
 - (2) estimated cost of the **principal payment in the first year** of the debt issuance must be greater than **1% of the prior year's general fund revenue** ; and
 - (3) the expenditure is either for town-owned land, buildings, or infrastructure or for a LSRHS capital assessment.
 - The policy of the Select Board shall be to include sufficient debt capacity within the levy, such that capital items can be more predictably funded.
- 26 Debt within the levy
 - As debt within the levy decreases annually, this amount shall be used for capital, future debt, or set aside for future capital.
- 27 Total debt service limit
 - 1.Total debt service, including debt exclusions and any self-supporting debt, shall be limited to 10 percent of general fund revenues, with a target balance of 5-7 percent.
 - The Town will limit bond maturities to no more than 10 years, except for major buildings, water and water facility projects, land acquisitions, and other purposes in accordance with the useful life borrowing limit guidelines published by the Division of Local Services (DLS).
- 28 Bond term limit 10 years except for...
- 29 Debt re-funding options
 - Issue debt with optional call dates no later than 10 years from issue
- 30 Annual Capital Spending Target
 - Annually, the minimum level of capital funding (spending) the town should target year to year should be equivalent to 6% of the prior year's general fund budget, (drawn equally from within-levy debt and cash capital sources).
- 31 Requirement for adding item to CIB and CIP list
 - require a Capital Project Submission Sheet for every item listed on CIB (this year) and CIP (5 years plan)
 - The CIP shall not include items that cost less than \$20,000 or have a useful life of less than 5 years. Items that do not meet this threshold should be included within the Town's operating budget.
- 32 CIP inclusion / exclusion threshold

- 33 require potential funding sources including CPA eligibility be in the CIP (for each project submission)

Alongside the CIP prioritization, potential Funding Sources shall be identified. Wherever possible, funding sources should be derived from 'cash capital' and within levy debt funding options. Funding sources for capital may include:

 - Community Preservation Act (CPA) funds (if eligible; Open Space, Recreation, Historic)
 - Town Manager's Capital Budget (items <\$100K)
 - New growth dedicated to capital
 - Capital Stabilization Fund
 - Special-purpose stabilization funds
 - Free Cash
 - In-levy Debt
 - Dedicated revenue sources (i.e. Sewataro revenue share).
 - Capital Exclusion
 - Debt Exclusion

- 34 put maintenance and small, shorter life capital in Dept budget

The CIP shall not include items deemed to be departmental maintenance. Rather, such smaller, shorter life maintenance items should be included in departmental budgets

- 35 do not include / itemize LSRHS capital in Sudbury CIP

LSRHS capital assets, while funded by Sudbury and Lincoln taxpayers, are not to be itemized in the Town of Sudbury Capital Improvement Plan. Rather, a single line item per year in each of the 5 and 15 year plans shall represent Sudbury's contribution to LSRHS's own independent capital plan (We did not choose to do this).

- 36 Transparency of CIP edits

Annually, the 5 year capital improvement plan shall be posted and accessible for public view on town website for public review at all times, reflecting updates for any changes made. The Capital Project Submission Sheet for each project on the 5 year CIP shall be posted and linked from the CIP.

or eliminate this step from policies: "The Town Manager will submit a capital program to the Capital Improvement Advisory Committee (CIAC). The proposed program will detail each capital project, the estimated cost, description and funding. **** POLICY DECISION – IF WE FOLLOW DLS TAB'S RECOMMENDATION TO DISCONTINUE CIAC FOR LEANER, CENTRALIZED PROCESS / EMPOWERED TOWN MANAGER... THEN CAN ELIMINATE THIS STEP OF SUBMITTING TO CIAC. ****"

- 37 Continue CIAC?

- 38 Deadlines confirm Jan 31 for articles for CIB, Feb 5 bylaw to send to Fincom appropriate and compatible dates
- 39 Cash Prescriptive Use of Free Cash (Wheel of Free Cash) Decided to keep out of Policies, more appropriate for How to Get There document
Decided not to address in Policies, other than to list M.G.L. c. 40 § 5B with laws we comply with. *** DLS option... if we want to divert to Capital Stabilization, we could accept 4th para of ... M.G.L. c. 40 § 5B and specify a percentage of each sale (of moveable property e.g. Vehicles that will be dedicated, without further appropriation, to the capital stabilization fund.
Town Manager shall maintain an inventory of all 'capital assets" (see Financial Policies Draft Appendix for definition).
- 40 Moveable property
- 41 Capital Asset Inventory
- 42 Debt Schedule Length Policy Removed policy of "The Town will attempt to maintain a long-term debt schedule so that at least 50 percent of outstanding principal will be paid within 10 years."

Changed to 3. For non-excluded debt the Town will generally choose terms less than 20 years and structure as level principal payments, so that over time the annual debt payment goes down, opening up capacity for future capital.

Section	Threshold/Target	Policy Value	Dennis Current Value
Financial RESERVES policy	maintain overall reserves in the level of [X-Y%] of the prior year General Fund budget	10-12%	9.91%
Financial RESERVES.B.Free Cash	maintaining its free cash in the range of [X-Y%] of the prior year's General Fund budget.	3-5%	4.18%
Financial RESERVES.B.Free Cash	should appropriate any free cash excess above [X%] of the General Fund budget to reserves, to offset unfunded liabilities, or to set aside for existing debt.	5%	
Financial RESERVES.C.Stabilization Fund (and FORECASTING.A.Revenue Guidelines)	endeavor to maintain a minimum balance of [X%] of the prior year's General Fund budget in its general stabilization fund	5%	5.24%
Financial RESERVES.C.Stabilization Fund	pay outright for moderate-range (under \$X) capital expenditures [through Capital Stabilization Fund]	\$1M	
Financial RESERVES.C.Stabilization Fund (and FORECASTING.A.Revenue Guidelines)	endeavor to achieve and maintain a combined target balance for all capital-related special purpose stabilization funds equal to [X%] of prior year General Fund budget	2%	0.49%
FORECASTING.A.Revenue Guidelines	Annual Capital Spending (non-debt; target of X% of prior year's General Fund budget	3%	3.06%
FORECASTING.A.Revenue Guidelines	endeavor to contribute any new growth in excess of X% of prior year's General Fund budget to capital expenditures or reserves	1%	
FORECASTING.A.Revenue Guidelines	endeavor to generate retained earnings of [X-Y%] of prior year's enterprise fund budgets for asset replacement	3-5%	8.95%
DEBT MANAGEMENT.A.Debt Financing	Confine long-term borrowing to capital improvements and projects that cost at least[\$X] and that have useful lifespans of at least [Y] years or whose lifespans will be prolonged by at least [Z] years.	\$100,000, ten years, ten years	
DEBT MANAGEMENT.A.Debt Financing	Restrict debt exclusion borrowing to proposals which meet all three of these criteria: (1) useful life of [X] years or more (2) estimated cost of the principal payment in the first year of the debt issuance greater than [Y%] of the prior year's General Fund revenue.	20 years, 1%	
DEBT MANAGEMENT.B.Debt Limits and Targets	Total annual debt service, including debt exclusions and any self-supporting debt, shall be limited to [X%] of General Fund revenues, with a reasonable range of [Y-2%]	10%, 5-7%	2.27%
DEBT MANAGEMENT.B.Debt Limits and Targets	As dictated by state statute MGL ch 44 section 10, the Town's debt limit shall be [X%] of its most recent equalized valuation	5%	
DEBT MANAGEMENT.B.Debt Limits and Targets (and DEBT MANAGEMENT.A.Debt Financing)	endeavor to gradually and consistently pursue future debt issuances financed by within-levy dollars with a target of [X%] of prior year's General Fund budget	3%	0.23%
DEBT MANAGEMENT.C.Structure and Term of Debt	The Town will limit bond maturities to no more than [X years], except for major buildings, water and water facility projects, land acquisitions, and other purposes in accordance with the useful life borrowing limit guidelines published by the Division of Local Services (DLS).	10 years	
DEBT MANAGEMENT.C.Structure and Term of Debt	For non-excluded debt the Town will generally choose terms less than [X years] and structure as level principal payments, so that over time the annual debt payment goes down, opening up capacity for future capital	20 years	
DEBT MANAGEMENT.D.Bond Refunding	Issue debt with optional call dates no later than [X years] from issue	10 years	
DEBT MANAGEMENT.F.Reporting	The Finance Director, with the Town's financial advisor, will file the annual audit and official disclosure statement within [X days] of the end of the fiscal year	270 days	
CAPITAL ASSETS.Applicability (and CAPITAL ASSETS.A.Capital Improvement Plan)	In order to be included in Sudbury's Capital Improvement Program, Capital Assets must cost [\$X] or more and have a useful life of [Y or more years]. Items or improvements that do not meet this threshold should be included within the Town's operating budget. // The CIP shall not include items that cost less than [\$X] or have a useful life of less than [Y years]. Items that do not meet this threshold should be included within the Town's operating budget.	\$20,000, 5 years	
CAPITAL ASSETS.A.Capital Improvement Plan	Annually, the minimum level of capital spending the town should target year to year should be equivalent to [X%] of the prior year's General Fund budget, drawn [equally] from within-levy debt and cash capital sources. The [X%] target shall guide how much capital spending can be planned in each year of the CIP	6%, equally	5.33%
CAPITAL ASSETS.A.Capital Improvement Plan	Town Manager's Capital Budget (items < [\$X])	\$100K	
CAPITAL ASSETS.A.Capital Improvement Plan	Town Manager's Capital Budget (items < [\$X] in a single year or < [\$Y] over multiple years, as per General Bylaws Section 2, Article XXV Capital Planning)	\$100K, \$200K	

This is the combined amount. The Pool and Field Maintenance Funds had NEGATIVE Free Cash (fund deficits).

Section	Threshold/Target	Policy Value	Dennis Current Value
Financial RESERVES policy	maintain overall reserves in the level of [X-Y%] of the prior year General Fund budget	10-12%	9.91%
Financial RESERVES.B.Free Cash	maintaining its free cash in the range of [X-Y%] of the prior year's General Fund budget.	3-5%	4.18%
Financial RESERVES.C.Stabilization Fund (and FORECASTING.A.Revenue Guidelines)	endeavor to maintain a minimum balance of [X%] of the prior year's General Fund budget in its general stabilization fund	5%	5.24%
Financial RESERVES.C.Stabilization Fund (and FORECASTING.A.Revenue Guidelines)	endeavor to achieve and maintain a combined target balance for all capital-related special purpose stabilization funds equal to [X%] of prior year General Fund budget	2%	0.49%
FORECASTING.A.Revenue Guidelines	Annual Capital Spending (non-debt; target of X% of prior year's General Fund budget	3%	3.06%
FORECASTING.A.Revenue Guidelines	endeavor to generate retained earnings of [X-Y%] of prior year's enterprise fund budgets for asset replacement	3-5%	8.95%
DEBT MANAGEMENT.B.Debt Limits and Targets	Total annual debt service, including debt exclusions and any self-supporting debt, shall be limited to [X%] of General Fund revenues, with a reasonable range of [Y-Z%]	10%, 5-7%	2.27%
DEBT MANAGEMENT.B.Debt Limits and Targets (and DEBT MANAGEMENT.A.Debt Financing)	endeavor to gradually and consistently pursue future debt issuances financed by within-levy dollars with a target of [X%] of prior year's General Fund budget	3%	0.23%
CAPITAL ASSETS.A.Capital Improvement Plan	Annually, the minimum level of capital spending the town should target year to year should be equivalent to [X%] of the prior year's General Fund budget, drawn [equally] from within-levy debt and cash capital sources. The [X%] target shall guide how much capital spending can be planned in each year of the CIP	6%, equally	5.33%

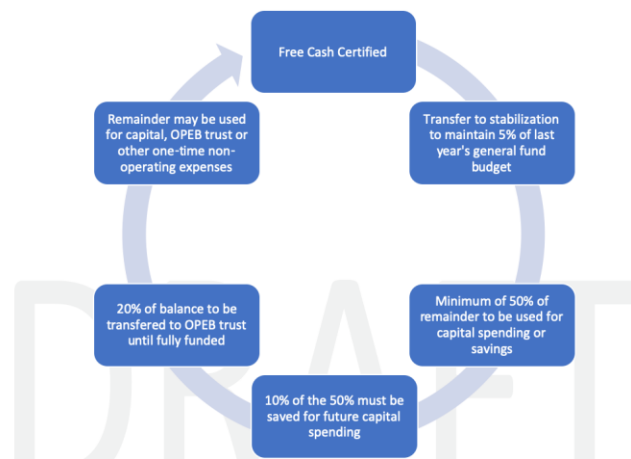
This is the combined amount. The Pool and Field Maintenance Funds had NEGATIVE Free Cash (fund deficits).

Q&A for Dennis Keohane (Sudbury Finance Director)
for Financial Policies Update Process 05.18.21

1. Q: Opinion on policy for replenishing Capital Stabilization Fund after we withdraw from it?
 - a. **A: policy to “evaluate on annual basis how to achieve goal” and after achieve level, then policy kicks in to try to evaluate annually maintaining goal. (don’t be too prescriptive in policy)**
 - b. **Evaluate on annual basis. If we have free cash, then we can replenish. Address in free cash policy. Goal to achieve the target. DON’T have policy ‘shall replenish in subsequent FY’. Policy establishes goal and our ability to do it is a function of free cash...**
 - c. **Suggest as part of Select Board annual goals, we set goals on progress to achieve/maintain targets.**
2. Q: The Town will strive to maintain overall reserves in the level of 8-10 percent of the annual operating budget. These reserves are comprised of Stabilization funds + Free Cash target + ~~Overlay funds~~.
 - a. Please comment on where 8-10 percent target came from:
 - i. Has this always been our policy?
 - ii. Is it consistent with DLS recommendation (pg 6)?: “A 5% minimum target for the general stabilization fund is reasonable only if there are also targets for other reserves, such that the total combined reserves target equates to 10 to 12% of the prior year’s general fund budget (i.e., the total operating budget minus CPA and enterprise funds). Here, “total combined reserves” refers to the total of free cash and the town’s general and special purpose stabilizations funds all together.” **A: The 8-10 relates to General Stabilization 5% plus DLS recommendation of 3-5 for free cash. Dennis says other stabilization funds (e.g. Capital Stabilization fund target pct) would be ADDITIVE to the 8-10%, tending to make overall 10-13%.**
 - b. Please confirm ‘overall reserves’ = Stabilization funds + Free Cash target + Overlay funds. Anything else? **A: Exclude Overlay from this calculus**
3. Year-to-year goal of maintaining its free cash in the range of 3-5 percent of the annual budget
 - a. where did 3-5% target come from? **DLS Recommendation**
4. “Town will limit its use of free cash to funding one-time expenditures (like capital projects or emergencies and other unanticipated expenditures) and will appropriate any excess above 5 percent of the annual budget to reserves or to offset unfunded liabilities”
 - a. Please confirm interpretation: is this saying 5 percent is the MAX free cash to leave, therefore automatically put anything above 5 percent towards...? **A. Dennis says Yes, anything above the 5% allocate to unfunded liabilities... In practice haven’t really been generating more than 5% free cash**

- b. i.e. by “offset unfunded liabilities” (OPEB etc?)
- c. Might we also put towards paying down Debt? **A: Can’t just prepay like a mortgage because of bonds and call date. But *could* set aside to use to pay debt in future years. e.g. if in policies, say evaluate on annual basis, determine if you have to raise the funds to pay debt from taxpayers.**
5. Do you recommend prescriptive “Wheel of Free Cash” be included in Financial Policies? **A: not in the policies, rather in the separate document / Bridge letter / plan to achieve goals of “How do we get there.” Dennis recommends this, and particularly some of the prescriptive stuff like ‘50% of remainder to X’ be kept out of policies, and rather put in the separate How to get there annual doc.**

Free Cash Flow Chart (from 'BOS Financial Policies 2019 mmranddkfinpolicies')



6. If any necessary withdrawal drives the balance below the minimum level, the withdrawal should be limited to one-third of the general stabilization fund balance. Replenishment of the funds should be made annually at the Fall Town Meeting, or the earliest available meeting after Free Cash has been certified.
- Please elaborate on this.
 - Where did this guideline come from?
 - One-third at a time? E.g. one-third of balance, then another one-third of remaining balance if needed again?
 - Is more policy language needed to explain that regardless of how severe emergency need in any one fiscal year, max use 1/3 of stabilization fund? Is/should there be a policy about who to ask if need more? e.g. the Fincom, special town meeting?
- A: Dennis doesn't recall exactly where came from, but intent of policy is to prevent from using too much of general stabilization fund at one time.**
7. Please reconcile DLS statement (page 7) “all capital-related special purpose stabilization funds equal to 2% of prior year General Fund revenues” against your draft statement in Forecasting section A bullet 3 “Capital Stabilization Fund (target of 3% of operating budget)”

- a. Which one do you recommend? **A: in spirit was thinking a year's worth of usual capital spending in the Cap Stab. Could aspire to get to the point that every year you spend on capital the balance of Cap Stab from prior year. And that the levy just replenishes the Cap Stab Fund. E.g. if we had \$3M in Cap Stab Fund. That's the source of funding for next year's capital. And then next step is to replenish the Cap Stab Fund with \$3M from levy. No free cash for the usual capital. Only free cash for big nonrecurring...**
 - b. How to reconcile language? **A: Revenues is everything less ambulance receipts less free cash. Operating budget = appropriations.**
8. Capital Stabilization acceptable expenditures
- a. "Moderate range capital expenditures" – how to define?
 - b. Would you recommend a more concrete policy such as?:
 - i. (e.g. \$1M or less drawn) **A: Dennis agrees yes \$1M is good cutoff. Generally anything over \$1M is something you want to bond.**
 - ii. Given that the target balance of CSF is 2% of Gen Fund, could alternatively phrase as "capital expenditures of less than half of the CSF may be used?"
9. Capital Stabilization – achieving and maintaining/replenish target balance
- a. Please opine on how to go about initially achieving target balance
 - i. Should such approach be documented inside Fin Policies?
 - 1. (or keep out, into separate Howto doc...?) **A: not in the policies, rather in the separate document / Bridge letter / plan to achieve goals of "How do we get there. Dennis recommends this, and particularly some of the prescriptive wording like '50% of remainder to X' be kept out of policies, and rather put in the separate How to get there annual doc.**
 - b. Replenishment policy
 - i. Please suggest written policy (as with general Stabilization Fund?) for Replenishing Capital Stabilization Fund
 - 1. Once achieved
 - 2. As we progress towards the target balance and perhaps cheat and take from it along the way **A: policy to "evaluate on annual basis how to achieve goal" and after achieve level, then policy kicks in to try to evaluate annually maintaining goal. (don't be too prescriptive in policy) Evaluate on annual basis. If we have free cash, then we can replenish. Address in free cash policy. Goal to achieve the target. DON'T have policy 'shall replenish in subsequent FY'. Policy establishes goal and our ability a function of free cash... Suggest as part of Select Board annual goals, we set goals on progress to achieve/maintain targets**
 - 3.

10. Special Purpose Stabilization Funds

- a. Would you recommend keeping Turf Stabilization Fund separate from Capital Stabilization Fund? (How many Special Purpose Stabilization Funds are ok?) **A. Dennis thinks ok to keep Turf fund. Trying to get rid of would cause more problems. But agrees with DLS don't create a bunch more special purpose stabilization funds.**

11. Overlay Surplus (financial reserves)

- a. Please recommend clear consistent language concerning timing of Overlay Surplus. Compare the following:
 - i. Conclusion of each fiscal year (in section C. Overlay Surplus)
 - ii. Overlay Surplus section (silent on timing) **A: Dennis says best time to ask is in the Fall. After we set the tax rate Oct/Nov. Ask for the number, ask their opinion.**
- b. Who if anybody (the Board (of Assessors?) own vote?) restricts what the Overlay surplus can be used for? "Town's capital improvement plan or for any other one-time expense." **A: Mass General Law says any legal purpose. In current fiscal year, need TM to appropriate. "Town's capital improvement plan or for any other one-time expense." Was just a restatement of policy we state elsewhere**

12. Re: "Annual Capital Budget (target of 3% of operating budget)"

- a. Please reconcile this term and target versus how DLS breaks down on pg. 22 of DLS report

To have a successful CIP requires a community to develop its annual budgets with the intent of ensuring the due allocation of funds toward capital investment. Given the wide scope of services Sudbury provides and its access to low borrowing rates, we advise that the minimum level of capital funding the town should seek to achieve and then maintain year to year should be equivalent to 6% of the prior year's general fund revenue, drawn equally from within-levy debt and cash capital sources. Beyond this minimum target, the town should seek to further enhance its capital investment by supplementing it with other revenue streams, such as the CPA program, state and federal grants, donations as they are offered, and so on. The table below shows the gaps between the town's recent capital investment totals and the recommended targets.

General Fund Capital Investment
vs. Target Funding Levels, FY2018-FY2020

	FY2018	FY2019	FY2020	Targets
Prior Year General Fund Revenues:	94,025,172	100,052,644	102,000,958	
Capital Funding Sources				
Excluded Debt	3,297,860	2,945,115	2,935,815	Excluded Debt
% of prior year revenues	3.51%	2.94%	2.88%	no target
Nonexcluded Debt	155,190	155,510	154,610	Nonexcluded Debt
% of prior year revenues	0.17%	0.16%	0.15%	3%
Free Cash +	1,962,000	1,426,500	570,000	
Tax Levy	413,190	422,000	745,000	Cash Capital
Cash Capital Total	2,375,190	1,848,500	1,315,000	3%
% of prior year revenues	2.53%	1.85%	1.29%	
Capital Total	5,828,240	4,949,125	4,405,425	Capital Total
% of prior year revenues	6.20%	4.95%	4.32%	6%

A: Dennis interprets, should be spending 6M per year including debt on capital. (if your total budget 100M.)

- b. Please opine/confirm your intention about allocating one-time revenues to 4 or 5 bullets.

Attachment 7.d: Dennis QandA-051821 (4695 : Financial policies discussion)

- i. Are these in priority order?
 - ii. Three of these are RESERVE funds. (Gen Stab, Cap Stab, OPEB)
 - iii. “Annual Capital Budget” represents this year EXPENDITURES
A: Town manager’s capital operating budget plus any other budget articles that are capital.
 - iv. Correct?
- 13. Allocating “one-time revenues” to prepay Debt
 - a. Would we ever do this, have we ever done this? paying off more than the required debt payment in a given year (i.e. prepaying)
 - b. i.e. Sewataro variable revenue share, using to offset its Debt payments
A: Don’t create Enterprise fund. But in policy a specific policy on Sewataro saying that setting aside revenues so that we will not raise via levy. E.g. will NOT raise the full amount required for bond payment for Sewataro in levy. Rather if we owe \$500K, take in \$120K from Sew revenues. And only raise \$380K. Even though the state says we have levy limit of X, our policy says limit ourselves to raise X minus \$120K.
- 14. Allocating New Growth revenues towards capital
 - a. DLS recommendation on page 23
 - b. PROPOSED policy in Forecasting/Revenue guidelines section: New growth (residential or commercial) permanently adds to the tax base. The Town should attempt to dedicate 50 to 75% of all (commercial?) new growth levy amounts to capital expenditures or reserves.
 - c. QUESTION: if we formalized such policy for New Growth, how would this impact our current budgeting approach? (any unintended negative consequence?) **A: Dennis suggests, maybe any new growth in excess of 0.5% of prior year levy goes to capital...(could put a fixed number in there... e.g. 600K but would have to revisit every few yrs..)**
- 15. Vehicle surplus -> Moveable property MGL to divert to Capital Stabilization.
 - a. Do you recommend doing this? (we propose in section Forecasting, Revenue Guidelines)
 - b. Pg. 21 of DLS discussion...
 - c. To retain these revenues for future purchases of the same types of assets, the select board could sponsor a warrant article to accept the fourth paragraph of M.G.L. c. 40 § 5B and specify a percentage of each sale that will be dedicated, without further appropriation, to the capital stabilization fund.
- 16. “Town departments that charge fees (Enterprise Funds and recreation programs, for example...)”
 - a. Discuss reasonable goal on cost recovery
 - b. Recall this conversation at Jan 23, 2021 Select Board mtg:
 - i. Can fees be set so there is a contribution to capital expenses associated with the Enterprise? **A. Dennis: hope to generate retained earnings so you have a little extra. Dennis notes 2 of the 3 enterprise funds haven’t been self-sustaining. Transfer station has been sustaining, with some retained earnings.**

- ii. Endeavor to retain funds for asset replacement **A: *Dennis fine with this language.***
- iii. Definition of enterprise fund? Subsidized by levy or self-sustaining? Currently enterprise funds cover cost of employees and benefits. **A. *An enterprise fund is allowed to go into deficit for one year. But not 2 yrs in a row. In second year required to fund it from levy***

17. Overlay Contribution

- a. Re: “the Board of Assessors shall vote in an open meeting to authorize a contribution to the overlay account as part of the budget process and to raise it without appropriation on the Town’s Tax Recap Sheet. The Principal Assessor will propose this annual overlay amount to the Board of Assessors based on the following”
- b. WHEN does the BofA meet as part of the budget process to authorize contribution to the overlay account? (Can the Financial Policies be more specific on what month range/deadline?) **A: *As above, Dennis says best time to ask is in the Fall. After we set the tax rate Oct/Nov. Ask for the number, ask their opinion.***

18. Excess Overlay

- a. Re: “Annually, the Finance Director and Director of Assessing will conduct an analysis to see if there is any excess in the overlay account”
 - i. WHEN does/should this analysis happen? **A: *As above, Dennis says best time to ask is in the Fall. After we set the tax rate Oct/Nov. Ask for the number, ask their opinion.***

19. Overlay Surplus timing

- a. Re: the Board of Assessors shall formally vote in an open meeting to certify the amount to transfer to overlay surplus.
 - i. WHEN exactly does vote to certify Overlay SURPLUS occur in process? this statement 'shall' implies it is required to happen and required to notify Town Mgr and Fin Dir.
- b. Re: a Proposed Select Board policy: “At the beginning of the budget cycle, the Select Board shall request an annual update from the Board of Assessors on the balance of the overlay account.”
 - i. WHEN exactly would you recommend this request and determination occur? **A: *As above, Dennis says best time to ask is in the Fall. After we set the tax rate Oct/Nov. Ask for the number, ask their opinion.***

20. Overlay Surplus appropriation

- a. verify Town Meeting (and only Town Meeting) is the only way to use Overlay Surplus funds during fiscal year (e.g. not the FinCom, or Select Board by their own vote...) **A. *Correct only Town Meeting***

21. re: “debt obligations permitted to be issued under Massachusetts law, shall only be issued to construct, reconstruct, or purchase capital assets that cannot be acquired with current revenues”

- a. Question 1: should we reference a specific MGL? **A: *if you want but saying Massachusetts law ok.***

- b. Question 2: confirm that “issue debt” only for capital is distinct from allowing Town to ‘take on debt’ through other borrowing programs like the state CWMP low-interest loan? **A. Not that literal; it’s ok to take loan for CWMP as the Plan considered a part of construction process.**
22. Re: “Issue long-term debt only for objects or purposes authorized by state law and only when the financing sources have been clearly identified”
- a. Pls explain this statement. (is it obvious e.g. can’t Issue a bond if you don’t know potential bidders?) **A: We can strike this phrase. It does not add any value.**
23. Re: DLS recommendation of restrictive criteria for Debt Exclusions
- a. DLS (aspirational?) suggested criteria was: “Restrict debt exclusion borrowing to proposals which meet all three of these criteria: (1) useful life of 20 years or more; (2) estimated cost of the principal payment in the first year of the debt issuance must be greater than 1% of the prior year’s general fund revenue; and (3) the expenditure is either for town-owned land, buildings, or infrastructure or for a LSRHS capital assessment.”
- b. Your opinion? Are criteria (2) unreasonable, too restrictive? 1% of prior year’s general fund revenue is ~ \$1M. Only purchases of \$20M or more would have first year Principal payment of > \$1M? So this would say Broadacres, Sewataro would not have qualified for a debt exclusion.
A: Dennis thinks good policy, but it is not achievable until we have more in levy debt capacity. It is a good financial policy, but each year for a while we may need to acknowledge policy and be able to identify why we cannot pursue it (i.e. we are working toward more in-levy debt.)
24. Re: “Total annual debt service, including debt exclusions and any self-supporting debt, shall be limited to 10 percent of general fund revenues, with a target balance of 5-7 percent”
- a. We added ‘annual’. Correct?
- b. Why 10%? Did we make up the number 10 percent or did this come from some reference?
- c. what is our actual percentage in past few years?
A: 10% is a best practice (state guideline). It is on an annual basis. We are nowhere near this. We are close to 3%. If there is a “target balance” (i.e. 5%) it is to allow to pay for big projects and with the knowledge that we need to pay for big capital. Would not advocate for getting near 10%. Instead of saying “target” say goal is to keep it at less than 5-7%. Debt is o.k. particularly with low interest rates. Debt allows for project to be paid over time and more tax payers.
25. Re: “the Town shall endeavor to gradually and consistently pursue future debt issuances financed by within-levy dollars with a target of 3% of prior year’s General Fund.”
- a. Is 3% good?
A: Yes, it is good, but it will take time to get there.
26. re: “The Town will attempt to maintain a long-term debt schedule so that at least 50 percent of outstanding principal will be paid within ten years.”

- a. Clarify 'long-term debt schedule'
 - b. Is this 50% of outstanding principal paid within 10 years good policy?
A: It is the current policy and basically means aim for no more than 20 years and level principal. Dennis feels some things should be 30-year bonds. He does not think it needs to be in policy in this way to have 20-year limit (perhaps only for in-levy debt projects). There could be a blend. Excluded debt could be longer. In compliance with Mass General Law X, items can be bonded with term of xyz. Whether or not something is level debt or level principal can be evaluated on a case-by-case basis.
27. Re: "Any vote to authorize borrowing will include authorization to reduce the amount of the borrowing by the amount of the net premium and accrued interest"
- a. Please explain.
A: This is Mass General Law, we do it in practice.
28. Re: "follow federal regulations and set time frames for spending borrowed funds to avoid committing arbitrage, paying rebates, fines and penalties to the federal government, and jeopardizing any debt issuance's tax-exempt status"
- a. Confirm this is just boilerplate language from somewhere? Don't worry about it?
A: This is Mass General Law, we must follow. We can't just borrow money and sit on it.
29. Re: "Issue debt with optional call dates no later than 10 years from issue"
- a. Pls explain in layman's terms. Do you agree?
A: This is standard. You can't prepay debt until 10 years (the call date). 10-year call dates allow for more favorable rates so can refinance. If you do less than 10 years for a call date you less favorable bids as far as interest rate.
30. Re: "Use any net premium and accrued interest to reduce the amount of the refunding."
- a. Pls explain in layman's terms. Do you agree?
A: This is standard as before.
31. Re: "The Finance Director, with the Town's financial advisor, will file the annual audit and official disclosure statement within 270 days of the end of the fiscal year."
- a. File with whom? (assume it's obvious...)
A: Our advisor is Unibank. They coordinate with our bond council and do a lot of our reporting with debt issuers and rating agencies.
32. Re: "The Town's retirement fund"
- a. OPEB is acknowledged as underfunded. How is 'the Town's retirement fund' funded? Are there employee contributions? Is the retirement fund 'fully funded' (is there a guaranteed pension amount?)
A: There is the retirement plan (mandate from state that it must be funded). OPEB is premiums for health and life insurance – no mandate to fund. They are both not fully funded on actuarial basis. Middlesex Retirement scheduled to be fully funded by 2038. Both are reevaluated every 2 years. There are the current contributions for

current retirees to the OPEB Trust and the ~\$600K we set aside for the future. We pay the current obligation for current retirees. There is no mandate that requires us to set aside extra money. If Sudbury doesn't contribute for future, it could look less favorable to bond agencies (particularly if other towns are).

For the Town's retirement fund employees have a contribution ~9% and 2% of over \$30K, and Town has obligation to pay out a defined benefit. The Town pays into the Middlesex Retirement Fund.

33. Re: "APPLICABILITY This policy applies to the Town Manager as the Town's chief budget decision maker. It also applies to the job responsibilities of the Finance Director, School Superintendent, School Business Manager, Select Board, School Committee, and Finance Committee"
- a. Confirm LSRHS is not subject to this policy?
A: LS is a separate legal entity, and these policies do not apply to them. They have their own governing body. We contribute to them.
34. Proposed "Annually, the minimum level of capital funding (spending) the town should target year to year should be equivalent to 6% of the prior year's general fund revenue, (drawn equally from within-levy debt and cash capital sources)."
- a. Your opinion? How feasible, aggressive?
A: Dennis thinks this makes sense, but it will take time to achieve this since we do not have much debt in the levy. It would be about \$6MM, and right now we are around \$5MM including excluded debt.
35. Re: "The Town Manager shall establish criteria to determine capital asset prioritization"
- a. Please identify the currently used criteria
We currently have criteria that are similar (we have about four now).
 - b. DLS suggests: "DLS suggests Select Board est criteria including but not limited to:
 - c. - mitigation of safety hazards
 - d. - legal compliance
 - e. - operating cost reduction
 - f. - service or efficiency improvement
 - g. - availability of outside funding sources
 - i. Not a part of evaluation now
 - h. - conformance to asset replacement schedule
 - i. Not as much a part of evaluation now as it is difficult with limited funding.
 - ii.
 - i. - enhancement of quality of life"
 - i. Talk about in context of nice to have vs need to have.
 - j. QUESTION: what do you think of this list? Useful? Any value added to the doc?

A: Dennis thinks a list like this makes sense. The order makes sense. We look at it a bit more broadly now but do touch on these. If you apply numbers, you may never get to lower on list. (So, it does require some subjectivity or flexibility.) This year items were "color-coated."

36. Require a Capital Project Submission Sheet for every item listed on CIB (this year) and CIP (5 years plan).

- a. Does this happen now? Are items making it onto the CIB and CIP spreadsheet that don't have accompanying submission sheet filed? Right now we have a Form A with 1-5 urgency score.

A: Process was modified slightly this year. Each year put their items in numbered priority. Then full group discussed how each fell into key categories and color-coated the according to priority across 4 categories.

For each item on an annual basis there is a Form A, but future items (i.e. 5 years out) may not have a form now. Now not a big deal to submit a form for each one, but some may not have a lot on them or may have estimates (not specific quotes).

37. Would acquiring Open Space ever be in the Capital Improvement Plan?

A: No, not unless it was something planned well in advance with a known date of acquisition. Otherwise, it would just be on the Open Space and Recreation plan.

38. Re: proposed "DLS: put maintenance in Department budgets... <--- this would be a significant policy change Rather, such smaller, shorter life maintenance items should be included in Departmental budget capital line item. [DECISION: adopt this DLS section B-1 recommendation of putting in Dept budget???: clearly define what items included in capital plan]"

- a. How radical would this be? Do department budgets currently have line items that cover ALL items under \$20K or 5 years?
- b. Department Budgets per DLS recommendation, should have capital line items for these smaller, shorter life maintenance items...
- c. QUESTION: do we currently have such a line item per department budget?
- d. Type of expense e.g. maintenance and anticipated replacement. Maintenance (not huge unanticipated maintenance...) is recommended by DLS to go in Dept OPERATING budgets.
- e. Replacement of trucks (<100K?), ambulances/firetrucks <\$1M

A: This is not a radical idea. Most departments (but not all) have line items in their budgets for smaller budget items. Not all departments have maintenance needs.

39. Re: proposed "LSRHS capital assets, while funded by Sudbury and Lincoln taxpayers, are not to be itemized in the Town of Sudbury Capital Improvement Plan. Rather, a single line item per year in each of the 5- and 15-year plans shall represent Sudbury's contribution to LSRHS's own independent capital plan"

- a. Opinion? Good idea

A: They are a separate legal entity. Right now LSRHS items are included on the capital plan just like any other item. (This started 6-7 years ago). The Town still would need to decide whether or not to fund them regardless. The one line item could include all the capital items in one article. This means all items might not be presented separately. However, this one should be thought through. It can be challenging to blend them together sometimes, but it is good to know what they

have coming up. Perhaps it could be a separate section of the capital plan so people realize we are separate entities. In the future, the roof will come forward which will require debt (so will have to be a separate vote).

40. Risk Management Program

- a. What is the Risk Management Program (besides holding insurance policies...) who is the Risk Manager? (Town Manager?) Does Risk Management flow down to various accountable departments?

A: This is more of an overriding concept. We don't have a specific risk manager. The Asst Town Manager handles insurance.

41. Continuation of CIAC

- a. Eliminate this step? "The Town Manager will submit a capital program to the Capital Improvement Advisory Committee (CIAC). The proposed program will detail each capital project, the estimated cost, description and funding."
- b. **** POLICY DECISION – IF WE FOLLOW DLS TAB'S RECOMMENDATION TO ABOLISH CIAC FOR LEANER, CENTRALIZED PROCESS / EMPOWERED TOWN MANAGER... THEN CAN ELIMINATE THIS STEP OF SUBMITTING TO CIAC. ***
- c. Opinion

A: This a judgement call. It may have been needed more before we had a "strong Town Manager." Ultimately, it is a judgement call by the Select Board.

42. OPEB Trust Fund

- a. How to determine policy of how much to contribute annually to OPEB Trust Fund? Roughly how to determine if (current balance and annual contribution) will be sufficient as a function of when, how many retirees roll on and off?
- b. Consider phrase "until it is fully funded as actuarially determined" (from 2019 draft)?
- c. Do you have a trend chart of fund balance, contributions per year, withdrawals per year and forecast future liabilities(withdrawals) in future years?
- d. How is the liability measured? What metric should be tracked to inform whether we are contributing enough?
- e. How to determine policy of how much to contribute annually to OPEB Trust Fund? Like what? How much to contribute each year? E.g. are we aiming for 70% of future need? How far off are we? Is there a metric/rule of thumb for 'usual' contribution level, distinct from 'catch up' contributions?

A: There is an actuarial evaluation. Now our annual contribution is about \$1.8MM. We appropriate for current retirees and \$1.2MM for future retirees and ~\$600K. "Normal costs" are how much we need to set aside for future benefits for current retirees. We are working towards the "annual required contribution." Back in 2015, we were trying to achieve this number (it fluctuates based on factors). As far as right amount, anything that is required above what we "need to pay" is a good thing. If we continue to put money aside eventually,

we will get to a point where we are fully funded. (Although it may take a long time such as 60 years). Amount we are putting away is reasonable and on high end vs peer communities. Now we have ~\$10MM set aside. In 2015, we were under \$1MM set aside so we have been steadily adding (\$600-800K between our contribution and investment earnings). Some of this is after a conversion of money from the old self insurance plan. In our “How we get there” future document we could add “we will continue contributing a certain baseline budget number...” Or a certain % of free cash over and above the baseline amount we contribute.

Dennis would consider putting more of budget into capital and more free cash into the future OPEB (since we have capital every year and is a known need.)



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

8: BFRT update

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: BFRT update by Beth Suedmeyer, Environmental Planner

Recommendations/Suggested Motion/Vote:

Background Information:
attached memo

Financial impact expected:

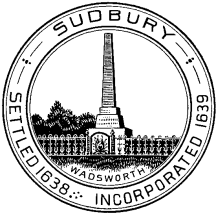
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM



Town of Sudbury

Planning and Community Development Department

Flynn Building
278 Old Sudbury Rd
Sudbury, MA 01776
978-639-3387
Fax: 978-443-0756

<http://www.sudbury.ma.us/planning>

TO: Select Board
FROM: Beth Suedmeyer, Environmental Planner, Planning and Community Development
RE: BFRT Design Project Update
DATE: July 9, 2021

I am pleased to provide this summary of project status in response to the request for an update on the Bruce Freeman Rail Trail (BFRT) Design Project (BFRT, Phase 2D, MassDOT ID 608164).

Design Schedule

As you are aware, the 75% project design of the rail trail from the Concord Town line to near Station Avenue was submitted to MassDOT on May 12, 2021. The MassDOT has completed their comments and the Project Manager provided access to MassDOT's comments on July 8, 2021. Once the Design Team has compiled and reviewed MassDOT's comments we'll hold a comment resolution meeting with MassDOT. We anticipate the comments will be resolved and the 100% design process will begin in Mid-August.

The project design must be "shovel ready" by October 2022 to take advantage of the state and federal funds for construction. The project is on track to achieve this milestone. A revised project schedule is in development and should be available next week. The current estimated advertising date, the target final design date, remains June 11, 2022. The schedule will be further revised, if needed, following the full MassDOT comment review and resolution.

ROW Process

As a result of the State and Federal funding through the Boston MPO, the ROW process is dictated by Federal Highway and not something the Town can advance prior to meeting required milestones. The Town still awaits information from the Rail Division and a draft lease from MassDOT. These are anticipated to be available later this month. The Town Meeting approval is needed to approve the Town entering into the corridor lease agreement and acquire or grant easements.

Based on preliminary comments from MassDOT ROW staff following their review of the 75% submission, the ROW process schedule will not warrant a fall Special Town Meeting. The 75% ROW plans must be approved and the lease and easement processes should further advance prior to Town Meeting votes being taken. The approval of the lease agreement and easements is presently planned for the May 2022 Annual Town Meeting, but the Design Team, with guidance from Town Counsel, will continue to evaluate the schedule and progress to make a recommendation to the Select Board if an earlier Special Town Meeting is preferable to optimally support the project.

We have already initiated discussions with the abutters who have private driveways crossing the corridor. As soon as the 75% design ROW plans are approved by MassDOT, we will begin to approach affected landowners about acquiring necessary easements.

I'll provide a few additional updates regarding the project's environmental permit process.

Notice of Intent

The draft Notice of Intent was submitted to MassDOT for review on June 16, 2021. MassDOT will be the permit applicant and they have confirmed they are in the process of reviewing and providing input/changes to the draft application. We expect we will have their input by the end of July to begin preparing final applications. The current schedule shows the submission of the application to Conservation Commission in October, but if we are able to expedite this submission we will.

Chapter 91 Determination

The request for determination is still under review by MassDEP, and it appears that a determination will be made in the next 30 days. MassDOT review of the modified design proposal for the Hop Brook Bridge resulted in no major comments or requests for changes.

As always, more information on the project and the 75% design plans may be found at the BFRT project webpage. <https://sudbury.ma.us/pcd/?p=354>

From: Len Simon
To: Select Board, BFRT Advisory Task Force, Town Manager, Beth Suedmeyer, Adam Duchesneau,
Re: BFRT
Date: July 12, 2021

I am writing after having read Project Manager Beth Suedmeyer's email of July 8, sent in response to my email of June 17.

I am still concerned that the information coming from the Project Manager is incomplete, confusing, or indefinite.

EASEMENTS

For instance, I wanted the Project Manager to confirm her earlier statement that a 'work around' for construction was possible if a resident refused an easement.

In response, Project Manager now says, "Yes, in most cases the design team will be able to adjust the design to work around it." So, how then could the project be advertised for construction if access is denied at some locations, and no 'work around' is feasible?

And, if the design team will need to adjust the design to 'work around' it, wouldn't that modification need to be included in the 100% and final design submissions to DOT? By delaying resolution of definitive easement access the final designs cannot be submitted. What good reason is there to put off securing the answer to that issue?

Would we not be in a better position having those answers sooner rather than later? In other words, there is a logical progression with easements being a necessary preliminary step to submitting the final design. Why is there so much secrecy of this issue? Why does there appear to be an effort not to deal with this issue directly?

It seems to me that clarification of the sequence of events, particularly as they relate to easements, is essential to making an informed decision regarding the timing of calling a town meeting. Otherwise, undesirable delays may thwart the will of the residents of Sudbury.

The Project Manager's email now says town meeting action is required on a number of issues: 1) private property easements, 2) town-owned property easements, and 3) lease approval. Why would it be appropriate to put off **any** of these matters beyond a fall town meeting, considering the remaining designs are due this year and town meeting approval is needed for the project to advance?

*The Select Board has the obligation to know if a town meeting vote in favor of **any of the above three issues** is required for the 100% design submission, or the final design submission? If so, for which issues and for which design submissions?*

Residents have a right to know that information as well, and should not be in the position of having to drag the answers out of staff and the Town Manager to get it.

Why is town meeting approval needed if an easement is allowed by a landowner? This seems to be an entirely new development. This was not the process in other towns on the BFRT and is not something the Project Manager had disclosed previously.

Most importantly, the question arises:

Could a landowner who denies an easement file a legal action that could tie the project up for months or years? Or stop the BFRT project, even temporarily?

The Select Board should raise this question with town counsel. A private property easement has not yet been denied so this is only for informational purposes. As the Project Manager noted, counsel should be providing explanations and making recommendations to the Select Board.

A list should be provided by the Project Manager to the Select Board and the BFRT Advisory Task Force detailing each property for which an easement is needed - those permitted by property owner and those refused by property owner.

The Town must have a Plan B in place for those landowners who would deny an easement, so as not to stop the construction of the BFRT.

Why are we only learning about of these project-critical questions requiring BOTH legal advice AND a town meeting action so very late in the process? The 100% design is due in 3 months.

The Project Manager had told the town that construction would begin in the summer of 2022. However, if a town meeting vote on any issue was required for submitting the remaining designs, and there was no fall or special town meeting, then the remaining designs could not be submitted until May 2022 at the very earliest. Then, DOT would want to review those designs before allowing the project to go out to bid. In that case, construction would not begin in 2022 as promised. And the programed FY 2022 funding year would close.

PERMITTING

Permitting by the Conservation Commission is required for the BFRT. It is not on their agenda for July 12, 2021, and their next meeting is July 26. Knowing this process can take several meetings, with potential legal challenges, it does not seem prudent to have waited this long to begin permitting.

CHAPTER 91

The Chapter 91 Application for Determination of Applicability was not filed with DEP until May 4, 2021, six or seven months after the Project Manager learned from Fuss & O'Neil it was an issue to secure DOT's approval for the BFRT. It has been more than 60 days since the Application was filed and it is still an open question. It should have been filed earlier.

The practice of allowing tasks to wait until the very last moment, and varying statements about what is required, have placed the entire BFRT project in jeopardy. Deadlines have routinely been moved back and missed. As you may recall, Sudbury was on the MPO's "At high risk for not making advertising deadline" (delinquency list) in 2020 and the BFRT 2D was again highlighted in purple earlier this year as not being ready.

The Bruce Freeman Rail Trail project has lacked transparency and candor with inconsistent explanations for delays.

In 2020 Town Meeting overwhelmingly voted to expedite the completion of the BFRT design, and so instructed staff and the Town Manager. That vote is still operative.

The Town Manger has said he is committed to completing the BFRT on time. Now his actions must match his words.



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

9: Comprehensive Plan presentation by Len Simon

REQUESTOR SECTION

Date of request:

Requestor: Resident Len Simon

Formal Title: "Comprehensive Plan" presentation by resident Len Simon

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

MEMO

From: Len Simon

To: Planning Board

Date: January 2, 2021

Updated May 4, 2021

COMPREHENSIVE PLAN FOR BRUCE FREEMAN RAIL TRAIL, MASS CENTRAL RAIL TRAIL, A CONNECTION TO ROUTE 20, A POCKET PARK, AND PLANNED DEVELOPMENT IN SUDBURY'S COMMERCIAL DISTRICT

INTRODUCTION

This memo will address multiple changes that are likely to occur in Sudbury's commercial district within the next 2 to 3 years. The purpose of the memo is to provide town planners, boards, commissions, and special committees, such as the Master Plan Steering Committee, with a common set of facts to allow them to develop an integrated plan, and keep current with multiple aspects of the Comprehensive Plan as it emerges. Adoption of a Comprehensive Plan will allow, for the first time, planning and implementation of changes that are on our doorstep, to optimize the appeal and vibrancy of central Sudbury.

One objective is to avoid the kinds of piecemeal changes that have plagued most of the Route 20 corridor, from Horsepond Road to Concord Road.

Within the next two to three years the following changes are likely to take place:

1. Construction of Phase 2D of the Bruce Freeman Rail Trail (BFRT), 4.6 miles, from the Concord/Sudbury line to the Mass Central corridor which should begin in the summer of 2022. Construction will require at least two construction seasons.
2. Construction of the Eversource underground high voltage transmission line, along the Mass Central right of way, from the Sudbury substation to the Hudson/Sudbury town line.
3. Upon completion of the underground transmission line, Eversource will install a gravel service road within the Mass Central right of way.

4. A hard surface will then be placed on top of the gravel service road by the Department of Conservation and Recreation (DCR) to serve as part of the Mass Central Rail Trail (Wayside Branch).
5. The (north-south) BFRT and the (east-west) Mass Central Rail Trail will form a T intersection at the 'diamond', a point 0.22 miles north of Rt. 20, along the (north-south) CSX corridor. The diamond is where the two railroad lines intersected. (See PowerPoint)

Now is the time to plan to upgrade the town-owned 0.22 mile of CSX corridor, which is now a walkable path, from the diamond to Rt. 20. The objectives are to:

1. Extend the aesthetic, safe, and functional design of the BFRT from the diamond to Rt. 20.
2. Avoid the need for BFRT and MassCentral Rail Trail users to divert onto Station Rd. and Union Ave., which are not pedestrian and bicycle-user safe.
3. Avoid the need for pedestrians and bicycle users to navigate the five driveway curb cuts between Union Avenue and the CSX corridor: Citizens Bank, West Sport, Jewelry Exchange, Sudbury Mobil Exxon Station.
4. Prepare for the eventual continuation of the BFRT south to the Framingham line.
5. Ensure the trail 100% emergency-vehicle and ADA accessible for all users.

Sudbury residents who have appropriated one million dollars for the design of the BFRT and voted for it at multiple town meetings and at the ballot box for more than 10 years, expect and deserve, safe and direct access throughout the full length of the rail trail.

Construction of the rail trail from the diamond to Rt. 20 will be paid by federal and state funds, just as the \$12,887,676 cost of the BFRT Phase 2D is now being paid for with federal and state funds.

In its current state, there is a direct, walkable path, varying in width, about 6 to 8 feet, from Station Road to Route 20. It was dry, end-to-end, when I walked and photographed it on March 26, 2021. When the BFRT and/or Mass Central Rail Trail users reach the location where the paths intersect, i.e., the diamond, trail users will use the readily visible, existing path to get to Route 20. However, it is not ADA compliant, nor emergency vehicle accessible. It will not be passable when foliated.

FOLLOW THIS LINK FOR PHOTOS OF CSX CORRIDOR FROM RT. 20 TO STATION ROAD, MARCH 23, 2021:

<https://photos.app.goo.gl/TtRz9XbHgbGTLb198>

Also, residents and visitors to the commercial district in Sudbury will have safe, direct access the BFRT and MassCentral Rail Trail. Upgrading to a MassDOT standard rail trail is safer and more direct than diverting along Rt. 20. to Union Avenue, turning north onto Union Avenue, then left onto Station Road. Union Avenue and Station Road do not have walkways.

Planning should incorporate access points and sufficient parking for both rail trails' users, thus avoiding interference with parking on existing commercial properties. A second, though no less important a consideration, is commercial development in the immediate vicinity of the CSX crossing of Rt. 20, next to Nobscot Road. A third set of considerations is the availability of sanitary facilities, bicycle parking, and ADA accessible amenities.

Existing pedestrian crossing and traffic controls at the intersection of Rt. 20, Nobscot Road, and the BFRT could be modified for access to the pocket park and the southward continuation of the CSX corridor.

It has been the practice of the Massachusetts Department of Transportation and the Department of Conservation and Recreation to include and fund trail access and parking needs in their rail trail designs.

The Department of Conservation and Recreation and MassDOT encourage the integration of spurs to increase accessibility and usage of rail trails.

A UNIQUE OPPORTUNITY

This is believed to be the first time two major multiuse paths, under the jurisdiction of two distinct public agencies has occurred. The expertise of both agencies should be combined and integrated with the Town's vision for a once-in-a-generation opportunity to enhance Sudbury's attractiveness and livability.

SPECIFIC OBJECTIVES:

1. Design and construction, to Mass DOT standards, of the 0.22 miles (1,200 feet) of the CSX corridor from the diamond to Rt. 20 to be part of the BFRT.

2. Incorporate, by design, a gate or similar structure at the southern end of the BFRT to prevent bicyclists and pedestrians from proceeding directly onto Rt. 20.
3. Confirm that MPO will approve funding for this multi-use trail, and that MassDOT will award the construction contract for this section of the BFRT.
4. Preserve historical significance of the area immediately adjacent to the diamond to make it a destination, similar to the pedestrian mall in West Concord where historical artifacts are displayed.
5. Acquisition of the former gas station located at the southwest corner of Rt. 20 and Nobscot Road for a 'pocket park', with provisions for use as a rest stop for trail users, bicyclists, and automobile and bicycle parking.

FOLLOW THIS LINK FOR PHOTOS OF ABANDONED GAS STATION AT INTERSECTION OF ROUTE 20 AND NOBSCOT ROAD:

<https://photos.app.goo.gl/dENrRy8H3tPg94zS6>

Summit Realty Partners Website for 465 Boston Post Road, Sudbury
<http://www.summitrealtypartners.com/Sudbury%20MA%20%20465%20Boston%20Post%20Road%2010.16.2019.pdf>

6. Permanent, accommodating free-standing sanitary facilities for trail users, visitors, and shoppers, withing the 'pocket park' at the former gas station location. Not portable bathrooms.
7. Potential acquisition of additional parcels, or partial parcels, to augment rail trail parking and access, i.e., Interstate Oil and Sullivan Tire.
8. A comprehensive pedestrian crossing and traffic control system at the intersection of Rt. 20 and Nobscot Road.
9. Encourage small business development that would provide services desirable to rail trail users in all seasons.
10. Interim and long-term planning for the 1.1-mile portion of the CSX corridor south of Rt. 20 to the Framingham line.

COMPREHENSIVE PLAN FOR DEVELOPMENT

BRUCE FREEMAN RAIL TRAIL, MASS CENTRAL RAIL TRAIL, THE COMMERCIAL DISTRICT

Len Simon
January 15, 2021

AREA OF COMPREHENSIVE PLAN



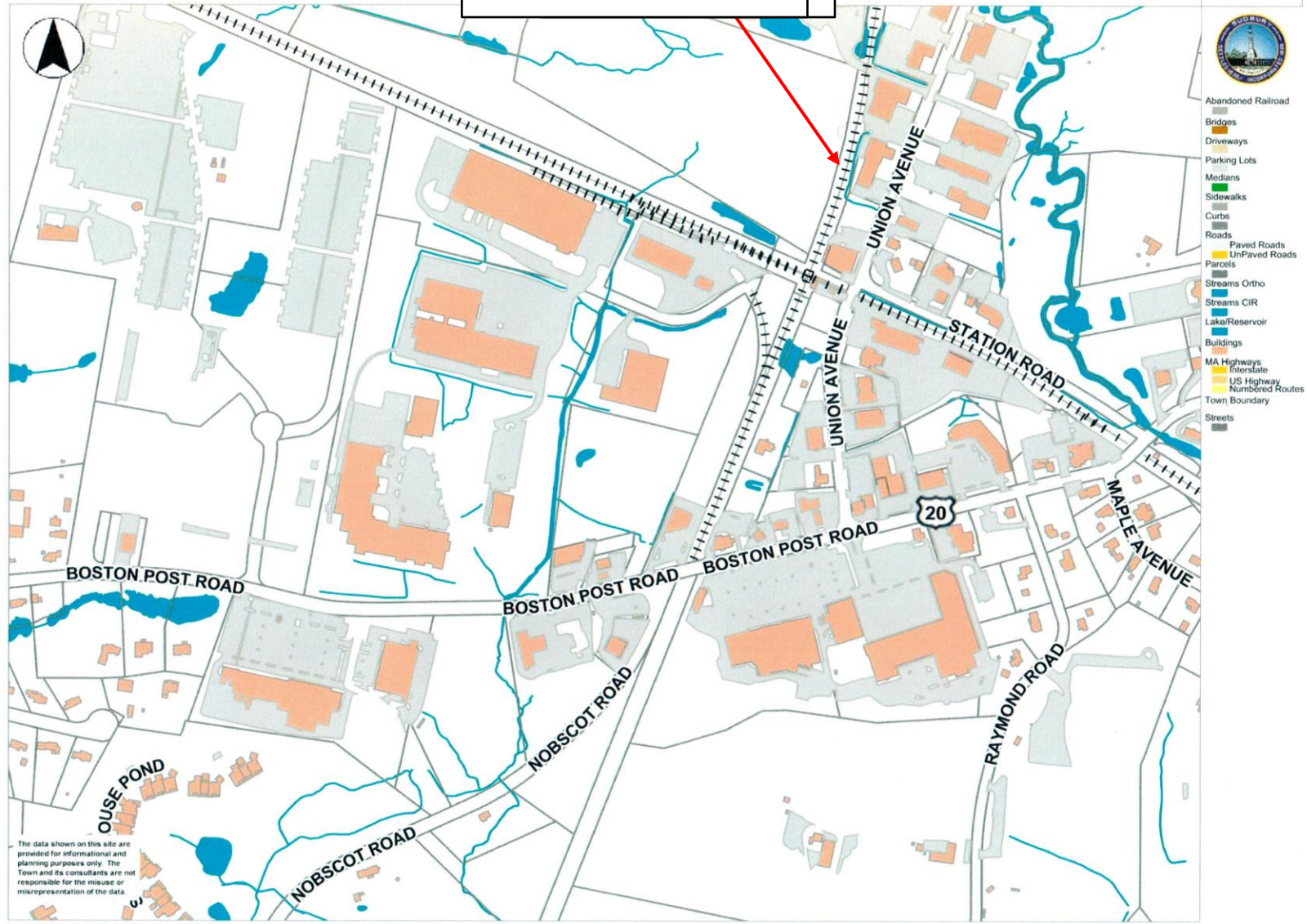
The data shown on this site are provided for informational and planning purposes only. The Town and its consultants are not responsible for the misuse or misrepresentation of the data.

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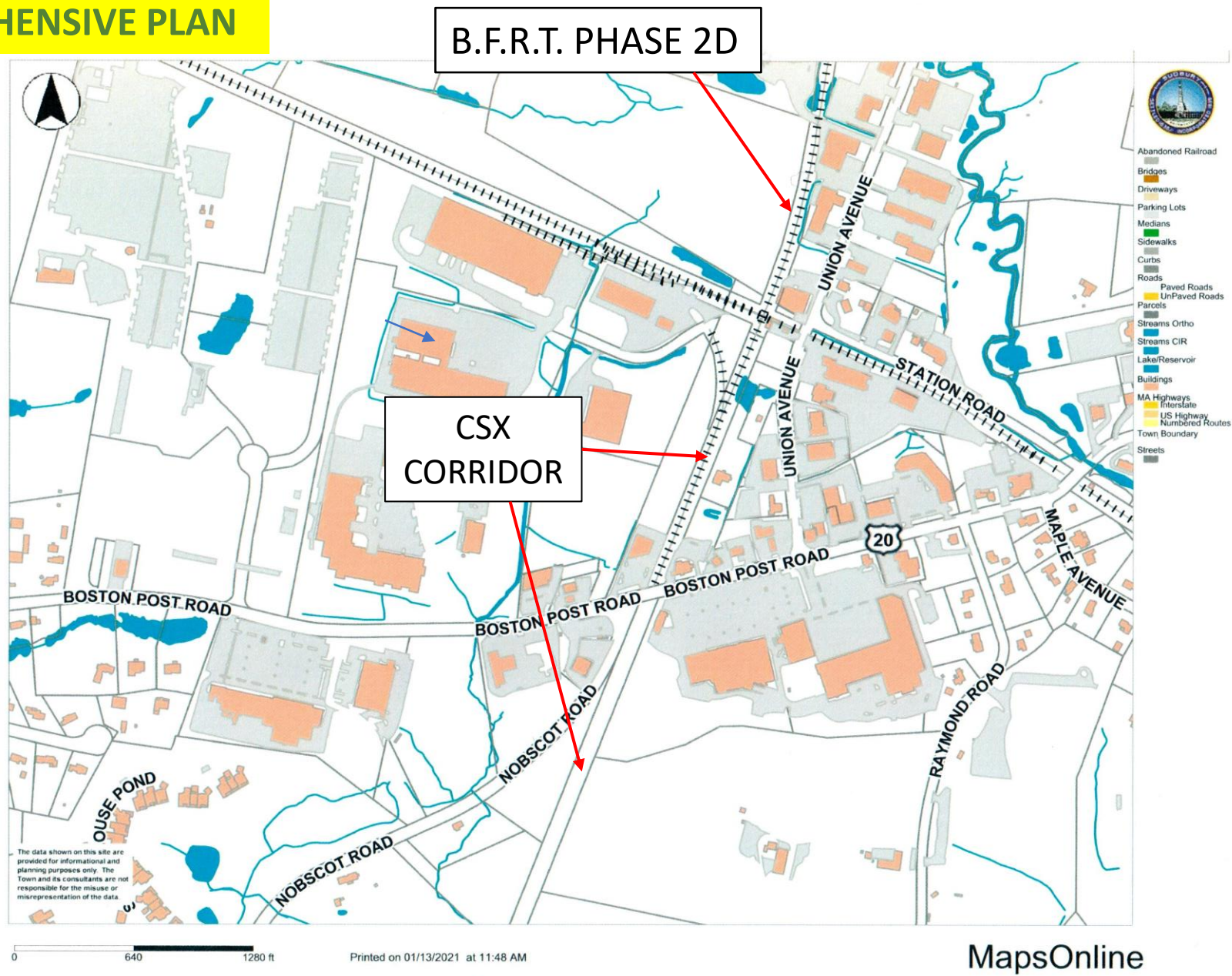
B.F.R.T. PHASE 2D



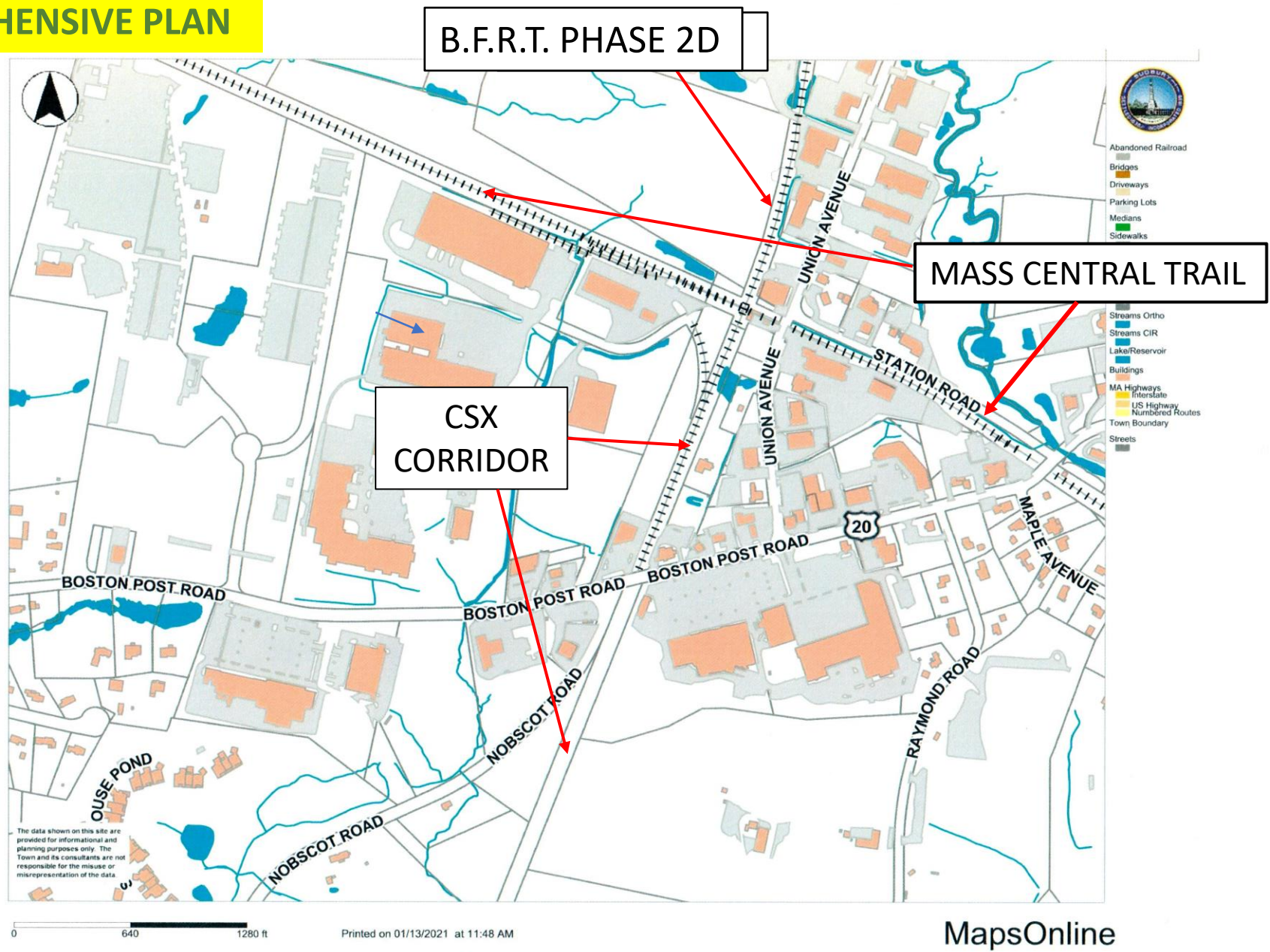
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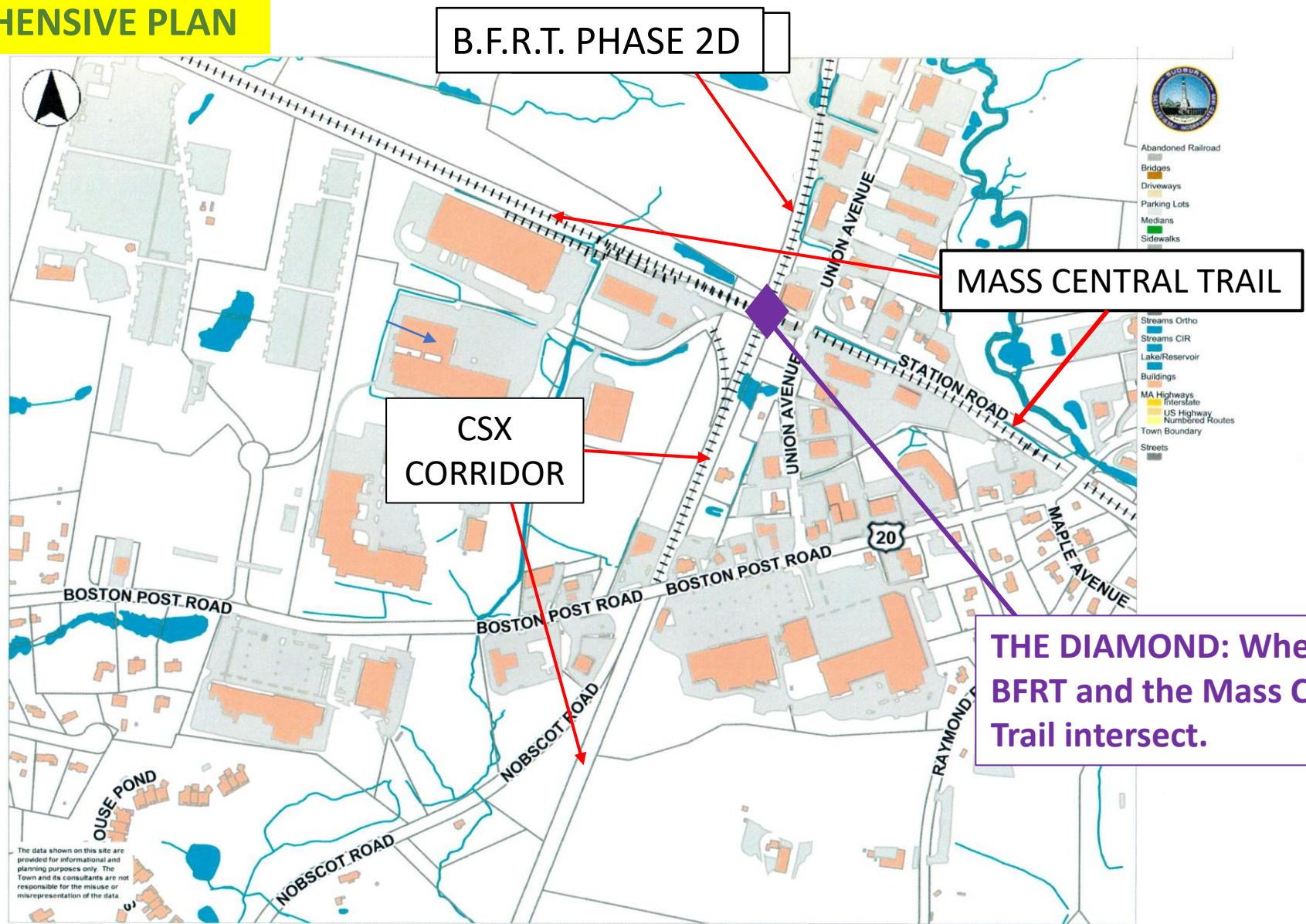
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AREA OF COMPREHENSIVE PLAN





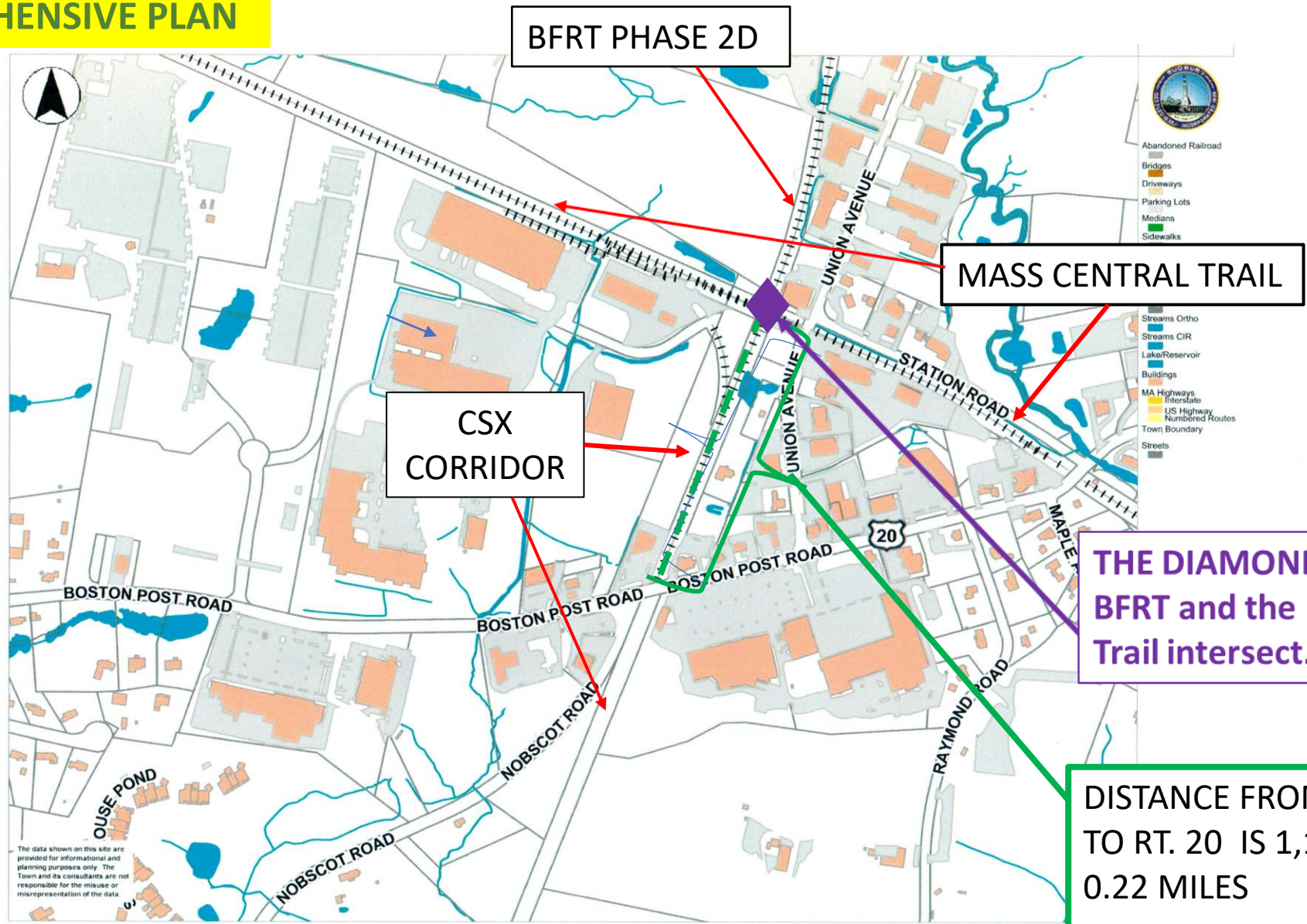
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THE DIAMOND: Where the BFRt and the Mass Central Rail Trail intersect.

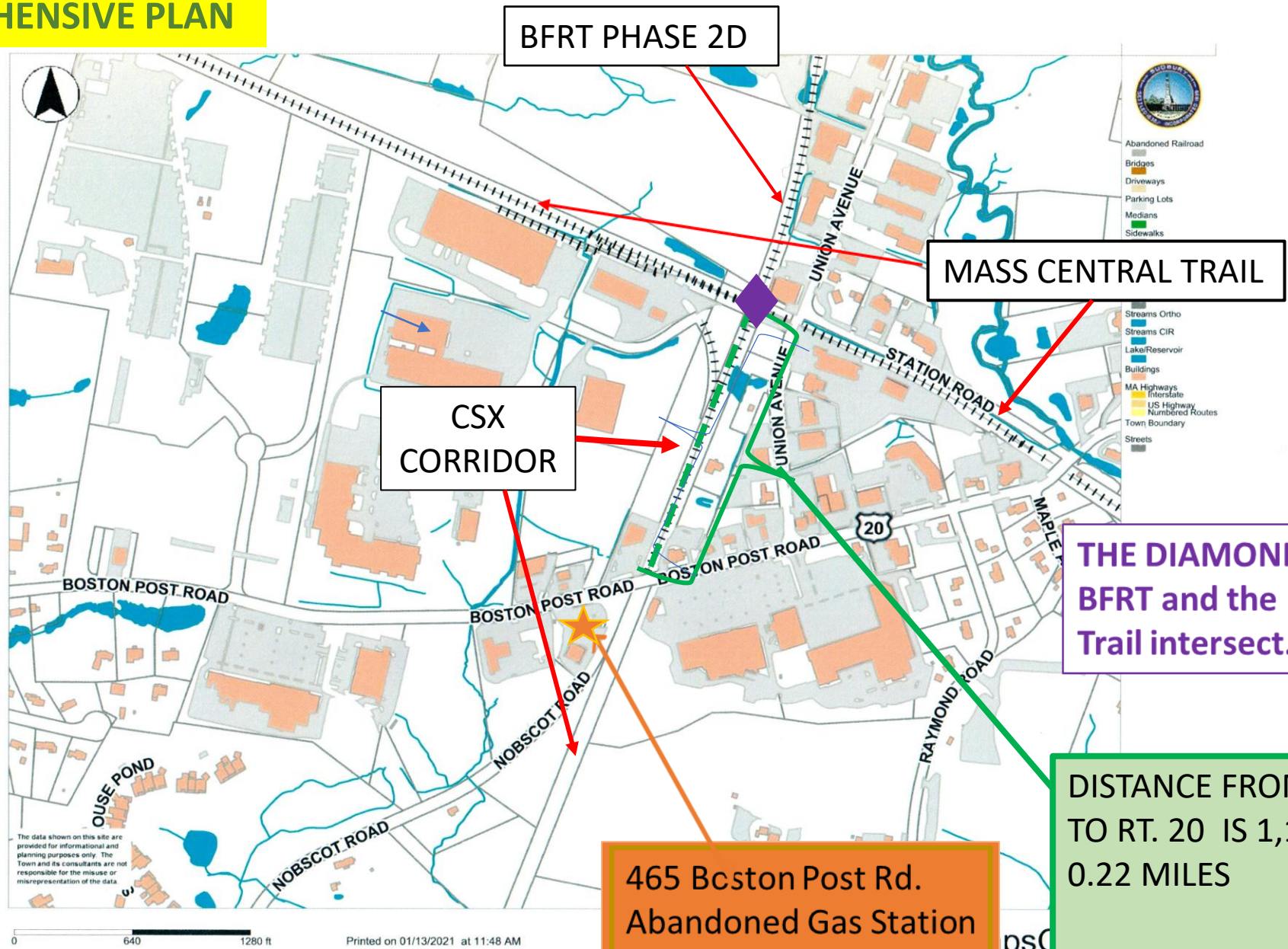
AREA OF COMPREHENSIVE PLAN



THE DIAMOND: Where the BFRT and the Mass Central Rail Trail intersect.

DISTANCE FROM THE DIAMOND TO RT. 20 IS 1,180 FEET, ABOUT 0.22 MILES

AREA OF COMPREHENSIVE PLAN



BFRT PHASE 2D

MASS CENTRAL TRAIL

CSX CORRIDOR

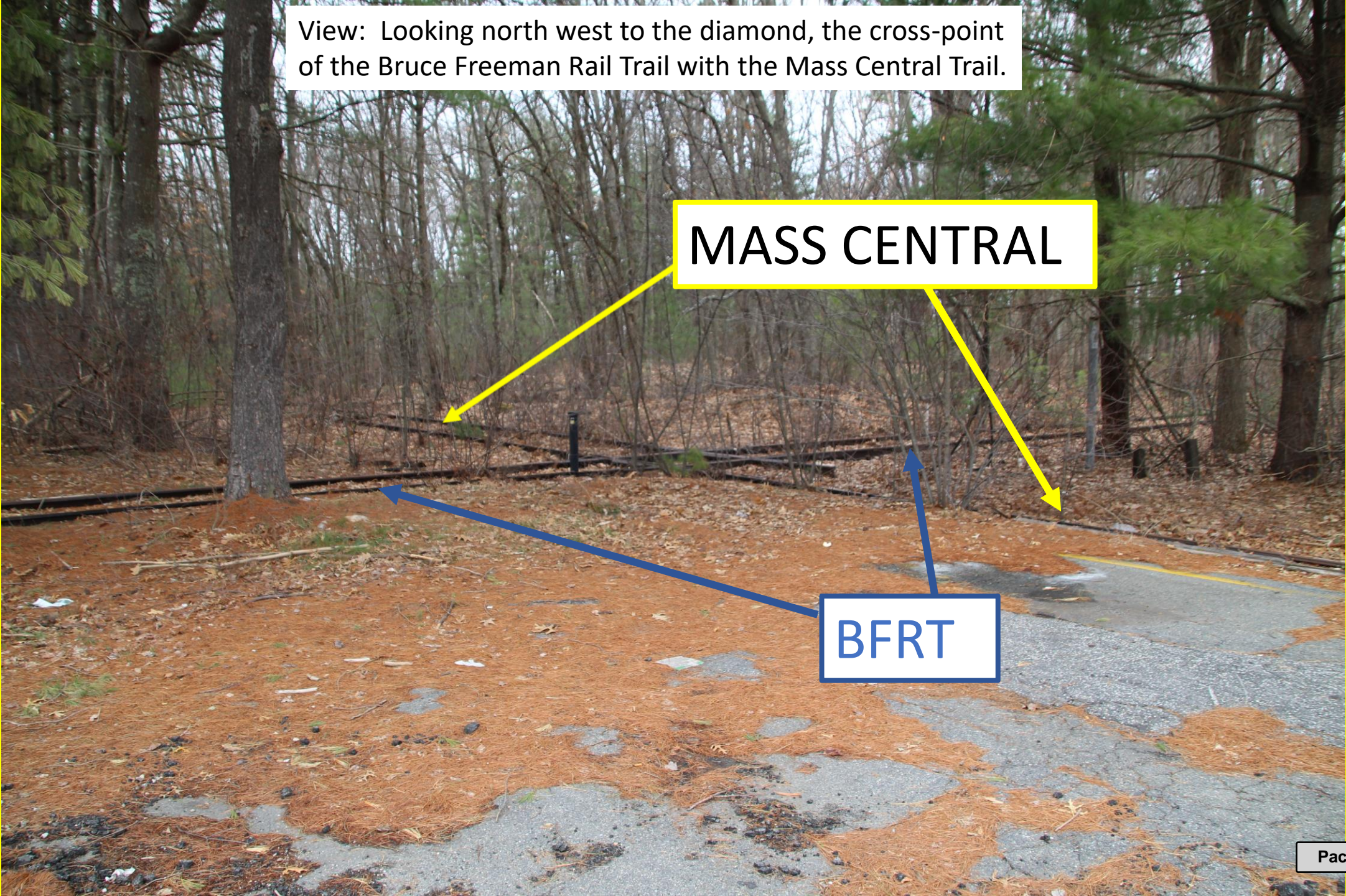
THE DIAMOND: Where the BFRT and the Mass Central Rail Trail intersect.

465 Boston Post Rd.
Abandoned Gas Station

DISTANCE FROM THE DIAMOND TO RT. 20 IS 1,180 FEET, ABOUT 0.22 MILES

The data shown on this site are provided for informational and planning purposes only. The Town and its consultants are not responsible for the misuse or misrepresentation of the data.

View: Looking north west to the diamond, the cross-point of the Bruce Freeman Rail Trail with the Mass Central Trail.



MASS CENTRAL

BFRT

View: Looking north along Bruce Freeman Rail Trail, at the diamond, the cross-point with the Mass Central Trail.



Mass Central Trail

BRUCE FREEMAN R. T. State Owned Section

BRUCE FREEMAN R. T. Town owned CSX Section

View: Looking south along Bruce Freeman Rail Trail, at the diamond, the cross-point with the Mass Central Trail.



Station Rd.

View: Looking east along the Mass Central Trail, at the diamond, the cross-point with the Bruce Freeman Rail Trail.



9.b

Looking west across Nobscot Rd. towards 465 Boston Post Road,
abandoned gas station

9.b



Looking north, across Rt. 20 to CSX rail corridor, to become part of BFRT



Looking north, across Rt. 20 to CSX rail corridor, to become part of BFRT



Looking north to CSX rail corridor,
to become part of BFRT



Looking south across Boston Post Road to
CSX rail corridor, to become part of BFRT

9.b



Looking south across Boston Post Road
towards gas station



Looking east on Boston Post Road
Abandoned gas station on right side







SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

10: Update from Sewataro subcommittee

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Update from Sewataro subcommittee - planning for Fall and progress toward Select Board goals

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Janie Dretler	Pending
Select Board	Pending

07/13/2021 6:00 PM

Town of Sudbury Sewataro Use Policy

v1.76 Updated 89 June-July 2021

1. Intent

It is the Town of Sudbury’s desire that all residents of Sudbury enjoy safe and appropriate use of Town property, including Sewataro. This use should take place with proper regard to accessibility for all residents, safety of participants, and with respect for the preservation of the property for future Town use. The intent of this document is to be consistent with the Management Contract between the Town and the camp Operator and with existing Town policies regarding Town facilities.

Commented [CR1]: Check to be sure this does not conflict with the Management Contract

2. Public Access Times

While Camp Sewataro is operating, public access of the grounds is allowed for recreational purposes only during designated times in order to avoid conflicts. These designated public access times are:

Camp Season Public Access (June 1 – August 31)

- Monday-Friday: 6pm-Dusk in the front section of the property
- Saturdays, Sundays and Federal holidays: 9am-Dusk in the front section of the property

Note: During camp season, public access is available only to the front section of the property to ensure the security of Town, Camp, and camper property.

“Off” season Public Access (September 1 – May 31)

- Monday-Sunday: 9am – Dusk

3. Permitting Authority

The permitting authority for the use of the Sewataro property shall be the Town Manager. Larger events involving food trucks, electrical equipment, or stage work may require additional inspections or approvals from the Town Manager, Health Department, Building Department, or other Town departments.

First-time reservations for exclusive use of property facilities (e.g., lodges and pavilions as listed below) by organized groups is not allowed without permission from the Town Manager or his/her delegate, which may be the Sewataro Community Liaison. Use of Sewataro is not allowed for for-profit, religious, or lobbying purposes without permission from the Town Manager or his/her delegate. In certain circumstances Town Manager may seek input from the Select Board in its role as policy-making body in Town. No applicant is guaranteed to receive permission.

((CQ WITH HENRY for input - what scale event requires TM and/or SB permission - e.g. is 500 people with a pavilion tent or a determination of scale?))

((CQ consider language guiding reasons for potential rejection of application))

Commented [CR2]: Want to maybe fine tune this sure it is consistent with Town-wide facilities. Not to exclude, just seeking to provide guidance for when Sewataro reps must check in with Town Manager.

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4. Facility Reservations

For organized events and meetings, specific spaces can be reserved during designated times.

The scheduling of reservations shall be the responsibility of the Camp Sewataro community liaison.

As of June-July 2021, contact Kristen Drummey, Camp Sewataro Community liaison, at kristen@sewataro.com with questions or to book. A calendar depicting Sewataro reservations is available here:

<https://sudbury.ma.us/townmanager/2021/03/15/segatara-resident-event-calendar/>

Reservations should be made at least **forty-eight (48) hours**, excluding Saturdays, Sundays and legal holidays, in advance prior to the event. In the event of extenuating circumstances, the 48-hour advance notice requirement may be waived by the Town Manager. Larger events involving food trucks, electrical equipment, or stage work may require additional inspections and several weeks' notice is recommended.

Written reservations must include:

- Name of the group requesting the reservation
- The primary contact person for the group, along with their phone number and email address
- **The information required might change based on whether or not a specific application form is required. The Schools have a facility use application form we could copy.**

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5. Group Reservation Responsibilities

A group's primary contact person is responsible for coordinating the event and shall be responsible for ensuring:

- That the space, facility, and/or general location used is kept in clean condition and proper order following the conclusion of the meeting, including removal of all garbage or waste materials, removal of all decorations, and return of any furniture or equipment to their original locations at the conclusion of the event.
- All restrictions are adhered to.
- **Completion of the Segatara Property Use Form in advance of the meeting. ((Bill/Charlie to get samples from similar facilities for how this might look. Form would include name, contact info, email, hours they wish to reserve, number of attendees, what the plan to do, any special equipment or accommodations they request, etc.))**

6. Reservation Priority

Reservations shall be made on a first-come, first-served basis. However, when in conflict, priority shall be given to local government organizations, then local residents, then local groups, and then non-Sudbury organizations or individuals.

There may be times when a site plan and additional equipment may be required, this coordination will begin with the reservation process. If additional toilets are needed to complement the event, at least one shall be in compliance with Americans with Disabilities Act (ADA) requirements.

7. Available spaces

The spaces available to reserve include:

Facility	Maximum Occupancy	Attributes	Notional Use Fee
Liberty Lodge	150	4000 sq. ft. Covered roof	???
Meeting Hall	50	1200 sq. ft. Covered Roof	???
Tree House	???	Covered roof	???
Craft Deck	???	Tented Roof (usually seasonally available in the summer)	???

Tennis Courts (two available)	???	???	???
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8. Fees

The Select Board shall set the amount of the fee so as to recover a reasonable approximation of the costs to the Town in processing the requested item, and to recoup reasonable maintenance and repair costs of the property ((and in certain cases generate revenue for the Town.)) --- ENSURE CLARITY AROUND WHERE FEE GOES, (e.g., into an enterprise fund or similar vs. general fund or other.

Commented [CR3]: Some debate around this co Will seek input from Henry on appropriateness of t
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(1) Facilities may be used without rental fee, provided there is no charge to the public either by admission fee or sales, by:

- a. Town, State or Federal departments.
- b. Non-profit organizations whose functions are charitable, civic, or patriotic.
- c. Community service groups, such as Scouts, youth recreational groups, etc.

(2) Facilities may be used with rental fee by:

- a. Any organization charging admission or conducting sales.

(Informational: \$40 per day at Town Hall currently, - check Weston, Nobscot Scouts)

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(3) Rental fee Schedule – per date (each day): Shall be in accordance with the Fee Schedule in Section 7.

Any revenue from fees charged for use of programming/meetings held at the Sewataro property during “public access hours” shall remain with the Town. Any revenues generated from Town-organized programming/meetings shall remain with the Town. ~~Non camp events organized by Camp Sewataro shall follow the revenue share agreement between the Town and Camp Sewataro, e.g., public swimming facilitated by camp operator, which will staff and collect fees~~

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Fees MUST be justified and reasonable, not arbitrarily established. How much is needed for general maintenance, recovery, cleaning, permit review, etc.

Rates and Fees:

- Sometimes raising/establishing rates results in less use

- Deficits need to drive rate increases

- Should we consider two categories: low fee group of more local-type organizations and a high fee group for, say, weddings or corporate outings. Capture this in a table. Possibly escalating amounts based on headcount (e.g. 0-50 attendees, 51-150 attendees, 151+ attendees??)

Commented [CR4]: I think this is all captured in “recoup” idea in the opening paragraph, and in the to be consistent with town-wide facilities.

	Non-resident Group	Resident Group	Private/Corporate Group
0-50	\$20	\$5	\$50
51-100	\$40	\$10	\$100
101+	\$60	\$20	\$150

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9. Insurance Requirements

Insurance requirements shall be in accordance with Town Park & Recreation Department policies (<https://sudbury.ma.us/recreation/wp->

[content/uploads/sites/335/2014/08/TownofSudburyFacilityusepolicyJune12012update.pdf](#)). Proof of insurance coverage may be required of any organized group requesting reservations at Sewataro and requested at any time. Groups and/or individuals that carry liability insurance should add the property to their policies and share a copy with the camp operator for file.

The Town or its representative shall request an event's group's primary contact person should obtain a special event policy listing the camp and the town as additional insured. In the event this special event policy cannot be obtained, a liability waiver or deposit will suffice.

This will be problematic in some cases, a liability waiver or deposit would-will suffice.

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Liability Waiver
Town of Sudbury.pc

10. Acceptable Use

Any use of the Sewataro property shall adhere to acceptable use guidelines as put forth by the Town Park & Recreation Department. Refreshments shall be allowed, but all garbage must be cleaned up and disposed of in appropriate receptacles.

11. Maximum Occupancy

Maximum Occupancy of each structure shall be in accordance with Town Fire Department regulations. Maximum occupancy is listed in the table above.

12. Restrictions

- All use of facilities is at your own risk
- Residents are required to "carry in and carry out" anything brought onto the property, including trash.
- Smoking or vaping is not permitted in Sewataro.
- Vehicles are prohibited from driving on interior roadway, walkways, and any grassed area without express permission.
- Parking is permitted only in the designated lower and upper parking lots.
- No alcoholic beverages are allowed at Sewataro without express permission from the licensing authority.
- Sledding: Sledding is at your own risk. It is recommended that any sledding be done on the hill towards the fields.
- No dogs or large pets allowed, leashed or otherwise.
- No ice skating on the ponds in the winter.
- No swimming in the ponds.
- Any fishing in the ponds should be catch-and-release. These fish should not be eaten.
- No open fires or grills without a special permit issued by the Select Board, with review by the Fire Department required.

13. Exclusive Use

Under no circumstances will exclusive use of the Sewataro property be granted to one group during the public access hours as described in Section 2.0 Public Access Hours.

14. Emergency Contact

In case of an emergency, user is to [call 911](#).

15. Postings

Any posting at the Sewataro property shall be consistent with the Town’s policy on Advertising and Directional Signs; no “signs of an advertising nature” on behalf of for-profit organizations shall be allowed. Public postings shall be allowed only at the informational kiosks located at the front and back entrances to Sewataro.

16. Restrooms

There are **two (2)** Port-a-Potties available, an ADA-accessible one located near Liberty Lodge and a general use one available near the lower parking lot, available for use as restrooms during public access times. **For events with 25 or more people, an additional fee of \$XYZ for servicing before and after the event will be incurred.**

For events with 100+ people, the user will be required to contract for its own port-a-pottie services.

[Check for consistency with Haskell regulations and/or summer concert series. #port-a-potties?](#)

17. Traffic Management

Should the event be large enough, the Police Department may require a police detail or other arrangements to appropriately direct traffic.

18. Parking Spaces

Parking is permitted only in the designated lower and upper parking lots. There are 10 parking spaces in the upper lot, with XYZ# ADA compliant handicapped accessible spaces, with 90 parking spaces in the lower lot, with XYZ# ADA compliant handicapped accessible spaces, and approximately 30 additional overflow parking spaces in the front field. Event organizers shall consider the number of required parking spaces when making reservations.

[Consider additional description around parking areas to help potential users navigate/choose parking lot location.](#)

19. Park and Recreation Coordination

Sewataro event organizers shall confer with the Park and Recreation and other Town departments as appropriate to ensure there are no [similar](#) events scheduled [for conflicting dates](#) (e.g., the two contract community events per year). In the event of a conflict, the Town-organized event shall take precedence.

20. Hold Harmless Individual User Agreements

On behalf of myself and/or my minor child, (User), I understand that part of the facility and experience involves activities and group interactions that may be new to us, and that they come with uncertainties beyond what we may be used to dealing with at home, including but not limited to uneven terrain, collisions, being struck by thrown objects, insects, wild and domestic animals, inclement weather, remote locations, communicable diseases including but not limited to COVID-19, and other risks, including use of the facility by members of the public. I am aware of these risks and are assuming them on behalf of me and my child. We realize that no environment is risk-free, and understand and, if applicable, have instructed my child on the importance of abiding by the facility’s rules, and we agree that we are familiar with these rules and will obey them.

To the fullest extent permissible by law, user agrees to save and hold harmless Camp Sewataro, LLC and the Town of Sudbury, including its owners, employees, trustees, agents or officers from and against any claim, suit, cause of action settlement or judgment brought against it by any party arising out of user’s breach of its duty of reasonable

Commented [CR5]: Maybe these two sections go into Sewataro Use Application?

care or intentional act arising out of user’s use of the property or facilities, including attorneys fees and other costs of suit, and further to waive any and all claims or causes of action against Camp Sewataro, LLC and the Town of Sudbury, except those that are the result of their gross negligence or intentional acts.

21. Hold Harmless Group User Agreements

User understands that part of the facility and experience involves activities and group interactions that may be new to our participants, and that they come with uncertainties beyond what our participants may be used to dealing with at home, including but not limited to uneven terrain, collisions, being struck by thrown objects, insects, domestic and wild animals, inclement weather, remote locations, communicable diseases including but not limited to COVID-19, and other risks, including use of the facility by members of the public. We are aware of these risks, and we are assuming them on behalf of our participants. We realize that no environment is risk-free, and so we have instructed our participants on the importance of abiding by the facility’s rules, and we agree that they are familiar with these rules and will obey them.

To the fullest extent permissible by law, user agrees to save and hold harmless Camp Sewataro, LLC and the Town of Sudbury, including its owners, employees, trustees, agents or officers from and against any claim, suit, cause of action settlement or judgment brought against it by any party arising out of user’s breach of its duty of reasonable care or intentional act arising out of user’s use of the property or facilities, including attorneys fees and other costs of suit, and further to waive any and all claims or causes of action against Camp Sewataro, LLC and the Town of Sudbury, except those that are the result of their gross negligence or intentional acts.

The undersigned represents that they are authorized to execute this agreement and to bind the group.

22. Accessibility

To the greatest extent practicable, organizers shall work with the Camp Operator and Town, as appropriate, to implement temporary adjustments that will offer access to the widest population use during the planned event. This may require coordination with the fire, building, and combined facilities departments. This may also include things like ADA compliant ramp use, potable restrooms, protective surface enhancements, or other appropriate considerations.

23. Reportable

It is imperative to report any additional service or logistical items required by an event. These include:

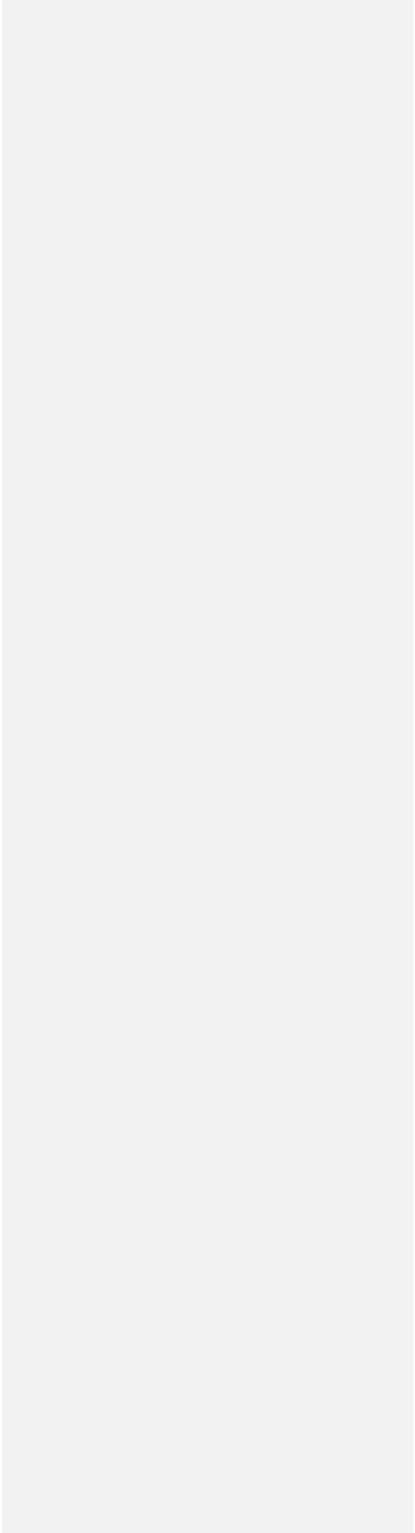
- Food
- Electricity
- Noise
- Stage

Commented [CR6]: More detail here from the town about items to report?

24. Open Flames, fire pits, cooking devices

~~Public use of any fire pit, grill or open flame, etc. on the property would require a special permit that was issued by the Select Board, with review by the Fire Department required. This increases liability to the Town and is not recommended on this or any Town property. We would have no control over these non-commercial cooking devices that could cause injury to the public. We do not allow any grilling on Parks. (Many times these small inexpensive grills are used and just left behind on the property for the Town to pick up.)~~

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Attachment 10.a: Sewataro Policy - use & fees Draft 07.08.2021_CGR_BJS (4633 : Update from Sewataro subcommittee)

From: Scott Brody <scott@kenwood-evergreen.com>
Date: June 28, 2021 at 11:28:02 AM EDT
To: "Schineller, Bill" <SchinellerB@sudbury.ma.us>
Cc: Kristen Drummey <kristen@sewataro.com>, Town Manager <TownManager@sudbury.ma.us>
Subject: Re: request for plan for providing public swimming at Sewataro

Hi Bill,

I do believe a September 30th deadline is achievable. We will have to explore a couple of options. The pools aren't large, but with the right investment in an automated chlorination system, we might be able to keep them operating through all or part of the weekends. The swimming pond is the better option, though keeping it in the right condition involves a bit of alchemy! :)

I'd like to set up a couple of meetings for early September so that I can get a clearer sense of the scope of access that will hit the sweet spot for the town. We need to keep camp clients happy and cash flowing through the town, while expanding access to all we can reasonably serve. We can figure that out together, and I can then construct an operational plan to make it happen. It might make sense to schedule a site visit for this summer...maybe in late July or early August...so that we can brainstorm and visualize options together. What do you think?

Scott

Scott Brody

Owner & Director
 Camps Kenwood & Evergreen



T: 781-793-0091
 E: scott@kenwood-evergreen.com
 winter: 239 Moose Hill St, Sharon, MA 02067
 summer: 114 Eagle Pond Rd, Wilmot NH 03287



On Mon, Jun 28, 2021 at 11:19 AM Schineller, Bill <SchinellerB@sudbury.ma.us> wrote:

Hi Scott,

Understood about camp season.

Can you provide a deadline by which you would deliver a plan?

Understood it can be after Aug 31, but we'd like a date certain by which we will see a plan in writing, at which point we can discuss in the Fall.

What does seem time critical to me, is that during the course of this camp season, as you maintain water quality etc for the Monday-Friday campers, that you work out the feasibility of having clean, safe for swimming

water at other non-camp hours. Also, consider how Sewataro staff scheduling could schedule lifeguards for non-camp days. Perhaps this is something you can discuss with staff in 2021, to be ready for 2022.

To eliminate uncertainties this summer, so that whatever plan you deliver for public swimming later will be feasible, not an experiment on the fly.

The Town's 'budget season' kicks into gear into September, at which point the Town allocates funds for FY2023 (July 11, 2022 - June 30, 2023). The budget starting June 30, 2022 gets locked down by December 2021, even though it doesn't get voted on until May 2022.

Similarly, Sewataro Assessment and Recommendations subcommittee will need to deliver findings to the full Select Board in the Fall, to inform decisions about the renewal of Operator Agreement by June 30, 2022.

Our ask is not a 'drop everything and do this now', but rather to give sufficient advance notice of our request so that you have time to gather data as you manage a more 'normal' summer of the Monday-Friday day camp.

Hopefully that makes sense?

Would a deadline for delivering a written plan by September 30 be achievable?

Have a great summer!

-Bill

On Jun 28, 2021, at 10:46 AM, Scott Brody <scott@kenwood-evergreen.com> wrote:

Hi Bill,

It is opening day at Sewataro and at Everwood, and my overnight camp just opened on Saturday. I am eager to work with you and Charlie on this, but it might be more realistic to circle back at the end of the camp season. Is there a time factor that is critical that I'm not aware of? Could we work on this together after August 31st? You know we are committed to a strong and sustainable relationship with the Town of Sudbury and will work with you to develop a plan that meets everyone's needs.

With warm regards,

Scott

Scott Brody

Owner & Director

Camps Kenwood & Evergreen



T: 781-793-0091

E: scott@kenwood-evergreen.com

winter: 239 Moose Hill St, Sharon, MA 02067

summer: 114 Eagle Pond Rd, Wilmot NH 03287



On Thu, Jun 24, 2021 at 9:42 AM Schineller, Bill <SchinellerB@sudbury.ma.us> wrote:

Hi Scott,

Hope summer is off to a great start!

I'm writing you as a member of the Select Board's 'Sewataro Assessment and Recommendations Subcommittee' (composed of myself and fellow Select Board member Charlie Russo). For Open Meeting Law reasons, Charlie is left off this thread; he and I agreed in our last public meeting that I would contact you.

Swimming facilities at Sewataro are one of the unique aspects of this Town property.

Based on resident interest, we are requesting a plan for providing public swimming at Sewataro, facilitated by Sewataro. This will help inform our subcommittee's assessment and recommendations to the Board, in advance of decisions concerning extension of the Term of the camp operator and property management contract.

A plan for facilitating public swimming could fall within provision 1.2.6 Programmatic Activities of the contract, which provides flexibility for planning by the property Manager, and the allocation of cost by mutual agreement of the parties.

Our request is for a plan facilitated by the Operator/Property Management company, minimizing Town / Parks and Recreation Department staffing requirements. (We are also pursuing a different option with more Parks and Recreation Department involvement.)

We ask that your plan include such details as:

- days / hours for public swimming
- estimated number of swimmers / public on site
- estimated staffing requirements
- estimated cost of staffing

- approach for Sewataro to hire / schedule necessary staff
- approach for adequate parking
- approach for adequate bathroom facilities
- approach for sanitization / health and safety
- approach for accessibility
- approach for issuing / checking swim passes (resident and optionally non-resident)

We are not asking you to suggest fees, but rather to focus on costs. However, should we desire to collect fees to defray costs, control occupancy, we request you propose how Sewataro could manage the fee collection, pass issuing process.

For reference on offerings in nearby towns, please look at how Acton Nara Beach and Wayland Town Beach operate.

<https://www.acton-ma.gov/312/NARA-Park>

<https://www.wayland.ma.us/beach>

Regarding accessibility, please be aware of Sudbury's recent ADA Self-Evaluation and Transition Plan, developed with the assistance of IHCD (Institute for Human Centered Design).

<https://sudbury.ma.us/townmanager/2021/04/09/ada-evaluation-and-transition-plan/>

Document 'Camp Sewataro - Grounds 012221' <https://sudbury.ma.us/townmanager/wp-content/uploads/sites/357/2021/02/Camp-Sewataro-Grounds-012221.pdf?version=cf5b628e23f1e9bc4ae10f9d27adcba4> addresses how the Town may fulfill its obligations under the Americans with Disability Act (ADA).

Please let us know roughly when you could deliver a draft plan. We would hope to be able to review such a plan this Fall to inform our subcommittee's assessment and recommendations to the Select Board.

You may recall our recent conversation as well as my communication to you in June 2020:

Thinking ahead though, I suggest paying close attention to how water treatment can be scheduled such that there will be periods of time on weekends and holidays in 2021 when the public can safely swim without compromising the day camp. I'd encourage you to consult with how this is done elsewhere. Seems a solvable problem.

Public swimming at Sewataro would represent a great benefit to the community. We thank you for your consideration and partnership.

Sincerely,

Bill Schineller, Member Sudbury Select Board & Sewataro Assessment and Recommendations Subcommittee



Sudbury Public Schools Application for Building Use

Facility Request Information: Note that all approved use will be limited to days and locations indicated. Start and end times should reflect the time in the space not necessarily the event hours. Custodial charges may be applied for set-up and clean-up. Organizations must name a designated contact person in the event of emergency cancellations.

Date of Application: _____

Organization name: _____ Address: _____
 Designated contact person: _____ Email: _____
 Phone: _____
 Official in charge: _____ Email: _____
 (during event) Phone: _____
 Bill to: _____ Address: _____
 Email: _____

Building Use Category – Check Box that Applies

- Category 1 (school groups)
 - PTO
 - SEPAC
 - SEA
 - Town Boards/Committees
 - School Sponsored Clubs
- Category 2 (non-school groups)

- Gym
- Cafeteria
- Kitchen
- Auditorium
- Classroom
- Library

Equipment needed: _____
(Additional charges may apply)

Day of Week	Start Date (mm/dd/yyyy)	End Date (mm/dd/yyyy)	Start Time	End Time	Description of Activity

Estimated Attendance: _____

Admission will be charged: Yes No
 Contributions will be received: Yes No
 Certification of Insurance attached: Yes No
 Police will be necessary: Yes No

Applicant Agreement: I have reviewed the policies and regulations in the School Committee Policy Manual KF Use of School Facilities and accept full responsibility for the compliance with the building use requirements including all rules, care and protections of the property, and responsibility for behavior and discipline of persons present in connection with permit. I understand this is only an application and not automatically approved and I will be contacted with final Building Use charges and formal approval.

Applicant Signature: _____ Date: _____

For Office Use Only:

Date Received: _____ Available: ___ Yes ___ No

Proof of Insurance: ___ Yes ___ No Principal Approval: _____ Date: _____

Rental Fee: _____ Custodian Fee: _____ Cafeteria Staff Fee: _____ Additional Equipment Fee: _____

Fee Total: _____ Special Instructions: _____

Attachment 10.c: SPS Building Use Request (4633 : Update from Sewataro subcommittee)

**Sudbury Public Schools
Building Use Fee Schedule**

Building Use Fees		
	Category 1 School Groups	Category 2 Non-School Groups
Gym	\$0	\$50/hour
Cafeteria	\$0	\$50/hour
Kitchen	\$0	\$50/hour
Auditorium	\$0	\$100/hour
Classroom – Elementary	\$0	\$30/hour
Library – Elementary	\$0	\$30/hour
Classroom – Curtis	\$0	\$50/hour
Library - Curtis	\$0	\$50/hour
Additional Fees		
Custodian (3 hour minimum)	\$43/hour	\$43/hour
Kitchen Staff	\$50/hour	\$50/hour
Additional Equipment	TBD	TBD

Town of Sudbury Recreation Facility Use Policy

Update 6/1/12

This policy applies to all Town of Sudbury and school fields K-8 (*after school hours*), athletic fields and Fairbank Community Center located in the Town of Sudbury, Massachusetts when scheduled by the Park & Recreation Department. All guidelines included in this policy must be met or the Park and Recreation Department has the right to revoke use of requested facility by applicants.

The Park and Recreation Department will make every reasonable effort to treat all organizations, teams, and individuals using Recreation Facilities in a fair and equitable manner when establishing priorities for use. Further, all players, coaches, and spectators are expected to abide by generally accepted standards of good sportsmanship, standards set forth by the Youth groups and Sudbury Public Schools core values. User groups must allocate facility usage so as not to discriminate on the basis of disability, gender, race or religion.

Applications

The first step to securing a facility is to complete a Facility Use Application form.

Submitting applications:

1. The Park and Recreation Department is open Monday – Friday 8:30am – 4:00pm.
2. Applications will be accepted online, in person or via mail with check, payable to the Town of Sudbury, 40 Fairbank Road, Sudbury, MA 01776.
3. Telephone reservations will not be accepted, however, you may call (978) 443-1092 x 3259 to check field or gym availability, or email mcshean@sudbury.ma.us.
4. All applicants must be at least 18 years of age or older and must be present throughout the entire use of the rental period.
5. Once your reservation request has been submitted – **full rental fees** and proof of insurance are due within 5 business days of submittal.
6. No events may begin before 8:00am or past dusk, with the exception of lighted fields that may be scheduled up to 10:00pm. The time stated on your application should be the actual time you wish to gain entry to the field/facility and the time you anticipate being cleaned-up and off the field.
7. Field permits may not be “sublet” to any other group than the one stated on the permit.
8. There is no grilling of any kind allowed on any of our fields or facilities.

Applications are not confirmed until the applicant receives the field use permit. A separate application and application fees must be submitted for each park. Multiple fields at the same park will be considered one reservation form.

User Priority

Reservations will be accepted on a first come first serve basis and will be considered for all reservations according to the following priority:

1. *(Park & Recreation, School Department K-8, LSHS)*. NO CHARGE FOR USE OF FIELDS, however proper paper work must still be filled out.
2. *(Sudbury Youth Group and Sudbury Adult Sports Organizations)*. Town sponsored youth and adult groups are: Sudbury Youth Soccer, Youth Softball, SYLL (youth baseball), Youth Football, Boys Lacrosse, Girls Lacrosse, men’s softball and women’s softball and affiliated organizations etc.....**(see fee and charges sheet)**.
3. *(Other organizations)*. Sudbury based businesses, select teams, club teams, private clinics, tournaments, camps, adult or youth groups not sponsored by Town, private schools, non-residents, unaffiliated organizations, and other organizations. **(see fee and charges sheet)**.

When to Apply

<u>Field Use:</u>		<u>Application Submitting Start Dates</u>
Spring Season	April 1 st (TBA) – June 30 th	February 1st
Summer Season	July 1 st – August 31 st	May 1st
Fall Season	September 1 st – November 30 th (TBA)	July 1st
 <u>Gym Use:</u>		
Winter Season	November 1 st – March 30 th	October 1st
Spring Season	March 30 th – May 30 th	February 1st
Summer Season	June 1 st – August 20 th	May 1st
Fall Season	September 1 st – November 1 st	August 1st

FEES & CHARGES

All fees and charges are based on operational and administrative costs, preparation and set-up time, staff time, custodial clean-up, field maintenance (both preventative and repair), capital projects, and equipment replacement costs. The fees are established by the Town of Sudbury Park and Recreation Commission and are reviewed on an annual basis. The fees and charges set forth here are not negotiable and include all fields in Town including school K-8 and LSRHS fields. Town staff do not have the authority to waive or reduce fees. All charges are subject to a 1-hour time minimum.

- K-8 Public Schools/ LSRHS/ Town Recreation Programs – No Charge.
- Light fees will be billed to each user at the end of each season, at a rate of \$50 per hour per field over and above the normal permit fee based on usage. (Featherland Softball, Feeley Baseball). Priority II, III.
- Youth organizations \$35.00 per child/sport/season/program/in or out of season program.
- Adult organizations, will be charged \$30.00 per person per field per season for residents, and \$60 per person per field for non-residents. (Schedules must be provided and rosters with names and addresses).
- Select teams/clubs teams/outdoor camps/clinics half or full day will be charged \$35.00 per child/sport/season/program/off season clinic. (Roster numbers must be submitted at time of payment.) (Camps must provide operational permit from the Board of Health).
- Single day or weekend events (i.e. tournaments, jamborees, multi-town events) that are outside the scope of the seasonal permit: \$5.00 per participant.
- Gym Rental \$30.00 per hour (1 hour minimum).
- Tennis court rental \$10.00 per court per hour.
- Basketball court rental \$5.00 per court per hour.
- Sand Volleyball court rental \$5.00 per court per hour.
- Cutting turf field rental \$50.00 per hour and residents of Sudbury, \$75 per hour for non-residents of Sudbury.
- One time usage of a field will be \$50 per hour per field for residents, \$100 per hour per field for non-residents.

Cancellations/Refunds

The Town of Sudbury Park and Recreation Department does not give credits for fields that cannot be used due to weather or natural conditions. If an event is cancelled every effort will be made to reschedule the event at a later date for the affected group. Refunds will only be given in the event that a request is made in writing at least two weeks in advance of the event, and/or at the discretion of the Park and Recreation Department.

Liability/Insurance

1. Liability insurance holding the Town of Sudbury harmless is required for all long term reservations and tournaments. All policies must name the Town of Sudbury and Lincoln-Sudbury School Department as additionally insured.
2. The applicants will be responsible for any and all damage to the Town of Sudbury premises, equipment, and property. If after an activity, additional janitorial maintenance is required (in excess of normal cleaning services/time), the applicant will be charged accordingly.
3. The applicant will be held responsible for all actions, behaviors, and damages caused by his/her guests/attendees.
4. The Park and Recreation Department has the right to revoke any permit(s) issued due to the group causing damage to the field or gym by inappropriate behavior or activities caused by the group's use of the field or gym.

Security

The Park and Recreation Department reserves the right to require a police detail at any event. The permit holder should arrange for the police detail with the Sudbury Police Department. The police officer must be on duty 1 hour prior to and 1 hour after the rental period. Please make arrangements with the police department at least 60 days prior to an event. Permits will not be issued until the officers are reserved.

Restrooms

Some parks do not have restrooms available. If you are renting a field at one of those parks, you may need to rent portable toilet facilities. The Park and Recreation Department will make those arrangements for you. Restroom reservations must be made a minimum of twenty (20) business days prior to the desired date of use. Additional fees will be charged accordingly to the permit holder.

Field Lining and Maintenance

Field lining is a very important part of the permitting process. Please contact the Park and Recreation Department to go over field lining schemes for seasonal permits. We will not line fields for short term permits. The Park Department may ask a user group to move or alter practices due to field lining and mowing.

Rainy Days/Wet Fields

All sport fields in the Town of Sudbury are closed to use by anyone during the months of late November – beginning of April. To prevent damage and for safety reasons, the fields are not to be used in rain or wet conditions. Please do not allow your participants to play in any unsafe conditions and report such conditions (if necessary) to the Park and Recreation office (978) 443-3213 ext. 3259 or to the Parks Department at (978) 443-3213.

Guidelines for cancellation of activity on Town/School fields:

1. If a footprint leaves an impression on the turf or if the grass is removed easily with a cleat, this is considered a wet field.
2. Standing puddles of water on a field.
3. Footing is unsure and slippery.
4. Ground is water logged and squishy.
5. Lightening or thunder is present or severe weather warnings are present.
6. Unsafe facility conditions – glass, exposed stones and rocks, etc.
7. Frozen fields.

***Any teams caught playing on the field may forfeit the right to play on that field for the remainder of the season. Please call the Park and Recreation Department to report any field abuse or issues (978) 443-1092 ext. 3259.**

Field Open – Youth Group Field Coordinators Responsibilities

Although fields may be open for play as of Friday, noon, weather and field conditions may deteriorate by game time, in these situations, it is the responsibility of the field use coordinator to determine whether or not to resume play.

Closed or restricted areas:

A closed field area is at the discretion of the Director of Park and Recreation, Parks Department or the Director's designee. Any section or part of any park, facility or field may be declared closed to the public at any time for any interval of time, either temporarily or at regularly scheduled maintenance intervals.

If there is any question as to whether or not a field can be played on, you should call the Park and Recreation office at 978-639-3234. (Weather hotline – special announcements) or check with your individual youth group hotline. Change in status due to changing weather conditions will be put on the message by 1:00pm for daily evening play and by 8:00pm for weekend play. The hotline will be updated as conditions change. Knowledge of a group playing on and

damaging turf may result in the immediate cancellation of that permit and/or fines imposed to repair such damage. Please call the Park and Recreation Office at 9780-443-1092 ext. 3259 to report immediately. **Refunds will not be issued for inclement weather but every effort will be made to reschedule the event.**

General Rules and Regulations

The Town of Sudbury and Director of Parks and Recreation or an authorized representative retains the right to set conditions and requirements suitable to safe, reasonable, and orderly use of the parks and gym. Violation of rules and regulations may result in the facility use permit being revoked.

1. Any person (s) violating the established Rules and Regulations or constituting a public nuisance may be required to leave the premises.
2. Permit holders are only to use those fields or gym specifically designated on the permit. There may be another group following yours, so it is essential that the field is vacated by the scheduled ending time.
3. Gambling on Town property is prohibited.
4. The reservation is for field/gym use only. Field/gym permits are issued "AS IS": bases, goals, balls and other equipment are not included in the permit.
5. Vehicles may not be driven or parked on turf areas, sidewalks, service driveways, or emergency zones.
6. All trash must be placed in proper receptacles.
7. No food or drink in gym or turf field facilities.
8. Sneakers must be worn in the gym.
9. There is no alcohol or tobacco consumption allowed on Town owned property.
10. The Town of Sudbury carries no medical insurance for users of its facilities. Users participate at their own risk of injury.
11. There is no subletting of any field or facility in the Town of Sudbury. Permit holder must be present on site during the field or facility usage.
12. Full responsibility and financial liability for any property damage will be assumed by the user group.
13. There is no grilling (either gas or charcoal) allowed at all field/facility in town.

Use of Fairbank Community Center:

1. For youth group functions at Fairbank Community Center a minimum of one adult supervisor per each room is required. One adult will also be required to supervise the use of the bathroom area/facility.
2. The person signing the permit application is responsible for restoring the order and cleanliness of the gym, rooms, and bathrooms including the removal of all decorations, trash, litter, the setting up and taking down of chairs and tables, and the clean up of any spills.
3. Upon leaving the FCC Building users should make sure that all lights have been turned off, windows and doors locked, and heat/air conditioning properly set. All patrons must enter and exit through the pool front entrance for safety concerns for both the patrons and our staff.

Reservation Mandatory: Organized athletic activities on Town and School property are permitted only on a reservation basis. Organized play must have a permit on file with the Park and Recreation Department all others will be asked to leave location at once. Please call the Park and Recreation Office 978-443-1092 ext. 3259 to report immediately.

Scholastic Priorities: On School fields, priority will be given at all times to school-sponsored programs. Permits issued for use of school facilities will be cancelled or rescheduled on alternative spaces, when school programs are scheduled for those areas.



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

11: Discussion on outreach to ADL

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Discussion on Select Board outreach to Anti-Defamation League (ADL) regarding acts of antisemitism and next steps.

Recommendations/Suggested Motion/Vote: Discussion on Select Board outreach to Anti-Defamation League (ADL) regarding acts of antisemitism and next steps.

Background Information:
attached documents

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

From: Shukur, Peggy <pshukur@adl.org>
Sent: Friday, July 2, 2021 11:04 AM
To: Roberts, Jennifer
Subject: Re: Request to ADL

Hi Jennifer,

I am glad we had an opportunity to speak about Sudbury's initiatives to address antisemitism and bias in the community. As we discussed, these are not issues limited to the school or a particular community. Also, notifying local clergy and other key community stakeholders (depending on the type of incident and communities most directly affected) early when an incident occurs either in the school or community is important to building trust with the community and enlisting them as partners in the response. Finally, although we talked about antisemitism in particular, there may also be an opportunity to apply some of these resources when responding to other hate or bias incidents.

Each incident is unique so please treat these as guidelines. We at ADL are always available to talk through responses on a case by case basis.

What follows are a number of resources, starting with the need to report incidents when they occur. All can be shared widely with the community.

- [Antiracism and Antisemitism Resources from JFS](#) - Not ADL materials but many useful items from Jewish Family Services of MetroWest.
- [How to Report an Incident of Antisemitism or Hate](#). This explains why and how to report.
- [Online Incident Reporting to ADL](#). This is the online form to report to ADL.
- [ADL Guide to Responding to Incidents of Bias in Schools](#) This guide, while focused on school-based incidents, has excellent content on the history and derivations of many hateful symbols and how to create learning experiences in the wake of an incident. There is also good guidance on communications following an incident.

We have a number of school-based anti-bias initiatives that our Education staff recommends be considered for implementation in the community's schools and for educators:

1. **Professional Development:** ADL offers anti-bias professional development training and could provide a program for development training for the two district's administrative leadership teams (superintendents, building principals, asst. principals, etc.)--with the teams from both districts coming together. Our Education team would conduct a needs assessment in advance to identify and prioritize the areas of focus, such as bias incident prevention and response strategies.
2. **No Place for Hate (NPFH):** No Place for Hate (NPFH) provides PreK – 12 schools with a framework to organize school-wide initiatives that build safe, inclusive and equitable communities; empower staff, students and their families to take a stand against all forms of hate; and communicate a clear, unified message that all students have a place where they belong. **There is no fee for districts and their schools to participate.** A detailed guide to NPFH is attached.

To qualify as No Place for Hate, each participating school is required to establish a committee that involves students in the planning and implementation of three school-wide activities which 1) address bias-related topics and issues that pertain to the school; 2) engage all students in active learning and discussion; and 3) promote inclusion, equity and community building. Members of a participating school also sign No Place for Hate's pledge to affirm their shared commitment to address all forms of bias and prejudice, actively promote inclusion and equity, and support individuals and groups that are targeted

with hate. (Due to the pandemic, this year schools are required to sponsor only one virtual school-wide activity).

Below please find the registration link and information on the No Place for Hate implementation process.

1. **Schools register for NPFH at the link [here](#).** Once registered, ADL will send schools a Google folder to track their work throughout the year.
 2. **Form a Committee.** Each registered school selects a coalition of students, at least two faculty and staff members, administrators and family members to lead its No Place for Hate efforts throughout the year to promote respect, equity and inclusion for all. Once committee members have been identified, schools register them [here](#).
 3. **Sign the NPFH Pledge.** All students and staff sign the No Place for Hate Pledge as proof of their commitment to doing their part to make their schools No Place for Hate. The signing can be done virtually or through individual classroom projects. Copies can be sent home to parents and family members with an explanation of the initiative and an invitation for families to sign the copies as well!
 4. **Schools submit an activity proposal for three school-wide activities.** The proposal should be designed to enhance students' understanding of diversity, bias, social justice and inclusion.
 5. **Implement the activities.** Once the proposed activities have been approved by ADL, they can be launched!
 6. **Submit the paperwork.** At the end of the year, schools submit all the required paperwork (e.g., activity forms, pledge signatures, lesson plans, photos, videos, etc.) as proof of completion. Schools will then be certified "NO PLACE FOR HATE!"
3. **Community gatherings; Learning:** The Belmont Select Board held a very impactful community gathering during a Select Board meeting following a racially motivated incident in the spring. Several task forces grew out of that. You may want to contact Belmont to hear from them what worked and how they have kept the initial efforts focused and productive. Separately, ADL staff can provide learning opportunities for the community (including law enforcement) or students on how to recognize hate symbols, on antisemitism, or hate crimes in general. These sessions are often more engaging when we present as part of a panel with others in the community, but we are open to discussing what best suits the Sudbury community.
 4. **Other ADL Educational Resources:** Also attached is a summary of various ADL Education offerings, from Holocaust and genocide education to our A World of Difference Peer Leadership program. I am specifically calling out a new online course on antisemitism called [Binah](#). *BINAH: Building Insights to Navigate Antisemitism & Hate* is a digital course that motivates students to identify as global citizens with respect for all people, regardless of the makeup of their school community. It can be taught in conjunction with teaching about the Holocaust, or as an independent lesson. Topics include the impact of antisemitic attacks on American society as a whole, the vast diversity of modern Jewish life, and how to be a strong ally.

Let me know if you have any questions. Happy to continue to work with you and the Board on this important initiative.

Peggy

Thank you for taking the time to speak with me today. I found the conversation immensely valuable, and I look forward to the resources you are able to share (at your convenience).

Best regards,

Jennifer Roberts
Chair, Sudbury Select Board

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Attachment11.a: ADL email (4701 : Discussion on outreach to ADL)

ADL Education Offerings:

Educational Programs and Trainings:

ADL's Education Department provides educational programs, training and resources for grades PreK-12 and college/university settings. Our anti-bias and bullying prevention programs assist educators and students in understanding and challenging bias and building ally behaviors. Our work in confronting anti-Semitism empowers young people with constructive responses to combat anti-Semitism. We also have programs and resources to help students explore and critically reflect on the lessons of the Holocaust.

A World of Difference® Institute Peer Training Program

ADL's Peer Training Program for middle and high school students, which was featured in an NPR "All Things Considered" segment, "[Fighting Hate in Schools,](#)" provides a diverse group of 25 – 30 students who represent their school's demographics with anti-bias training to lead developmentally appropriate activities and discussions with their peers on explicit and implicit bias pertaining to race, ethnicity, national origin, religion, culture, ability and other aspects of human diversity. Participants also develop safe and practical prevention and response strategies to address prejudicial behaviors, including the ways in which young people can become allies for peers who are targeted.

As a leading provider of anti-bias education, the ADL's A World of Difference® Institute recognizes that attitudes and beliefs affect actions, and that each of us can have an impact on others, and ultimately, on the world in which we live.

ADL New England runs this program in 120 schools in New England.

No Place for Hate

ADL's No Place for Hate initiative is a school climate improvement framework that provides PreK-12 schools with an organizing framework for combating bias, bullying and hatred, leading to long-term solutions for creating and maintaining a positive climate.

No Place for Hate schools receive their designation by:

- Building inclusive and safe communities in which respect is the goal, and all students can thrive.
- Empowering students, faculty, administration, and family members to take a stand against hate and bullying by incorporating new and existing programs under one powerful message.
- Sending a clear, unified message that all students have a place to belong.

ADL New England relaunched this program in 2020 and is currently working with 15 schools.

Words to Action

Words to Action: Empowering Students to Address Anti-Semitism is an interactive education program for middle, high school and college students designed to empower and equip them with constructive and effective responses to combat anti-Semitism and anti-Israel bias, including:

- Stereotypes and prejudice
- Vandalism

- Harassment
- Hate speech
- Anti-Israel incidents

BINAH: A New ADL Online Course on Antisemitism and Hate

The latest in ADL Education’s antisemitism programs, BINAH – Building Insights to Navigate Antisemitism and Hate – is a digital, interactive course for high school students that helps build empathy and allyship.

BINAH, Building Insights to Navigate Antisemitism and Hate, is a digital course developed by ADL in partnership with Everfi, that motivates students to identify as global citizens with respect for all people, regardless of the makeup of their school community.

Students learn through short real-word stories, helping them engage in topics like the Holocaust, the lives of Hasidic Jews, immigration and antisemitic acts in America. These personal stories help students build empathy, perspective and allyship.

Echoes & Reflections

Echoes & Reflections empowers educators to teach about the Holocaust, antisemitism and their meaning in today's world.

Through ADL’s Holocaust education program, [Echoes & Reflections](#), educators learn how to teach about the Holocaust and antisemitism, and how they impact today’s world. This program, a partnership between ADL, USC Shoah Foundation and Yad Vashem, offers a natural extension to BINAH by providing educators with important context, resources, and professional development to support classroom instruction. Since 2005, Echoes & Reflections, has impacted more than 72,000 educators, reaching an estimated 7 million students across the US.

Professional Development and Conferences

ADL conducts professional development training programs for pre-K – 12 staff. Each professional development training program is individually designed utilizing a primary needs assessment and a pre-workshop questionnaire to address participants’ professional development needs on recognizing explicit and implicit bias; developing bias prevention and response skills and strategies; increasing cultural responsiveness; and utilizing inclusive instructional practices. ADL’s staff also present at various conferences on similar topics.

Examples of professional development workshops and conference presentations include:

1. [From Safe Space to Brave Space: Facilitating Classroom Discussions on Bias, Injustice and Oppression](#)

This interactive forum will provide K-12 educators with strategies to facilitate a classroom environment in which all students are encouraged to share their experiences and perspectives on issues of bias, injustice and oppression. Join educators from across the Northeast to share your successes and challenges in creating brave space for discussions on bias and explore the ways in which ADL can support your efforts.

2. Transformative Approaches to Advancing Social Justice in Our Schools

This interactive workshop will focus on tools to help educators of various academic disciplines prepare, initiate and continue conversations about race, racism, and social justice. Through small and large group conversations, role plays, and action planning, participants will explore the following:

- Considerations to create brave spaces for honest dialogue
- How to set solid historical and contextual foundations for discussions about social justice
- Language for responding to challenging situations

3. Creating and Sustaining Equitable School Cultures

This presentation will focus on creating and sustaining school cultures grounded in equity, through an examination of systemic barriers that inform personal and structural bias. Workshop participants will be challenged to think critically about how individual practices and school policies can reinforce or interrupt systems of inequity and move historically marginalized students away from or towards opportunity and access. Through interactive activities, participants will develop and practice using language that allows them to navigate situations around bias and discrimination with intentionality, clarity, and confidence.

Online Resources

Lesson Plans

Our collection of K-12 classroom blended and online learning solutions for educators and students promotes critical thinking and learning around historical and current events topics through the lens of diversity, bias and social justice.

Lesson plans are available for free on our website and are consistently updated to cover current events. The most recent lesson plans are:

- [The Covid-19 Vaccination and Equity](#)
- [10 Ideas for Teaching Black History Month](#)
- [The 2020 Presidential Election: What Can We Learn from Victory Speeches?](#)

Books Matter

During this time of crisis and change, many are home with children of all ages. If you are looking for books to read, ADL's collection address issues of identity, bias and bullying. Our featured books come with discussion guides for teachers and parents.

Each month, our featured [Book of the Month](#) comes with two discussion guides: one for the classroom and one for the home. Our parent/family discussion guides include conversation starters, talking points, related books and additional resources.

Table Talk: Family Conversations about Current Events

Families often want to discuss news stories and other timely societal events. It's a great opportunity to engage children in rich conversation, share important values and encourage lifelong interest in the news. These talks can happen on the way to school, during a walk or over a meal. [Research](#) shows that dinnertime conversation benefits the health, emotional and academic outcomes for children of all ages. Each Table Talk guide below includes a topic summary, questions to start the conversation and dig deeper, ideas to take action and additional resources.

Here are some tips for discussion:

- *Find out what young people know and use the summary information to expand upon their prior knowledge. Ask what else they want to know and research together to learn more.*
- *When discussing the topic, ask young open ended questions that deepen the conversation. Be mindful not to judge their responses and listen thoughtfully.*
- *Think together about a child-level action they can take; this can be something they do on their own or something you do together or as a family.*

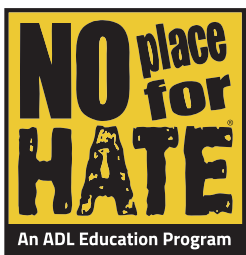
Here are a few samples:

- [The Dangers of Misinformation](#)
- [Propaganda, Extremism and Online Recruitment Tactics](#)
- [Let's Talk about Voting!](#)



11.c

Attachment 11.c: NPFH 2021 Resource Guide NEW ENGLAND (4701 : Discussion on outreach to ADL)



No Place for Hate[®] Coordinator Handbook & Resource Guide 2021–2022





About ADL

ADL is a leading anti-hate organization. Founded in 1913 in response to an escalating climate of antisemitism and bigotry, its timeless mission is to stop the defamation of the Jewish people and to secure justice and fair treatment to all. Today, ADL continues to fight all forms of hate with the same vigor and passion. ADL is the first call when acts of antisemitism occur. A global leader in exposing extremism, delivering anti-bias education and fighting hate online, ADL's ultimate goal is a world in which no group or individual suffers from bias, discrimination or hate.

A leader in the development of materials, programs and services, ADL builds bridges of communication, understanding and respect among diverse groups, carrying out its mission through a network of 26 regional offices in the United States and abroad.

ADL's Education department provides educational programs, training and resources. Our anti-bias and bullying prevention programs for grades PreK–12 (A World of Difference® Institute and No Place for Hate®) assist educators and students in understanding and challenging bias, building ally behaviors, and challenging injustice. Our work in confronting antisemitism (Words to Action™) empowers middle school, high school and college students with constructive responses to combat antisemitism. Our Echoes & Reflections program helps students explore and critically reflect on the lessons of the Holocaust.

About ADL Education & The No Place for Hate® Initiative

ADL Education is inspiring a generation to challenge bias in themselves, others and society in order to create more inclusive learning communities.

No Place for Hate is a collaborative initiative that provides PreK–12 schools with an organizing framework for students, administrators, teachers and family members to develop long-term solutions for creating and maintaining an inclusive and equitable climate. No Place for Hate schools receive their designation in the following ways:

- Building inclusive and safe communities in which respect and equity are the goals and where all students can thrive.
- Empowering students, faculty, administration and family members to take a stand against bias and bullying by incorporating new and existing programs under one powerful message.
- Sending a clear, unified message that all students have a place where they belong and should be treated equitably.

The No Place for Hate® registered trademark is the sole property of ADL and at all times must be used only with the permission of ADL and in the manner consistent with the goals of this initiative. Please consult your local ADL office before using the logo in your school's program and materials.



Contents

Welcome.....	7
No Place for Hate® Spotlight.....	9
Getting Started	
How to Become No Place for Hate.....	11
Building and Maintaining Your No Place for Hate Committee.....	13
Signing the No Place for Hate Pledge.....	16
Activity Planning Recommendations	
Activity Guidelines.....	19
Why Discussion is a Requirement.....	20
Move on From Kindness. Schools Need to Foster Social Justice.....	20
Moving from Safe Classrooms to Brave Classrooms.....	22
Let's Get it Right: Using Correct Pronouns and Names.....	24
Sample Activities	
Sample Activities.....	27
Identity & Culture Activities.....	27
Examining Bias Activities.....	28
Bullying Awareness & Prevention Activities.....	30
School Climate Activities.....	31
Social Justice Activities.....	32
Virtual Activities.....	33
Policy Expectations.....	36
Self-Assessment Surveys.....	38
Additional ADL Education Resources	
Expanding Your Impact.....	41
ADL Education's Incident Response.....	42
Responding to Incidents of Hate and Bias: Best Practices for School Administrators.....	42
ADL's Online Resources.....	44
Definitions Related to Bias and Bullying.....	46
Creating an Anti-Bias Learning Environment.....	50



Welcome

Dear friends,

Welcome to the No Place for Hate® Resource Guide! The 2020-2021 school year proved to be highly unpredictable and incredibly challenging for the whole world due to the COVID-19 pandemic. Schools were particularly impacted as students, educators and families had to operate in a new and ever-changing environment, including remote learning, hybrid learning and returning to in-person schools. And yet, our 1,600+ No Place for Hate schools partnered with us to virtually adapt and continue their amazing work! Through student voice and leadership, we have seen schools tackle issues of bias, bullying and injustice in new and interesting ways. Among the wide diversity of school size, location, demographics and projects, all of our schools have something important in common: they all engage in meaningful and ongoing dialogue around these challenging issues.

The 2021-2022 school year will bring on a new set of challenges as schools focus on full re-entry and students settle into the “new normal” in their learning communities. With the social isolation, increase in online bias and hate, and lack of equitable access that last year brought, it is extremely important for schools to focus on the learning environment as much as the learning itself. We know that focusing on bias, hate and bullying through No Place for Hate makes a difference in the lives of young people, educators and schools. No Place for Hate empowers students to spark dialogue around these concerning trends in order to address the issues that impact school climates. And these conversations will be crucial to a successful transition from remote learning back to in-person learning.

This year’s resource guide includes tools to maximize student engagement, virtual adaptations for schools that will continue in a hybrid/remote environment, considerations for successful committee engagement, pledge signing and activity planning, and additional resources and programs to supplement your school’s No Place for Hate journey.

Thank you for your commitment to providing your students with the opportunity to create a school that values the strength and depth that diversity brings. Together, we can make inclusive school environments where all students can truly thrive.



Angie McAllister, Ph.D.
Vice President of
Education



Caterina Rodriguez
Director of PreK-12
Education Programs



No Place for Hate® Spotlight

Debra Guachione, 8th Grade Civics Teacher

Reid Middle School, Pittsfield, MA

How has No Place for Hate impacted your school/district?

ADL's No Place for Hate program has had a tremendous impact on our students at Reid Middle School. With the challenges of remote/hybrid learning, it was very difficult to create opportunities for students to work together and address some of our school climate issues. Using Panorama Survey data from the past two years, we were able to quickly identify that students were not feeling supported by each other and they didn't always feel safe in their school building. One area of particular concern was the use of hate speech and bullying. By presenting several learning opportunities to our Peer Leaders, and then having them share what they learned with their peers we were able to focus on common goals - stamping out hate and eliminating bullying. Students signed the No Place for Hate wall and participated in several anti-bullying activities to raise awareness, including how to "Be a Better Bystander" and "Respecting Differences." After surveying the students, we are eager to have our Peer Leaders present a plan to our School Council that integrates "No Place for Hate" into our school improvement plan.

What do you think has been the biggest challenge in making your school/district No Place for Hate? How have you overcome that?

There were several challenges this year, in particular, since students were using zoom for more than half of their time spent on learning. The specific barriers in a remote setting included the ability for us to really see if students were engaged, interested, and participating. The challenges for our Peer Leaders were getting students to be part of the virtual learning. However, what we learned early on was that when students were present together in classes, in smaller groups, they were more willing to share their own personal experiences and engage. We also think that our Peer Leaders were more comfortable leading activities in groups of 10-12. This helped them gain confidence and it created a safe space for students to share. Our Peer Leaders also thought very hard about what some of the obstacles would be before they presented new material. By pre-teaching vocabulary and watching videos, students were able to make personal connections to some of the tough topics presented like bias, prejudice, and discrimination. Perhaps the most important part of our learning together this year was our ability to look at national issues and follow stories in the news. The national narrative presented many (too many) opportunities for us to talk about diversity and equity. This made the learning process for the students very real.

What advice would you give to someone who is considering joining the No Place for Hate movement?

Our Peer Leaders and community partners met last week, after the ADL Conference, and talked about how wonderful this journey has been. We all agreed that it was necessary to start the planning early in the school year to ensure that students are invested in learning by giving them choices. We also spent the first two months of the school year talking about civic engagement and civic duties, which made the conversations rich and more content-based. We studied Supreme Court cases like the Brown v Board of Education and Montgomery Bus Boycott, and we spent several weeks on the Civil Rights Movement. This historical context really set the stage for students to want to work together to create an atmosphere in their school community that would not allow discrimination, and instead, would promote identity and respect differences.

GETTING STARTED



How to Become No Place for Hate®

Over twenty years ago in 1999, ADL used research* and experience to design a self-directed program that effects positive changes in school climates. Since then, thousands of schools across the country have followed the steps below that are required to achieve the No Place for Hate designation.

Register.

Please fill out our online form at www.adl.org/bring-no-place-for-hate-to-your-school to learn how to register and receive everything you need to make your school No Place for Hate.

Form a Committee.

Select a coalition of students, at least two faculty and staff members, administrators and family members to lead your No Place for Hate efforts throughout the year to promote respect, equity and inclusion for all.

Sign the Pledge.

Have students and staff sign the No Place for Hate pledge (see page 16) that confirms their commitment to participate in making your school No Place for Hate. The signing can be done in a variety of ways, including online.

Implement Three Activities.

Develop and implement at least three schoolwide activities that enhance students' understanding of diversity, bias, social justice and inclusion, and which also foster equity and harmony in your school community. Please see page 27 for more details about what constitutes an approved No Place for Hate activity.

Submit the Paperwork.

Submit all of the required paperwork (e.g., activity forms, pledge forms, lesson plans, photos, videos, etc.) for approval. Reach out to your local ADL Education team for more information about submission requirements throughout the year.

Celebrate your Designation.

Congratulations! Once ADL reviews your paperwork and confirms that you have completed these steps, your school will be declared No Place for Hate and will be awarded a banner to commemorate this milestone.* Banners should be displayed prominently in your school (e.g., main office, front entrance) to demonstrate your commitment to being No Place for Hate. **Be sure to mark your calendar for No Place for Hate Day on May 13th, 2022, to join No Place for Hate schools across the nation in sharing your incredible efforts on social media using #noplacforhate.**

* Research includes:

1. Cohen, J., Espelage, D., Twemlow, S.W., Berkowitz, M.W. & Comer, J.P. (2015). Rethinking Effective Bully and Violence Prevention Efforts: 9 Promoting Healthy School Climates, Positive Youth Development, and Preventing Bully-Victim-Bystander Behavior. *International Journal of Violence and Schools* (15). Bordeaux: International observatory on violence in school.
2. Weissbourd, R.; Bouffard, S.M.; Jones, S.M. (2013). *School Climate and Moral and Social Development*. New York City: National School Climate Center.
3. Hart, R. (1992). Children's Participation from Tokenism to Citizenship. *Papers inness92/6, Innocenti Essay*. Florence: UNICEF Innocenti Research Centre.

** Schools must reapply each year to continue to be designated No Place for Hate.

Recommended Best Practices

Although not required, we strongly recommend you include these best practices as part of your No Place for Hate® efforts.

Survey your students.

Climate surveys are a great way to amplify students' voices and make students feel that they are active participants in creating a school culture where everyone feels welcomed, supported and included. Survey data can also help you design activities that focus on the most important diversity and equity issues in your school. Our experience has shown that schools implementing surveys report greater program buy-in among students overall.

Implement ADL anti-bias curriculum.

ADL has created anti-bias curriculum guides that provide sequential lessons to help students in grades K-12 build a strong foundation for analyzing and confronting bias. These curriculum guides are a great way to reach the entire student body consistently throughout the school year through regular classroom instruction, required classes and/or dedicated advisory periods. To learn more about the curricula, please visit www.adl.org/education/resources/tools-and-strategies/anti-bias-curriculum-guides

Host an ADL workshop.

Schedule one or more of ADL's interactive anti-bias and bullying prevention workshops as a supplement to your No Place for Hate activities. Some workshops can be counted as No Place for Hate activities depending on the number of people trained and how they share their learning with the whole school community. Learn more about ADL programming opportunities on page 41.

Take the No Place for Hate online coordinator course.

In order to support your journey, ADL offers Making Your School No Place for Hate - an online, self-paced, 45-minute course for coordinators and administrators. This course provides helpful implementation tips, pitfalls to avoid, best practices, and additional implementation resources for every step along the pathway to designation. To go through the course, please visit <https://adl.org/education/NPFHCoordinatorCourse>

Additional Support

When any incident of bias, bullying, discrimination or harassment occurs (p. 42), schools are welcomed to reach out to ADL for additional support in addressing them. ADL reserves the right to revoke the No Place for Hate status of any school that fails to address incidents of bias and bullying that may arise.

Schools should keep ADL regularly informed of their progress throughout the year, so their work can be recognized on ADL's social media channels!

Building and Maintaining Your No Place for Hate[®] Committee

A strong No Place for Hate committee is the foundation for creating sustainable positive change in your school's climate. It is important to consider the ratio of students to adults, representation of different demographic groups across the school on the committee, when and where the committee will meet, how often the committee will meet, and what role the committee will play throughout the year. Below are a few tips to help you build a strong committee.

Recruiting Committee Members

ADL recommends that you have at least two No Place for Hate coordinators, one administrator, one additional school staff member, one family members and several students on your No Place for Hate committee. The ideal range for committee size is between 15-25 members, but you may choose to have more if you have specific ways to actively engage members.

Begin by sending out information in several ways (regular mail, email, social media, website announcements, virtual classroom postings, etc.) about No Place for Hate in the communications you send to families and students at the beginning of the school year, including clear expectations for participation. Have a dedicated way for students and family members to express interest in joining the committee (e.g., Google form, email reply, etc.). Make your committee member selections based on the list of volunteers. Establish a committee membership agreement; it is essential to provide clarity about the time commitment, the goals and role the committee, and communication expectations involved with participation.

How, When and Why the Committee Will Meet

We recommend creating a consistent schedule of meetings at the beginning of the year so all members understand the time commitment for joining the committee. ADL requires that the committee meet no less than four times during the school year as a full committee. Beyond that, you can choose to convene sub-committees to discuss specific tasks as needed. To ensure that all committee members know the expectation of participating on the committee, ADL recommends that a committee agreement is established by the first meeting date. In this document, you can include the schedule of meetings, where those meetings will be conducted and guidance for participation. We also recommend having specific agendas for each meeting that engage committee members and allow them to share any progress with each other.

Select a method of communication that works for all committee members. Below are options for tools to connect with committees both virtually and remotely.

Virtual Engagement (all students have access to devices and internet):

1. Use a messaging app.

Messaging apps are a great way to engage with families and students online. Common Sense Media has a great list of options, which you can review by clicking [here](#). Most apps have a free option for educators.

2. Explore a learning management system.

Learning Management Systems (LMS) are tools for educators to connect with families and students, deliver online courses, track student progress and so much more. It is possible your

school has already been using an LMS system prior to the pandemic, but if not, there are a variety of options for educators. [Google Classroom](#), [Moodle](#), [Sutori](#), and [Microsoft Teams](#) are a great place to start. These systems provide options for live interaction as well as discussion boards for committee members to interact on their own schedule.

Remote Engagement (all students do NOT have access to devices and internet):

3. Use a messaging app that does not require data.

While many messaging apps use data, there are some that work similarly to a text message. [Remind](#) is a resource used by many schools to keep in touch with students and families and can be a great way to connect to your committee provided they have a cell phone and can receive text messages.

4. Create a Phone Tree.

[Phone trees](#) used to be the primary method of communication prior to the availability of computers and the internet. This can be used to keep the committee informed about activity planning and options throughout the year.

Note: If your school or community is struggling to provide internet access and devices to all students and you are interested in receiving assistance, consider contacting the non-profit organization [EveryoneOn](#), whose mission is to connect under-resourced communities with affordable internet services. In light of the COVID-19 health crisis, EveryoneOn has created a [tool kit for schools and districts](#).

Engaging Your Committee

The committee is responsible for planning and implementing all things related to No Place for Hate (e.g., schoolwide pledge signing, optional cultural assessment, and activity development). We recommend laying out the specific goals and tasks that the committee will be responsible for, so your time together is productive and efficient. One way to do that is to divide your committee into subcommittees, with each being responsible for implementing one specific task throughout the year (e.g., getting signatures for the pledge, activities, etc.). We also think it is important to celebrate the great work your committee will be doing.

For schools that may experience disruptions to typical on-site learning, consider the following ways of bringing your committee together online:

- Meet through video or conference calls.
- Share agendas on a Google Doc and set deadlines for comments and questions from committee members.
- Meet in smaller subcommittees that focus on different pieces of No Place for Hate at your school.
- For elementary student committee members, email their parents multiple choice and/or free response questions about No Place for Hate components in a Google survey.

Sample Agendas

Laying a good foundation at the start of the year helps set up your committee for success. It can be challenging to know how to engage a committee at the start, especially for coordinators or schools that are new to No Place for Hate. Below are some sample agendas (30-45 minute) that you can use to help kickstart the process.

First meeting:

- What is No Place for Hate?
 - Explore the No Place for Hate website at <https://noplaceforhate.org>
 - Watch the promo video at <https://youtu.be/MgzZmG4Na-c>
- Why are we here?
 - Ask each member of the committee to briefly share why they want to help lead this work.
- Review the No Place for Hate pledge.
 - What does each line mean to our committee?
- What do bias and allyship mean?
 - Ask for examples that committee members have observed at school.
- Action items for next meeting.
 - Review the glossary at the end of this guide (p. 46) to understand different manifestations of bias.
 - Brainstorm which kinds of biases are most prevalent at your school that you would like to address through No Place for Hate efforts this year. You may use the self-assessment surveys in this guide (p. 38) to help guide your brainstorm.

Second meeting:

- Discuss action items.
 - Are there any questions about the definitions in the ADL Education glossary?
 - Share our brainstormed examples about bias-related issues that are prevalent at the school.
- What issues in our school environment should we prioritize for our three activities?
 - Discuss the possibility of instituting a climate survey to learn what is most important to students.
 - If not a climate survey, prioritize the issues that were brainstormed as a committee. Be sure that all committee stakeholders' voices are heard in this process.
- Plan the No Place for Hate pledge signing.
 - How will we roll out the pledge?
 - Which stakeholders do we need to partner with for our roll out plan?
 - How will we get buy-in from the students?

Signing the No Place for Hate® Pledge

The No Place for Hate pledge is an essential kickoff at the beginning of the year. It rallies your school's stakeholders to do their part to make your school No Place for Hate. The signing of the pledge should be led by the No Place for Hate Committee and can be completed in a variety of ways:

- Make a banner or artwork out of the pledge to hang in a prominent location on campus.
- Complete individual classroom projects, such as classroom posters.
- Create an online survey and gather e-signatures from students, staff and parents.
- Present the pledge as part of a schoolwide assembly or pep rally.
- Have students present via video or morning announcements and gather signatures in every home room.
- Have NPFH Committee members present the pledge, classroom by classroom over a period of time.

Consider how your committee's students can engage their peers about what the pledge means to them. The following questions can help your committee assess your school climate and identify focus areas for your No Place for Hate efforts:

- What parts of the pledge stand out to you? Why?
- What parts of the pledge are strong points in our school?
- What parts of the pledge does our school struggle with?

Remote/Virtual Pledge Signing Considerations

For schools planning to sign the pledge virtually, consider mixing and matching the following methods to actively engage the whole school community in signing the pledge:

- Create an agreement via Google forms to have students, staff and families 'e-sign'.
- Use Flipgrid to create a video gallery of students either reciting the pledge or agreeing to the pledge.
- Have students submit artwork of their own No Place for Hate banner or a part of the pledge that speaks to them. Give a variety of options for submission (email, virtual classroom, text, etc.).
- Create a social media campaign and a hashtag for students to share why they are taking the No Place for Hate pledge.
- Have your committee create a video that explains what the pledge means to your school and ask all students to share in their virtual classrooms which part means the most to them and why.

The possibilities are endless, so get creative!

The No Place for Hate® Pledge

Elementary School

- I promise to do my best to treat everyone fairly.
- I promise to do my best to be kind to everyone—even if they are not like me.
- If I see someone being hurt or bullied, I will tell a teacher.
- I will help others to feel safe and happy at school.
- I will be part of making my school No Place for Hate.

Middle/High School

- I will seek to gain understanding of those who are different from me.
- I will speak out against prejudice and discrimination.
- I will reach out to support those who are targets of hate.
- I will promote respect for people and help foster a prejudice-free school.
- I believe that one person can make a difference—no person can be an “innocent” bystander when it comes to opposing hate.
- I recognize that respecting individual dignity and promoting intergroup harmony are the responsibilities of all students.

La Promesa de No Place for Hate® (Español)

Escuela Primaria

- Prometo hacer mi mejor esfuerzo para tratar a todos de manera justa.
- Prometo hacer lo mejor para ser amable con todos, incluso si no son como yo.
- Si veo que alguien está siendo herido o acosado, se lo diré a un maestro.
- Ayudaré para que los demás se sientan seguros y felices en la escuela.
- Contribuiré para que en mi escuela no haya lugar para el odio/No Place for Hate.

Escuela Secundaria y Preparatoria

- Buscaré comprender a quienes son diferentes de mí.
- Me expresaré en contra del prejuicio y la discriminación.
- Me acercaré y apoyaré a quienes son objetivos de odio.
- Promoveré el respeto hacia las personas y ayudaré a fomentar una escuela libre de prejuicios.
- Creo que una persona puede hacer la diferencia—ninguna persona puede ser un espectador “inocente” cuando se trata de oponerse al odio.
- Reconozco que respetar la dignidad individual y promover la armonía entre los grupos es responsabilidad de todos los estudiantes.

ACTIVITY PLANNING RECOMMENDATIONS

What is a good ally?

dependable
supportive

stands up
protective
on your side

brave

loyal

understanding

caring

helpful

encourages

role model
mentor

good listener
has your back

influence

good friend

family

genuine desire to help

trustworthy

courageous

non-judgmental

honest

respectful

empowering

Activity Guidelines

Each year, we at ADL are inspired by the creativity and care that goes into the development and implementation of schools' No Place for Hate® activities. We see students across the country being asked to examine their identities, reflect on their biased behavior and learn new ways to challenge bias and bullying in themselves, others and society.

Below are the guidelines ADL has developed that all activities must follow in order to qualify as a No Place for Hate activity. The goal is to challenge *all* students to think critically, instill a sense of empathy and empower students to act as allies for one another.

Note for schools that experience COVID-19 disruptions: If your school has the access and bandwidth to implement three schoolwide activities either in person or online, please continue to do so. If disruptions to typical on-site learning make the implementation of schoolwide activities with active discussion challenging, please reach out to us to figure out what works for your school. We acknowledge that there are different kinds of potential obstacles for each school and want to ensure No Place for Hate designation is not only achievable, but also equitable.

No Place for Hate Activities Must:

- Involve students in the planning and implementation.
- Focus on inclusivity and community building.
- Involve all students in active learning.
- Involve all students in discussion (see page 20 for more details).
- Address school-based issues.
- Take place throughout the school year, with three or more activities spread out over time (e.g., one in each season: fall, winter and spring).

No Place for Hate Activities Should Not:

- Include signing the pledge, which does not count as an activity because it is a separate step to earn your school's No Place for Hate designation.
- Be done by only one classroom or a small group of students unless that group then engages the rest of the student body in a way that follows the activity guidelines.
- Use only passive learning (e.g., watching a speaker without an opportunity to process what has been taught in a follow-up discussion or lesson).
- All take place over one week (activities that take place over one week can be submitted as one activity).

Why Discussion is a Requirement

The success of No Place for Hate® relies on the promise that all members of the school community have a voice in creating a plan that leads to lasting change. The foundation of that change is a strong coalition of school leaders (including students, educators and family members) who have a stake in the outcomes of the plan.

There are no more obvious stakeholders than the students. Too often, adults assume they know what is needed to support young people, but change can be elusive if we do not actively engage students in the process. One way to maximize engagement is through dialogue. This is why it is essential for No Place for Hate committees to create activities that amplify students' voices and provide them with an opportunity to participate in active discussion, whether during an activity or through follow-up discussions in the classroom.

Here are a few common prompts to help start the conversation during or after an activity:

- What is one word to describe how you feel about what you have learned?
- What is something you learned today that you did not know before?
- What do you think was the biggest class (or group) takeaway?
- What is something you will do differently because of what you learned today?
- How will what you learned influence how you behave towards others moving forward?

Facilitating a dialogue around topics of bias and bullying may seem daunting to some. Remember that it is okay not to have all of the answers. What's most important is to provide a space where students feel their voices are being respected and valued. That is when real change can begin to take shape.

For more information and additional resources, visit www.adl.org/education.

Move on From Kindness. Schools Need to Foster Social Justice.

Each year, ADL receives activities from participating No Place for Hate® schools that focus on kindness. Although learning how to demonstrate kindness is an important part of a child's social and emotional development, ADL highly encourages schools, in designing their activities, to move beyond kindness to social justice. Jinnie Spiegler, ADL's Director of Curriculum and Training, explains why this distinction is important in the following article that originally appeared in Education Week.

We know kindness when we see it: someone performs a generous deed, listens with a sympathetic ear, offers a heartfelt compliment to a friend, family member or even a stranger. We see kindness promoted visibly through public awareness campaigns like Random Acts of Kindness, The Great Kindness Challenge and Choose Kind, linked to the popular children's book *Wonder*.

Conversations about kindness abound in schools and can be part of character education instruction and social and emotional learning skill development. The acts of kindness that take place in schools (e.g.,

holding the water fountain for someone, reading a book to a younger student, bringing a treat to someone, asking the teacher if they need help) are regularly encouraged, affirmed and applauded. Many parents feel it is their obligation to instill this trait in their children from a young age. Indeed, kindness is something our whole society can get behind—it is a worthy aspiration to raise children who are helpful, generous and caring.

Sometimes in schools and in society at large, kindness and social action get conflated. They are not the same. It is important to make the distinction because many schools hope to engage young people in social action work, yet mistakenly focus on kindness because they think it will lead to social justice outcomes.

Kindness, defined as being “of a sympathetic or helpful nature,” usually involves an action between one person and another. It’s typically a solo act. Social action, defined as “activity on the part of an interested group directed toward some particular institutional change,” generally involves a group of people who work together to bring about institutional change so that society advances, and people experience improved safety, freedom and equity. Institutional or systemic change can take place in a school, a community or society as a whole.



The aftermath of the recent shooting at Marjory Stoneman Douglas High School provides a useful example of the difference between kindness and social action. The acts of kindness directed toward the survivors,

victims and their families included notes of sympathy and concern, kind quotes, tree planting, coupons for free items and more. As this was taking place, the world watched as Parkland students engaged in social action and activism in order to address the root of the gun violence problem and to enact systemic change.

These actions included walkouts and protests, meetings with lobbyists and members of Congress; petitions, op-eds and letter writing; and deep engagement on social media and with the press and various media outlets. Further, they sparked activism in others, which shows how social action can be contagious and that the affected parties are not the only ones who should get involved.

While kindness can set a foundation for social action because it fosters empathy in young people and motivates them to help others, the two are not the same and action does not happen on its own. If we want young people to understand how to engage in changing systems and society, it is critical that adults encourage them to do so by providing opportunities to practice while imparting the necessary skills and knowledge. The first step is to facilitate students’ learning about the issues in a rigorous and complex way, and then to get them involved in action, advocacy and/or activism.

For example, if students are passionate about the problem of homelessness, the tendency might be to have young people volunteer at a homeless shelter or soup kitchen or read aloud to children who are homeless. These are wonderful activities that will promote empathy and a sense of connection on a human level. But if we want children to consider how to transform the problem of homelessness, we need to help them understand the economic and social roots of the problem and consider ways to advocate for affordable housing and improved economic conditions for all people, especially those living in poverty.

Similarly, if students want to tackle the issue of educational equity, they can't stop at a helpful activity such as tutoring children. That will definitely help some individual children, but in order to affect systemic change, students need to analyze and challenge the opportunity/achievement gap, school funding inequities and the school-to-prison pipeline (to name a few). After that, they can consider ways to address those issues through policy and legislation, leading to local and national solutions.

We should teach, model and promote kindness as much and as often as we can. But we also need to teach and empower young people to engage in social action: that is the only way we can ultimately change societal inequities and bring about a truly just society.

Moving from Safe Classrooms to Brave Classrooms

In fostering inclusive, equitable and safe schools, we encourage educators to develop group guidelines for respect and safety in the classroom. However, there is often a need to go further and frame guidelines around the concept of bravery instead of safety.

There are a few reasons for this. While these group agreements work for some, they don't always help everyone feel safe, respected or included. For example, people of color and/or those who are members of marginalized groups may want to share real and sometimes harsh testimony about their experiences, something they might need to do in order to feel included and be able to participate. They may want to caucus with others in their same identity group in order to feel safe. Or, they may feel that being able to challenge others' bias is what is necessary to build empathy. Therefore, what they require to feel safe may not subscribe to the typical list of guidelines.

In diverse groups and especially when the goal is equity and safety for all, it is important to be aware that the word "safety" is open to interpretation and how it is understood depends on the person. People may have different ideas about what it means to "feel safe," "assume good will," "participate fully," etc. These different perspectives may be attributed to whether one is part of a marginalized or majority group in school or society.

Brave is defined as: "To have or show physical, emotional or moral strength in the face of difficulty, danger or fear." When you're brave, you do something that is hard for you. In a classroom or group, bravery goes both ways—giving and receiving. A brave space is one in which we accept that we will feel uncomfortable and maybe even defensive when exploring issues of bias, injustice and oppression. A brave space is one in which we take risks, doing so with care and compassion.

Here are quick strategies for setting up guidelines for brave spaces/classrooms:

- Ask students to define brave. You can use the definition above or come up with one that works for you and your students.
- Have students close their eyes and think of a time they felt brave; then ask them to share some of the images, thoughts, feelings and behaviors that came to mind. Alternatively (especially with younger students), you can have them draw something that reflects a time they felt brave.
- Have students talk with a partner (or share in concentric circles, if time permits) asking students to respond to the following prompts.
- What does brave mean to you?
- When was the last time you felt brave in school?
- What do you need to feel brave in this classroom?
- Have students share their thoughts aloud or on post-it notes that you can hang somewhere in the classroom for all to see. From these conversations and shared thoughts, have students come up with a list of guidelines for being brave in the classroom.
- Make sure everyone agrees with the guidelines; you can get verbal agreement or have everyone sign a pledge or a classroom poster that lists the guidelines.

Here's a list of possible guidelines for brave spaces/classrooms (keep in mind that it is best if the list is generated from the group):

- Be open to different and multiple viewpoints and perspectives, especially those that differ from yours.
- If people share experiences and feelings that are different or unfamiliar to you, show respect by taking them seriously and understand the impact of your response.
- Explore, recognize and acknowledge your privilege.
- Even if you are uncomfortable or unsure, contribute and take risks.
- Make space by sharing speaking time; try to speak after others who have not spoken.
- Listen actively, even and especially when people say things that are difficult to hear.
- Find ways to challenge others with respect and care and be open to challenging your own points of view.
- Work hard not to be defensive if people challenge what you say or the impact of your words.
- Commit to confidentiality and not disclosing what people say; at the same time, take responsibility for sharing important messages and themes outside the group or class. One way to think about this is: "stories stay, lessons leave."

For the full version of this article, see: www.adl.org/education/resources/tools-and-strategies/moving-from-safe-classrooms-to-brave-classrooms

Let's Get it Right: Using Correct Pronouns and Names

We use people's pronouns and names frequently and in regular, everyday communication, both verbally and in writing. We do it almost without thinking. Because names and pronouns are the two ways people call and refer to others, they are personal and important. They are also key facets of our identity. Therefore, calling someone by the wrong name or "misgendering" them by using incorrect pronouns can feel disrespectful, harmful and even unsafe.

From an early age, many were taught that pronouns should follow specific rules along the gender binary: "she, her and hers" for girls and women and "he, him and his" for boys and men. However, as our society has progressed in understanding gender identity, our language must also be updated. It should be accurate and convey understanding and respect for all people, especially for those who are transgender, gender non-conforming and non-binary.

Because some people identify themselves outside the gender binary (gender binary is the idea that gender consists of two distinct, opposite and disconnected categories—male and female), it is important to make sure you know the specific pronouns people use, whether they use female, male or gender-neutral pronouns. Be mindful that the pronouns "he" and "she" come with a set of expectations and gender norms about how people express their identity. For many, these terms are limiting and confining, so gender-neutral options are preferable.

If you use the wrong pronoun or name, people may not correct you because they may feel awkward, uncomfortable or unsafe. If you don't know what people's pronouns and names are, you can listen to how they or others refer to them, or you can ask. There are suggestions below about how to do this in a school or classroom setting.

There has been a much-needed movement away from asking and identifying pronouns as "preferred." For example, people used to ask, "What is your preferred pronoun?" This question is problematic because a person's pronouns are not just "preferred"—they are the pronouns that should be used.

Using correct names and pronouns shows respect, acceptance and support to all students, especially those who are transgender, gender non-conforming and non-binary. While some schools and school districts have specific policies on a range of issues regarding transgender and gender non-conforming students, below are practical tips and strategies for showing respect to students.

At the beginning of the school year or new semester, many teachers distribute a "get to know you survey" to learn more about their students: how they best learn, their hobbies/interests outside of school, what they did over the summer, etc. You can add a question about pronouns such as: "What are your gender pronouns?" or "Which pronouns do you use?" You can also ask what name they use. This sends a message that you want to know their accurate name and pronouns, and it gives you the information you need to get it right.

You should also ask whether it's okay or not to use their name and pronoun in communication home to parents/family members and in parent-teacher conferences. Keep in mind that some students may not disclose this information to some or all family members.

If you know students' correct pronouns and names, use them in class and do not rely on "official" or roster information. You can act as a role model by sharing your pronouns and using them when introducing yourself. Be careful not to make assumptions about someone's pronouns and name and at the same time, be sensitive to students who may not feel ready or comfortable to disclose this information. If you make a mistake in using the wrong name or pronoun, quickly self-correct and move on. Similarly, if another student or adult uses an incorrect name or pronoun, make the correction and continue the conversation. Don't dwell unnecessarily on it, which could inadvertently make the student feel more uneasy.

If you do not address names/pronouns in a survey or another way, students may talk with you individually after class about their name or pronoun. Listen to what they say without judgment, ask clarifying questions and let them know you will correctly use their name or pronoun. As stated above, the best way to ask is: "What are your gender pronouns?" or "Which pronouns do you use?"

There are a few ways to start a discussion about the use of pronouns. Always be mindful not to single anyone out, and don't engage in a class discussion if you feel it would increase the discomfort, rather than minimize it.

One way is to have students read an article about the history of the pronoun "they" such as "A Brief History of Singular 'They'" or "Even the staunchest grammarians are now accepting the singular, gender-neutral 'they.'" Or you can have students read something like "Here's Why Gender Pronouns Are So Important." There are also short videos that can serve as conversation starters about pronouns such as Why Gender Pronouns Matter or Why Pronouns Matter For Trans People. After you read or watch, ask open-ended discussion questions like: What are your thoughts and feelings about what you read/watched? What did you learn that you didn't know before? How are you thinking differently about this now? You could also assign a reflective writing assignment or a "quick write" to have students express their thoughts.



Always be aware that while students may share their pronouns and name with you, this doesn't mean they have shared it with other teachers, students, friends or family members. And don't share this information without express permission from the students themselves.

Below is a list of pronouns. This is not a comprehensive list and other pronouns, or no pronouns at all, might be preferred by some transgender people. The correct pronouns for a person do not necessarily align with the associated gender identity or expression. Be mindful that cisgender as well as transgender, gender non-conforming and non-binary people may use feminine, masculine or gender-neutral pronouns.

Feminine: She, her, hers

Masculine: He, him, his

Gender Neutral: They*, them, their

* Many dictionaries have recognized "they" as a singular pronoun for years, including *Oxford English Dictionary*, *Merriam-Webster's Dictionary* and dictionary.com.

SAMPLE ACTIVITIES



Sample Activities

For No Place for Hate® activity ideas, you can check out our online No Place for Hate Activity Library. It is a collection of elementary, middle and high school activities that qualify towards your No Place for Hate designation. All the activities are linked to one of our free, online lesson plans and include a range of activities and opportunities for discussion. And best of all, every activity is **pre-approved by ADL**. For more information, visit www.adl.org/no-place-for-hate-activity-library.

In addition to the Activity Library, we have listed below some sample project ideas categorized by topic and indicating appropriate grade level, including ideas for virtual activities. Please remember that it is your school's responsibility to tailor each activity to meet the No Place for Hate Activity Guidelines found on page 19. Make sure that students are able to participate in discussion and active learning around the chosen theme or topic. If you have any questions, please contact your local ADL Education staff if you have already registered. For registration inquiries, please fill out our online form at www.adl.org/bring-no-place-for-hate-to-your-school.

Identity & Culture

“I AM ...”

Grade level: Elementary School

Lead a discussion with students about similarities and differences between people. Talk about the importance of respecting people's differences. Give the students a piece of paper and ask them to draw a picture of themselves that shows aspects of their identity (e.g., physical traits, identity groups to which they belong, talents, hobbies, etc.). All of the self-portraits can then be collected and put together to make one giant collage for the hall titled “Diversity = Strength.”

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/who-am-i-identity-poems

“HUMANS OF ...” INSTAGRAM CAMPAIGN

Grade level: Middle School/High School

Inspired by the “Humans of New York” campaign, lead a discussion with students about different aspects of identity (e.g., race, religion, language, gender/ gender identity, sexual orientation, etc.). Following this discussion, create a student-led team that will interview students about aspects of their identities and post one of those interviews daily, with an accompanying picture, on your school's Instagram account. Interviewers should encourage people to share an aspect of their identity that makes them unique and include the variety of languages represented at your school, where appropriate. Be sure to get permission from students to post and monitor the Instagram account to respond to any negative or biased feedback.



NO PLACE FOR HATE SCAVENGER HUNT

Grade level: Elementary School

Lead a discussion with students about what makes people both different and similar. As homework, ask students to write three to five things that make them stand out from others in their school (e.g., large family, famous people they've met, interesting talents, etc.). Collect everyone's lists and create 5-10 different bingo boards that feature one identified student characteristic per square (e.g., "I can juggle five balls," or "I have 42 aunts and uncles"). Hand one bingo board to each student and explain that they will have a certain number of minutes to go around the room and try to find out which unique quality belongs to which student. When they find a match, they should have that student initial that box. After the time is up, have everyone take a seat and see how well everyone did filling out their bingo board. A great follow-up discussion could include things that surprised them and how this activity might change how they interact with others moving forward.



Examining Bias

WHEN I GROW UP

Grade level: Elementary School

Lead a discussion about stereotypes using ADL's lesson "Mo'Ne Davis and Gender Stereotypes" (link below). As an extension to the lesson, ask students to think about ways in which stereotypes impact how people treat each other in their school. *Are kids of different genders treated differently? Are students treated differently on the basis of race? If so, why?* Ask students to share a time that they were discouraged from doing something because of an aspect of their identity. Finish the activity by giving each student a piece of paper and ask them to draw a picture of possible jobs/professions they're interested in pursuing when they grow up. Encourage them to think big, even if it's something that society says they shouldn't be. Collect the students' drawings and post them in a prominent place in the school as a reminder to challenge stereotypes. Have a small group of older students read books to students in the younger grade classrooms (PreK-1) that share the themes of how important it is to allow people to be who they are and follow their dreams.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/mone-davis-and-gender-stereotypes

YOU ARE WELCOME HERE

Grade level: All Grades

Lead a discussion with all students about immigration and refugees using ADL's curriculum unit "Huddled Mass or Second Class: Challenging Anti-Immigrant Bias in the U.S." (link below). As an extension to the lesson, ask students why it's important to learn about the stories of immigrants and refugees in connection with making their school No Place for Hate. *Do they see a connection between the experience of immigrants and refugees to the U.S. and new students in their school? What are the similarities? What if those new students are immigrants and refugees?* Brainstorm ways to make new students feel welcome and announce that the school will be starting a Welcoming Committee to oversee the implementation of these ideas. Allow students to sign up to join the committee. (Be mindful that you may have students or family members in your school who are documented and/or undocumented immigrants or refugees who may or may not know or disclose that information. Do not highlight individual students or families; do be sensitive to privacy concerns.)

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/huddled-mass-or-second-class-challenging-anti-immigrant

LISTENING JOURNAL

Grade level: Middle School/High School

Have students keep a listening journal for one week. As they listen to the people in their lives and to messages in the media (including social media), have them record in their journals examples of stereotypes, bias and discrimination that they experience, see and hear about throughout the week. Lead a discussion about their observations and the impact on their school culture. In response, have students create an Ally Board to share allyship strategies for students and staff to challenge the biased attitudes and behaviors that impact their school.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/slurs-offensive-jokes-and-how-to-respond

WORD SLAM

Grade level: High School

Lead a discussion with all students around the topic of microaggressions using the lesson below. Based on that discussion, have every student create original poetry, spoken word performances and raps that challenge the microaggressions they may have heard in school or while hanging out with friends. Each class can then pick their favorite poem/rap, which will be featured at a schoolwide Word Slam. Invite participants to present their work at PTO/PTA meetings, school board meetings or other school community events.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/microaggressions-in-our-lives

PYRAMID OF HATE

Grade level: Middle School/High School

The Pyramid of Hate is a useful tool to help students understand the prevalence of bias and how incidents of bias, discrimination and oppression work together to create and perpetuate systems of hate and injustice. Have students go through ADL's online Pyramid of Hate mini-lesson in preparation for discussions about how bias and hate can intensify when they are accepted and "normalized" instead of challenged and interrupted. Facilitate conversations with students to reflect on individuals' biases and on how they can address and interrupt the escalation of bias and hate in their school, community and society. You can then have students create visual pyramids of allyship to explore strategies that, at each level, they can use to address and challenge bias and hate.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/mini-lesson/student-pyramid-of-hate

Bullying Awareness & Prevention

ALLY COLLAGE

Grade level: Elementary School

Lead a discussion about bullying, and explore what ally behavior looks, feels and sounds like. As a follow-up to this conversation have each student draw on a piece of paper one ally behavior they commit to doing more of in the future. Have each student present their drawing to the rest of the class and add it to the other drawings with tape, so students can see the importance of being interconnected with their peers. This collage can be displayed in a prominent place in the classroom or school.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/identity-based-bullying

FROM BYSTANDING TO SUPPORTING

Grade level: Middle School/High School

This multiday activity begins with a classroom discussion that defines what bullying is and what it is not (see definition on page 50), then moves into a discussion about the behaviors that people exhibit in bullying incidents with a focus on "bystanding" (see the list of behaviors on page 42). Conclude this discussion by asking students and teachers to write on a blank notecard about a time that they observed a bullying incident but didn't support the target, why they didn't support the target and how it made them feel to be a bystander. Collect all of the notecards and display them in a place in the school where everyone can see them. Complete this activity with a second classroom discussion on a different day about ways to support targets of bullying. Conclude this discussion by having students and teachers write on blank notecards one way that they will commit to supporting targets of bullying (acting as an ally) in the future. Collect all of the notecards and display them on top of the notecards already displayed in the hallway.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/resources/tools-and-strategies/6-ways-to-be-an-ally-en-espanol

School Climate

TREE OF RESPECT

Grade level: Elementary School

As stated on page 20 of this guide, ADL urges No Place for Hate schools to go beyond kindness. We believe that a person can be kind to someone (e.g., hold the door open for someone, ask a teacher if they need help) without showing them respect (e.g., not playing with someone because of their gender, making fun of someone's lunch because it looks different). Lead a discussion about the topic of respect. *What is it? Is it the same as kindness? How are they different? Why should we focus on respect rather than only kindness?* Once students have a clear sense of the importance of respect, brainstorm ways in which people can show respect to one another. Give each student a piece of construction paper to trace their hand and then have them cut out their hand outline. On the hand, have them write one thing they can commit to doing to demonstrate respect for others in their school. Collect the "hands" and place them like leaves on a tree in a prominent location in the school as a reminder of everyone's commitment to respect one another.

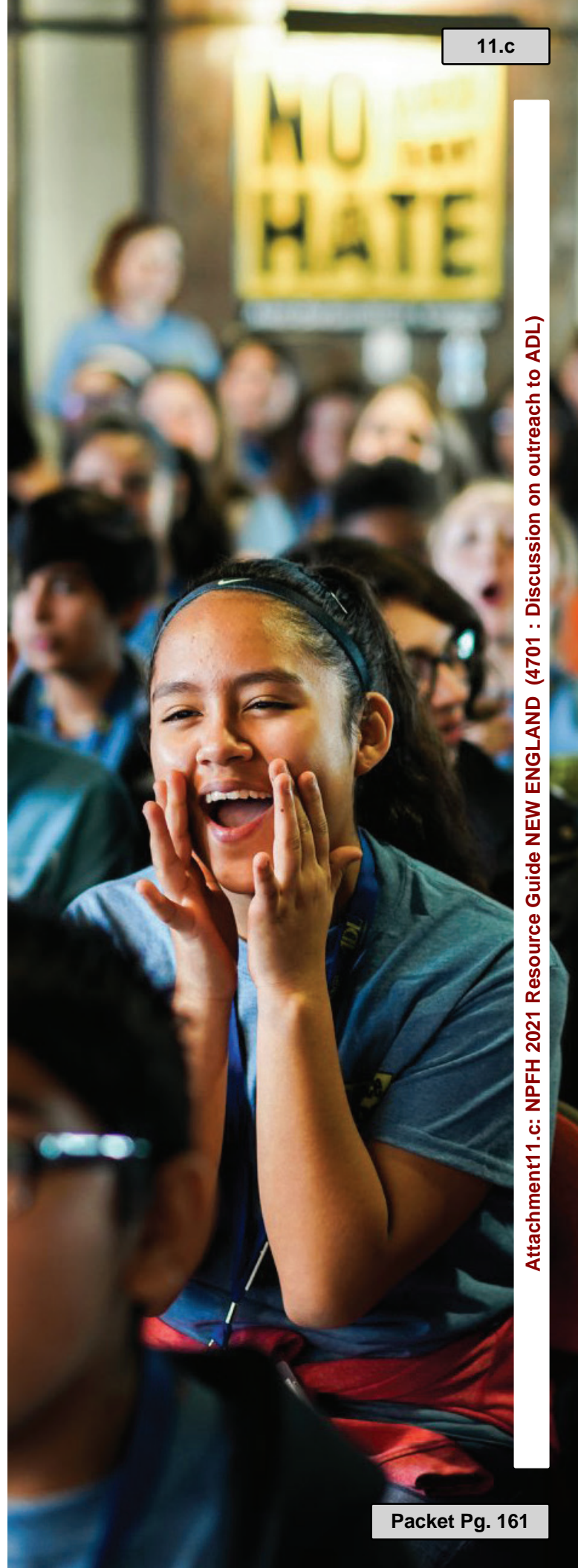
#THATSNOTFUNNY

Grade level: Middle School/High School

Lead a discussion about the topic of biased or offensive "jokes" using the ADL lesson below. Allow students an opportunity to explore the differences between teasing and offensive jokes/slurs and the impact of those slurs on individuals and the school's climate. As a follow-up to the conversation, ask students to come up with hashtags that they can use to challenge biased comments online and in person.

Supporting ADL Resource/Lesson Plan:

www.adl.org/education/educator-resources/lesson-plans/slurs-offensive-jokes-and-how-to-respond





INTENTIONAL ACTS OF RESPECT

Grade level: Middle School/High School

Respect can mean many things to many people; the Oxford Dictionary defines it as “the consideration for the feelings, wishes, rights or traditions of others.” Lead a discussion around the topic of respect. *What is it? What does it look like? What does it feel like?* Follow this discussion with an opportunity for students to rate how respectful their school is by standing at a point along an imaginary continuum between the words “Disrespectful” and “Respectful.” Have students then share their experiences and explain why they chose to stand where they did. Continue the conversation by asking students to brainstorm ways that people can show respect at their school. As a follow-up, provide notecards to each student and explain that for one week they will have an opportunity to recognize students or faculty members for committing Intentional Acts of Respect by recording the “Who, What, Where, When & How” of the respectful action on a notecard and dropping it in one of the designated boxes throughout the school. Read some of the notecards during morning announcements and post them on a featured wall for all to see.

Social Justice

MAKING THE INVISIBLE VISIBLE

Grade level: High School

Using the lesson below, lead a discussion about the ways in which LGBTQ people, events and issues have been less visible or made invisible in mainstream accounts of history. Explore the impact of invisibility on people and how different groups have been historically marginalized in society. Then, engage students in a discussion about people who may feel invisible in their school. Be sure to focus on general identity characteristics (e.g., sexual orientation, immigration status, gender identity, etc.) rather than specific individuals. Based on this discussion, ask students to sign up to be interviewed if they feel like an aspect of their identity needs more visibility. Help students create interview questions. Decide

how the interviews will be recorded (e.g., audio, video, etc.) and compile the completed interviews into your school's own StoryCorps library.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/unheard-voices-stories-of-lgbt-history

SHORT FILMS ABOUT IDENTITY, DIVERSITY, BIAS AND SOCIAL JUSTICE

Grade level: All Grade Levels

Use these short films (10 minutes or less) to engage the whole school in conversations about identity, diversity, bias and social justice. Select one or more of the films and view them in class, as a whole school or individually if in remote learning situations. After watching, ask students the following questions (and add more to be more specific) including: *What were your thoughts and feelings while watching the film? What is the message of the film? How did the film challenge your thinking? What did you learn about identity, bias, diversity or social justice?* You can also engage students in one of these follow up activities: have them write a reflection on the film, make a video recording with their thoughts and reflections, create their own short film on a related topic, or create comic strips based on memorable or impactful scenes. Another idea is to have a schoolwide mini-films festival and watch several films and then compare and contrast them.

Suggested films: *Float, In a Heartbeat, The Present, Wind, Hair Love, Have You Ever Had a Lunchbox Moment?, Rising* (Ad Council), *Love Has No Labels: Skeletons, Different and Burger King Bullying Jr.*

“WALK AGAINST HATE” SOCIAL ACTION CAMPAIGN

Grade level: Middle School/High School

In anticipation of ADL's Walk Against Hate on October 10th, 2021, choose an issue that is important to your school community that will be the focus of your social action campaign. Prior to the Walk, create some discussion questions around that issue to discuss and raise awareness about the issue in every class. Ask students to volunteer to create a short video about how to speak up against this issue and showcase it to your school as a way to lead up to the Walk Against Hate. Gather a group of students to join the Walk either virtually or locally in-person. Be sure to share the social action video online during the Walk using #WalkAgainstHate. Tune into www.adl.org/events as the date gets closer for more information.

Virtual Activities

ONE BOOK: ONE SCHOOL (VIRTUAL ADAPTATION)

Grade level: All Grade Levels

Choose a book from ADL's Books Matter library to read as a whole school. If you are an elementary school reading a picture book, teachers can read to students directly via video. Once students have read the book, engage in small group discussions about the book's themes. Ask questions of students about the identity, diversity, bias and bullying themes the book addresses. Utilize the book discussion guide to engage in a follow-up action. This can be creating a piece of art to be shared, or a short written response, or even a comparison to another book.

Supporting ADL Resource/Lesson Plan: www.adl.org/one-book-one-school

JUST LIKE ME (VIRTUAL ADAPTATION)

Grade level: All Grade Levels

Representation means different things to different people. On a video call, walk students through the meaning of representation, and ask them to think about their own identities. How have people with their identities been represented in the media (games, TV shows, movies, apps, books, toys, etc.) they participate in? Ask them to think of a character they love who represents them in some capacity and share why that representation matters to them. For younger grades, this can be as simple as sharing a picture of a character who represents them in some capacity with one word about why. For older students, a paragraph explaining why that character represents them could be hosted in a social media collage or in a school group chat.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/on-screen-diversity-why-visibility-in-media-matters

MANY FAMILIES (VIRTUAL ADAPTATION)

Grade level: Elementary School

On a video call, talk to students about the different types of families. Ask them to reflect on who is in their family or other families they know. What does a family look like? What are some common characteristics of families (they may live together, they love each other, they help each other, they share a home and resources)? Ask a couple of volunteers to share their reflections. Consider that families can have all kinds of races, genders, ages, parents (i.e., same sex, adoptive or foster parents) and structures. Explain that in your school, there is a lot of diversity in types of family. Emphasize that all types of family are awesome and valid. Ask students to draw a picture of what their family looks like and invite volunteers to share on the call or in a shared space. Ask: What makes your family unique?

“I AM ...” (VIRTUAL ADAPTATION)

Grade level: Elementary School

Over video chat, lead a discussion in small groups with students about similarities and differences between people. Talk about the importance of accepting and respecting people’s differences. Give the students a specific time to upload a drawing of themselves that shows aspects of their identity (e.g., physical traits, identity groups to which they belong, talents, hobbies, etc.). All of the self-portraits can then be collected and put together to create a PowerPoint, video or page to be shared with the school and community.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/who-am-i-identity-poems

WHEN I GROW UP (VIRTUAL ADAPTATION)

Grade level: Elementary School

Over video chat, lead a discussion about stereotypes using ADL’s lesson “Mo’Ne Davis and Gender Stereotypes” lesson plan (link below). As an extension to the lesson, ask students to think about ways in which stereotypes impact how people treat each other in their school. *Are kids of different genders treated differently? Are students treated differently on the basis of race? If so, how are they treated differently and why do you think that is?* Ask students to share a time that they were discouraged from doing something

because of an aspect of their identity and the stereotypes people have of that identity group. Finish the activity by asking each student to draw a picture of possible jobs/professions they're interested in pursuing when they grow up. Encourage them to think big, even if it's something that society says, due to stereotypes, they shouldn't be.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/mone-davis-and-gender-stereotypes

“HUMANS OF ...” INSTAGRAM CAMPAIGN (VIRTUAL ADAPTATION)

Grade level: Middle School/High School

This activity is inspired by the “Humans of New York” campaign. Over video chat, lead a discussion in small groups with students about different aspects of identity (e.g., race, religion, language, gender/ gender identity, sexual orientation, etc.). Following this discussion, create a student-led team. Students on the team are responsible for doing video or text interviews with other students to interview them about aspects of their identities. They will then post one of those interviews daily, with an accompanying picture, on your school's Instagram (or other social media your school prefers) page. Interviewers should encourage people to share an aspect of their identity that makes them unique and proud and can also include the variety of languages represented at your school, where appropriate. Be sure to get permission from students to post and monitor the account to respond to any negative or biased feedback.

LISTENING JOURNAL (VIRTUAL ADAPTATION)

Grade level: Middle School/High School

Have students keep a listening journal for one week. As they listen to the people in their lives and to messages in the media (including social media), have them record examples of stereotypes, bias and discrimination that they experience, see and hear about throughout the week. Over video chat, lead a discussion about their observations and the impact on their school (or online or community) culture. In response, have students create an Ally Board on your distance learning platform to share allyship strategies for students and staff to challenge the biased attitudes and behaviors that impact their school.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/slurs-offensive-jokes-and-how-to-respond

INTENTIONAL ACTS OF RESPECT (VIRTUAL ADAPTATION)

Grade level: Middle School/High School

Respect can mean many things to many people; the Oxford Dictionary defines it as “the consideration for the feelings, wishes, rights or traditions of others.” Over video chat, lead a discussion around the topic of respect. *What is it? What does it look like? What does it feel like?* Follow this discussion with an opportunity for students to rate how respectful their school is by dragging a slider on a digital platform like Google Forms between “Disrespectful” and “Respectful.” Share the results of the informal survey and ask students to share their experiences and explain why they chose the point on the meter that they did. Continue the conversation by asking students to brainstorm ways that people can show respect at their school. As a follow-up, invite students to recognize Intentional Acts of Respect by recording respectful acts they have seen at school (without identifying individual students or staff) and submitting via email, online

form or survey. Shout out some of the submissions on school social media. Monitor the comments for respectful interaction.

MAKING THE INVISIBLE VISIBLE (VIRTUAL ADAPTATION)

Grade level: High School

Using the lesson below, lead a discussion on video chat about the ways in which LGBTQ people, events, accomplishments and issues have been less visible or made invisible in mainstream accounts of history. Explore the impact of invisibility on people and how different groups have been historically marginalized in society. Then, engage students in a discussion about people who may feel invisible in their school. Be sure to focus on general identity characteristics (e.g., sexual orientation, immigration status, gender identity, etc.) rather than specific individuals. Based on this discussion, ask students to sign up to be interviewed if they feel like an aspect of their identity needs more visibility. Help students create interview questions. Decide how the interviews will be recorded (e.g., audio, video, etc.) and compile the completed interviews into your school's own StoryCorps library.

Supporting ADL Resource/Lesson Plan: www.adl.org/education/educator-resources/lesson-plans/unheard-voices-stories-of-lgbt-history

For access to more activities, visit:

<https://www.adl.org/no-place-for-hate-activity-library>.

Policy Expectations

Creating a Safe, Inclusive and Equitable School Climate Policy

Although the No Place for Hate® pledge serves as a declaration of each school member's commitment to fostering an inclusive and equitable school climate, it is important that the school have a clear policy that defines what an equitable school climate is and what the expectations are to help reach that goal. Below is a sample policy that will guide you in developing a policy that is specific to the needs of your school community. Feel free to modify any part of this sample.

Sample Positive School Climate Policy

Research indicates that a safe, inclusive and equitable school climate translates into safer, more engaging and supportive school communities. How students and staff feel about a school's culture impacts other key indicators of success, including academic achievement and teacher retention.

School climate refers to how students and staff feel about the social and environmental factors that make up their school culture (e.g., rules, policies, teaching, pedagogy, etc.). [Name of School] commits to developing and maintaining a respectful, inclusive and equitable school climate, that is reflected in classrooms and common areas, free from bias and bullying behavior; clearly stated expectations about each individual's responsibility in challenging bias and bullying; and curriculum and classroom resources that reflect the diversity of the student population and the society in which we live. Without this, students will not feel safe, welcomed, challenged and supported.

All members of the school community, including students, staff, administrators and family members, are expected to serve as role models by demonstrating ally behavior, implementing culturally responsive pedagogy, respecting other students and staff, and challenging bias.

[Name of School] will not accept any form of harassment, discrimination, bullying or intimidation that would interfere with a respectful, inclusive and equitable school climate. If such an incident does take place, the school will address the issue with the individual(s) and will use the moment to educate the school community.



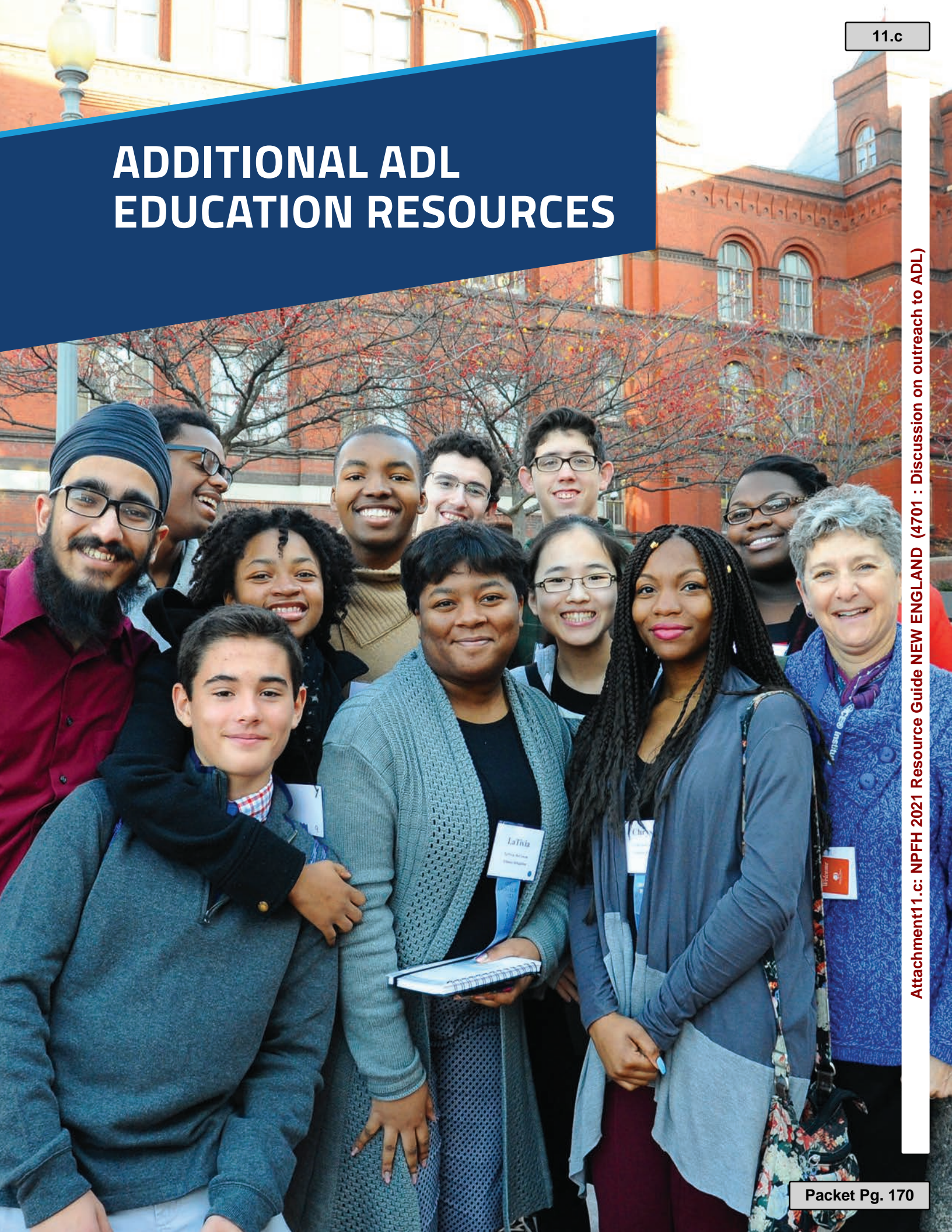
Self-Assessment Surveys Part I. Assessing Yourself

How effective are you school in promoting an anti-bias educational environment?	I haven't thought about this.	I need to work on this.	I do this well.
1. Have you recently read any books or articles, or watched any movies or documentaries in order to increase your understanding of the particular hopes, needs and concerns of students and families from the different cultures of people that make up your school community and beyond?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Have you participated in professional development opportunities to enhance your understanding of the complex characteristics of racial, ethnic, and other identity groups in the U.S.?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Do you try to listen with an open mind to all students and colleagues, even when you don't understand their perspectives or agree with what they're saying?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Have you taken specific actions to dispel misconceptions, stereotypes or prejudices that members of one group have about members of another group at your school?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Do you strive to avoid actions that might be offensive to members of other groups?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Do you discourage patterns of informal or unconscious discrimination, segregation or exclusion of members of particular groups from school clubs, communities and other school activities?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Do the curricular content and wall displays in your classroom reflect the experiences and perspectives of the identity groups that make up the school, surrounding community and our society?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Have you evaluated classroom materials and textbooks to assess them for bias stereotypes and evaluate that they provide equitable and appropriate treatment of all groups?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Do you use classroom methods such as cooperative learning, role-playing and small group discussions to meet the needs of students' different learning styles?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Do students have opportunities to engage in problem-solving groups that address real issues with immediate relevance to their lives?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Do you use a range of strategies to assess student learning in addition to traditional testing methods?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Self-Assessment Surveys Part II. Assessing Your School

How effective is your school in promoting an anti-bias educational environment?	We haven't thought about this.	We need to work on this.	We do this well.
1. Does the school's mission statement communicate values of respect, equity and inclusion?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Do students typically interact with one another in positive, respectful ways?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Do the school's symbols, signs, mascots and insignias reflect diversity and inclusion?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Do celebrations, festivals and special events reflect a variety of cultural groups and holidays?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Is the school staff (administrative, instructional, counseling and supportive) representative of the diversity of the school, community and society?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Are staff or volunteers available who are fluent in the languages of families in the school community?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Do students, families and staff have input into important decisions made in the life of the school?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Has the school community collaboratively developed written policies and procedures to address bias, bullying and harassment?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Are the consequences associated with bias, harassment and bullying policy violations enforced equitably and consistently?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Do the instructional materials used in the classroom and available in the school library, including textbooks, literature, supplementary books and multimedia resources, reflect the experiences and perspectives of people of diverse backgrounds?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Are equitable opportunities for participation in extra- and co-curricular activities made available to students of all backgrounds and identities?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
12. Do faculty and staff have opportunities for systematic, comprehensive and continuing professional development designed to increase cultural understanding and promote student safety?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
13. Does the school conduct ongoing evaluations of the goals, methods and instructional materials used in teaching to ensure they reflect the histories, contributions and perspectives of diverse groups?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

ADDITIONAL ADL EDUCATION RESOURCES



Expanding Your Impact

ADL Education Training Programs

ADL Education provides high-quality educational programs and curriculum resources to assist school communities in combating bias, bullying and bigotry. Please contact noplaceforhate@adl.org to learn more about how the following training programs for educators, administrators, students and family members can supplement your No Place for Hate® goals.

No Place for Hate Committee Training

This training provides an opportunity for committee members to discuss and explore issues of name-calling, bullying and bias in their school and to develop a plan to address those issues through the No Place for Hate activities that will take place throughout the year.

Anti-Bias Training

These programs provide workshops that facilitate the exploration of personal identity in students, educators and/or family members and assist with understanding language and culture, examining bias and developing plans to challenge bias in an effort to improve the overall climate of their school.

Anti-Bias Curriculum Based Training

This training, offered at three different levels (elementary, middle and high school), provides an opportunity for educators to explore anti-bias education and how to implement the concept in the classroom. The training includes curriculum guides that provide standards-aligned lesson plans that follow a scope and sequence throughout the school year.

Bullying/Cyberbullying Prevention Training

These bullying/cyberbullying prevention programs for students, educators and family members provide innovative skills and strategies to help schools prevent and intervene against name-calling, bullying and cyberbullying as part of a broader strategy to create safe and equitable schools for all students.

Peer Training/Peer Leadership

This nationally recognized program equips students to become leaders and agents of change in their schools and communities by facilitating difficult conversations about bias, discrimination and bullying with their peers.

Anti-Bias Curriculum

<https://www.adl.org/education/resources/tools-and-strategies/anti-bias-curriculum-guides>

ADL's anti-bias curriculum guides for educators provide standards-aligned sequential lessons to help students in grades K–12 build a strong foundation for analyzing and confronting bias. The curriculum guides are designed to help educators and students explore ways to ensure that the principles of respect for diversity, freedom and equity become realities.

ADL Education's Incident Response

If your school experiences an incident of bias, hatred or injustice, please use the following link to complete the Incident Response Form. We will do our best to investigate your situation and respond to you quickly. <https://www.adl.org/reportincident>

To find additional information and download Responding to Bias Incidents in Middle and High Schools: Resources and Best Practices for School Administrators & Educators, visit <https://www.adl.org/education/resources/tools-and-strategies/a-guide-for-responding-to-school-based-bias-incidents>

When an incident like this takes place, we are available to help you address the issue and provide ongoing education and assistance to help prevent future incidents. On the following page is a structure and approach to assist your preparation in responding to bias incidents in their immediate aftermath and to promote inclusive school climates with education.

Responding to Incidents of Hate and Bias

Best Practices for School Administrators

Over time, we have seen alarming images, hateful language and bias incidents in K–12 schools. The most effective responses to bias-motivated incidents are holistic and incorporate prevention, interventions and consequences and long-term educational strategies. Below are approaches to assist you in being prepared to respond to bias incidents in their immediate aftermath and to promote inclusive school climates with education.

PREPARE

Be ready for incidents so that you can act quickly when something happens.

- Update policies on bullying and harassment and other in-person and online violations. Make sure policies explicitly prohibit incidents motivated by bias, are inclusive of all students and clearly outline consequences that are enforced universally.
- Ensure that school discipline policies limit reliance on exclusion strategies and that alternatives, such as positive behavioral interventions and supports, are tried first.
- Regularly review policies with all members of the school community and publicize them in various ways (e.g., on notice boards, in electronic and hard copy newsletters) and in families' home languages.

- Develop a data collection protocol consistent with local, state and federal standards so that the prevalence and types of incidents can be tracked, and patterns can be analyzed and addressed.
- Build relationships with community organizations and partners, law enforcement, media and other relevant stakeholders. These relationships can enhance your ability to respond rapidly and comprehensively to an incident.

ENCOURAGE REPORTING

Young people are very often reluctant to tell adults about incidents because they believe it won't help and may make things worse.

- Establish safe and confidential reporting mechanisms and clear procedures for investigation and response. Ensure that those who report incidents don't experience retaliation or unnecessary interaction with law enforcement by enacting policies that address protection for those who report. Be aware of possible false reports and consider what to do if that occurs.
- Make students aware of these systems and encourage them to tell a trusted adult when they experience, witness or hear about an incident.
- With adults, discuss best practices for being more approachable. Take reported issues seriously, invest the time to listen before engaging in problem solving, maintain confidentiality when appropriate and model responsible in-person and online behavior.
- Reaffirm your school as a "sanctuary" or "safe zone" school by reinforcing existing laws, policies and constitutional rights that protect immigrant students from federal immigration enforcement activity at school. Ensuring safety and inclusion for vulnerable students will encourage reporting.

ACT QUICKLY AND RESPOND

Every reported incident should be responded to in a serious manner that reassures the school community and conveys a message that the behavior is unacceptable.

- Utilize a standardized bias-incident response form to guide and document information-gathering after the occurrence of an incident.
- Immediately upon learning of the incident, preserve photos, screenshots, etc. Interview all parties separately and collect written accounts as soon as possible.
- Gather facts with an eye towards the bigger picture at the school. Ask students whether other similar incidents have happened and listen to concerns and feedback about school climate.
- Clarify what the role and duties of school resource officers (SROs) and police should and should not be in the process. Contact law enforcement as necessary.
- Ensure the safety of all students and determine disciplinary response, if appropriate.
- On a need-to-know basis, determine the extent to which mental health and social service providers and other victim resources should be consulted.

COMMUNICATE

Ensure that all members of the school community and stakeholders understand reporting procedures. When an incident occurs, keep the school community informed.

- Communicate with all members of the school community and tailor your message depending on the audience (i.e., students, staff, families, and the wider community). Initial communication

should (1) describe the nature of the incident (e.g., swastika on the bathroom wall); (2) denounce the act and affirm the inclusive values of your school; (3) announce an immediate investigation of the matter, when appropriate; and (4) share resources for students and families impacted by the incident, including social services and plans for an educational response.

- Send regular updates and plans for short-term and long-term action to the various stakeholders.
- Ensure the protection of students' privacy in any communications about the incident.

EDUCATE

In a regular and ongoing way, teach students about bias, its harmful effects and how to challenge it. Don't wait for an incident to occur to talk about these important issues.

- Turn bias-motivated incidents into “teachable moments,” offer the opportunity to talk about bias and discrimination, and provide opportunities for students to take action.
- Provide opportunities for all members of the school community to discuss and process their thoughts and feelings around the incident.
- Educate all students, including aggressors or perpetrators, who were involved in the incident. Sometimes young people who engage in bias-motivated behavior do not understand the meaning or impact of their actions on the larger school community. Educators, counselors and administrators should coordinate disciplinary, behavioral and educational interventions.
- Provide professional development for school personnel on how to lead discussions on the nature and impact of bias with students and families. Anti-bias education is a long-term process and preventing bias requires an ongoing commitment from all stakeholders in the school community, including the school's administrators. Integrate anti-bias and bullying prevention strategies into the school curriculum, school climate programs and family engagement.
- Support efforts to provide training for school resource officers on implicit bias and strategies that meet varying needs of officers working with youth.

ADL's Online Resources

The following resources can be found at www.adl.org/education.

11 Ways Schools Can Help Students Feel Safe in Challenging Times

Prevention, intervention and educational strategies that help to promote inclusive school environments where young people can learn and thrive.

www.adl.org/education/resources/tools-and-strategies/11-ways-schools-can-help-students-feel-safe-in-challenging

Anti-Bias Tools and Strategies

Tips, tools, strategies and discussion guides for K–12 educators and students in order to promote anti-bias and culturally responsive learning environments.

www.adl.org/education/resources/tools-and-strategies/anti-bias-tools-strategies

Bullying and Cyberbullying Prevention Resources

Collection of expert advice about bullying and cyberbullying for educators, administrators, students, parents and families.

www.adl.org/education/resources/tools-and-strategies/bullying-and-cyberbullying-prevention-strategies

Books Matter (Book of the Month)

A collection of 800+ children's and young adult literature on bias, bullying, diversity and social justice. Each month, our featured Book of the Month includes two discussion guides: one for teachers and one for families.

www.adl.org/books-matter

Calendar of Observances

A tool to increase awareness and sensitivity about religious holidays and observances as well as ethnic and cultural festivities that may affect students, colleagues and neighbors in your community.

www.adl.org/education/resources/tools-and-strategies/calendar-of-observances

Empowering Young People in the Aftermath of Hate

A discussion guide for educators and families that provides the tools necessary to help young people engage in conversations and actions in the aftermath of hate-motivated violence, extremism or other incidents in their community or society.

www.adl.org/education/resources/tools-and-strategies/empowering-young-people-in-the-aftermath-of-hate-en

Lesson Plans

A collection of K–12 timely lesson plans and multi-grade units that promote critical thinking and assist educators in teaching current events topics through a lens of anti-bias, diversity, and social justice.

www.adl.org/lesson-plans

Rosalind's Classroom Conversations

Written by best-selling author and bullying prevention specialist Rosalind Wiseman, these essays explore bullying, current events and the social and emotional development of children.

www.adl.org/rosalinds-classroom-conversations

Table Talk: Family Conversations about Current Events

A resource that provides parents and families with the tools they need to engage in conversations about important news stories and other timely discussions about societal and world events.

www.adl.org/table-talk

What Do Safe, Respectful and Inclusive Virtual Classrooms Look Like?

A guide for fostering safe, respectful and inclusive classrooms in virtual and hybrid learning environments.

www.adl.org/education/resources/tools-and-strategies/what-do-safe-respectful-and-inclusive-virtual-classrooms



You can also follow us on:



www.facebook.com/anti.defamation.league



twitter.com/ADL



www.instagram.com/ADL_Education

Definitions Related to Bias and Bullying

Elementary School

ALLYSHIP

An action where someone helps or stands up for someone who is being bullied or who is the target of bias.

BULLYING

When a person or a group behaves in ways—on purpose and repeatedly—that make someone feel hurt, afraid or embarrassed.

BYSTANDING

When a person or a group sees bullying or prejudice happen and does not say or do anything.

CULTURE

The patterns of daily life that can be seen in language, arts, customs, holiday celebrations, food, religion, beliefs/ values, music, clothing and more that a group of people share.

DISCRIMINATION

Unfair treatment of one person or group of people because of the person's or group's identity (e.g., race, gender, ability, religion, culture, etc.). Discrimination is an action that can come from prejudice.

INEQUALITY

An unfair situation when some people have more rights or better opportunities than other people.

INJUSTICE

A situation in which the rights of a person or a group of people are ignored, disrespected or discriminated against.

MULTICULTURAL

Including many different cultures.

NAME-CALLING

Using words to hurt or to be mean to someone or a group.

NONVERBAL COMMUNICATION

Aspects of communication (such as gestures and facial expressions) that do not involve speaking; can also include nonverbal aspects of speech (tone and volume of voice, etc.).

PREJUDICE

Judging or having an idea about someone or a group of people before you actually know them. Prejudice is often directed toward people in a certain identity group (e.g., race, religion, gender, etc.).

STEREOTYPE

The false idea that all members of a group are the same and that they think and behave in the same way.

TEASING

Laughing at and putting someone down in a way that is either friendly and playful, or mean and unkind.

Middle & High School

PART I. GENERAL TERMS

Find a full list of terms at ADL's Education Glossary Terms:

www.adl.org/education/resources/glossary-terms/education-glossary-terms

ANTI-BIAS

An active commitment to challenging bias in oneself, others and institutions.

BIAS

An inclination or preference either for or against an individual or group that interferes with impartial judgment.

BIGOTRY

An unreasonable or irrational attachment to negative stereotypes and prejudices of individuals or groups belonging to one or more social identities.

CULTURE

The patterns of daily life learned consciously and unconsciously by a group of people. These patterns can be seen in language, governing practices, arts, customs, holiday celebrations, food, religion, relationships, family roles, clothing, etc.

DISCRIMINATION

The denial of justice, resources and fair treatment of individuals and groups (often based on social identity) through employment, education, housing, banking, political rights, etc.

DIVERSITY

Means different or varied. The population of the United States is made up of people belonging to diverse groups characterized by culture, race, ethnicity, nationality, gender, sexual orientation, ability, etc.

MULTICULTURAL

Means many or multiple cultures. The United States is multicultural because its population consists of people from many different cultures.

PREJUDICE

A premature judgment or belief formed about a person, group or concept before gaining sufficient knowledge or by selectively disregarding facts.

SCAPEGOATING

Blaming an individual or group for something based on that person's or group's identity when, the person or group is not responsible. Bias, prejudicial thinking and discriminatory acts can lead to scapegoating.

STEREOTYPE

An oversimplified generalization about a person or group of people without regard for individual differences. Even seemingly positive stereotypes that link a person or group to a specific positive trait can have negative consequences.

SYSTEMIC RACISM

A combination of systems, institutions and factors that advantage white people, and for people of color, cause widespread harm and disadvantages in access and opportunity. One person or even one group of people did not create systemic racism, rather it: (1) is grounded in the history of our laws and institutions which were created on a foundation of white supremacy; (2) exists in the institutions and policies that advantage white people and disadvantage people of color; and (3) takes places in interpersonal communication and behavior (e.g., slurs, bullying, offensive language) that maintains and supports systemic inequities and systemic racism.

PART II. SYSTEMS OF BIAS

The specific, pervasive systems of oppression and marginalization described below are upheld by institutionalized, cultural and historical ideologies and discrimination. These systems exist simultaneously, compounding the harm to individuals with multiple marginalized identities. Individual acts of prejudice and discrimination are informed by and perpetuate these systems, which exist regardless of individual prejudices and interpersonal acts of bias.

ABLEISM

The marginalization and/or oppression of people who have disabilities, including temporary, developmental, physical, psychiatric and/or intellectual disabilities.

AGEISM

The marginalization and/or oppression of older people based on the belief that older people are inferior, incapable or irrelevant. Ageism also describes the marginalization and/or oppression of people who are too young to have social independence.

ANTI-IMMIGRANT BIAS

The marginalization and/or oppression of people who are of immigrant origin, transnational or outside the dominant national identity or culture.

Other related terms include **xenophobia** to describe a fear of anyone or anything that is perceived to be foreign or strange.

ANTI-MUSLIM BIAS

The marginalization and/or oppression of people who are Muslim, based on the belief in stereotypes and myths about Muslim people, Islam and countries with predominantly Muslim populations.

ANTISEMITISM

The marginalization and/or oppression of people who are Jewish, based on the belief in stereotypes and myths about Jewish people, Judaism and Israel.

ANTI-TRANS BIAS

The marginalization and/or oppression of people who are transgender and/or non-binary (identifying as neither a man nor a woman), based on the belief that cisgender (gender identity that corresponds with the sex one was assigned at birth) is the norm.

CLASSISM

The marginalization and/or oppression of people who are from low-income or working-class households, based on a social hierarchy in which people are ranked according to socioeconomic status.

HETEROSEXISM

The marginalization and/or oppression of people who are lesbian, gay, bisexual, queer and/or asexual, based on the belief that heterosexuality is the norm.

RACISM

The marginalization and/or oppression of people of color, based on a socially constructed racial hierarchy that privileges white people.

RELIGIOUS BIGOTRY

The marginalization and/or oppression of people who belong to one or more religious groups or no religious group, based on the belief in a correct or sanctioned faith system.

SEXISM

The marginalization and/or oppression of women, based on the belief in a natural order based on sex that privileges men.

WEIGHTISM

The marginalization and/or oppression of people who are larger than the socially constructed norm for body size.

PART III. Terms Specific to Name-Calling and Bullying

Bullying is a behavior. Because of this, ADL encourages educators to use language that describes students' behavior rather than the student themselves (e.g., "the student who bullied" rather than "the bully;" "the student who was targeted" rather than "the target" or "the victim"). By focusing on behavior, we avoid sending the message that a student's behavior cannot change, and we acknowledge that one person can exhibit multiple behaviors in different bullying situations. Below are the behaviors individuals may exhibit in incidents of bullying.

ALLYSHIP

A behavior where someone speaks out on behalf of someone else or takes actions that are supportive of someone who is targeted by bias or bullying, either themselves or someone else.

BULLYING

Intentional repeated actions or threats of action that are designed to cause fear, distress or harm, directed toward a person by one or more people who have (or are perceived to have) more power or status than their target. Behavior is not considered bullying if it occurs once with no intention of gaining power (e.g., bumping into someone, telling a joke once, not playing with someone, etc.); still, it is important that all mean behavior be addressed in a timely and appropriate way.

BYSTANDING

Many students observe bullying behavior without supporting or confronting it out of fear of being bullied themselves or because they do not know how to support the one who is being bullied.

CYBERBULLYING

The intentional and repeated mistreatment of others through the use of technology such as computers, cell phones and other electronic devices.

NAME-CALLING

The use of language to defame, demean or degrade individuals or groups.

Creating an Anti-Bias Learning Environment

Talking with Students about Diversity and Bias

It is important for teachers to think about how they can most effectively raise the complex issues of hate, bias, scapegoating and exclusion with their students. To prepare to raise issues of diversity and bias in the classroom, teachers should attempt to integrate the following practices into their classroom curricula.

SELF-EXPLORATION

Provide students with opportunities for the examination of personal cultural biases and assumptions.

COMPREHENSIVE INTEGRATION

Integrate culturally diverse information/perspectives into all aspects of teaching.

TIME AND MATURATION

Allow time for a process to develop. Introduce less complex topics at first and allow the time it takes to establish trust.

ACCEPTING ENVIRONMENT

Establish an environment that allows for mistakes. Assume good will and make that assumption a common practice in the classroom.

INTERVENTION

Be prepared to respond to intentional acts of bias. Silence in the face of injustice conveys the impression that prejudicial behavior is condoned or not worthy of attention.

LIFELONG LEARNING

Keep abreast of current anti-bias education issues and discuss them with students.

DISCOVERY LEARNING

Avoid “preaching” to students about how they should behave. Provide opportunities for students to resolve conflicts, solve problems, work in diverse teams and think critically about information.

LIFE EXPERIENCES

Provide opportunities for students to share life experiences; choose literature that will help students develop empathy.

RESOURCES REVIEW

Review materials so that classroom displays and bulletin boards are inclusive of all people.

HOME-SCHOOL-COMMUNITY CONNECTION

Involve parents, other family members and other community members in the learning process.

EXAMINE THE CLASSROOM ENVIRONMENT

What is present and absent in the school classroom provides children with important information about who and what is important.

ADL New England

Phil Fogelman
Education Director

Danika Manso-Brown
Education Director

Robert Trestan
Regional Director

Frederic Bloch
Interim Northeast Division Vice President
Senior Vice President, Growth

Joseph Berman
Board Chair

Kathy Hershfield, Melissa Kaplowitch, Matt King
Education Committee Chairs

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SUDBURY SELECT BOARD

Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

12: Approve FY22 contracts

REQUESTOR SECTION

Date of request:

Requestor: Town Counsel office

Formal Title: Discussion and vote whether to approve award of contracts by the Town Manager commencing 7/1/21 through 9/30/21, including, but not limited to, DPW, Senior Center, Facilities and Planning contracts, provided a listing is prepared and submitted to the Select Board for all contracts requiring Board advance approval which are executed by the Town Manager during said period.

Recommendations/Suggested Motion/Vote: Discussion and vote whether to approve award of contracts by the Town Manager commencing 7/1/21 through 9/30/21, including, but not limited to, DPW, Senior Center, Facilities and Planning contracts, provided a listing is prepared and submitted to the Select Board for all contracts requiring Board advance approval which are executed by the Town Manager during said period.

Background Information:

Financial impact expected:n/a

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

Calendar Year 2020 Contracts (over \$25,000)

DATE	NAME OF CONTRACT	AMOUNT	OVER \$25,000?	RENEWAL?	Services Provided	BOS scheduled agenda (vote)	Notes
7/1/2020	Agreement: DPW (D. Nason) and Mayer Tree Service Inc	invoices to be submitted monthly. Per Elaine over \$25k	yes		Tree & Stump Removal & Disposal	on DPW listing, date of vote, 4/28/20	
7/2/2020	DPW (D. Nason) and R. Bates & Sons, Inc.	\$242,050.00	yes		Concord Rd. Culvert repairs	6/17/2020 BOS vote	
7/16/2020	Agreement: Goodnow Library (E. Greene) and Minuteman Library Network	\$56,427.00	yes		Goodnow Library Minuteman Agreement	voted 7/14/20	
7/23/2020	Agreement: DPW (D Nason) and Lazaro Paving Corp	\$124,340.00	yes		Parking Lot Improvements Sudbury Fire Dept	voted 7/14/20	
7/30/2020	Agreement: Facilities (B. Barletta) and M & M Contract Cleaning Inc	\$2,112.50/month	yes	yes	Cleaning for Town Hall, Flynn, DPW & Highway Buildings	2018 vote & 3 yr contract for Flynn & Town Hall; 2019 DPW & Highway 3 yr.	
8/20/2020	Agreement. DPW (D Nason) and Capital Environmental, LLC	not to exceed \$80,000*** see Notes	yes		DPW materials management - removal	summer listing	Amendment #1 dated 9/8/20, sum not to exceed \$83, 824.92
8/25/2020	Agreement: Facilities (B. Barletta) and Dynamic Janitorial Cleaning Inc.	\$ 2700/month	yes		Fairbank building cleaning	n/a, voted 1st yr continuing	
9/24/2020	Agreement: DPW (D Nason) and Woodard & Curran	not to exceed \$117,300	yes		Stormwater Consulting Services: MS4 Permit Year 3 requirements (EPA)	n/a, to be listed	
9/24/2020	Agreement: DPW (D Nason) and Woodard & Curran	not to exceed \$41,500	yes		Engineering Consulting Services: Old Framingham Road realignment & sidewalk extension	n/a, to be listed	
9/24/2020	Agreement: DPW (D Nason) and Woodard & Curran	not to exceed \$ 120,000	yes		Engineering Consulting Services: Town-wide drainage strategic drainage system improvements	n/a, to be listed, appropriated ATM 20/25	
9/24/2020	Agreement: DPW (D Nason) and Woodard & Curran	not to exceed \$ 77,000	yes		Engineering Consulting Services: Design services for installation of 2 security gates with closed-circuit cameras & parking area expansion at DPW facility	n/a, to be listed, budgeted-fuel island capital art.	
9/24/2020	Agreement: DPW (D Nason) and K-5 Corporation	not to exceed \$ 50,000	yes		DPW Traffic line painting & parking lots	on listing	
9/30/2020	Agreement: DPW (D Nason) and Woodard & Curran -Wayside Inn design	not to exceed \$125,000	yes		Wayside Inn design (permanent repairs) - assistance on call with design	listing through 9/30	Article 44, ATM 2020
9/30/2020	Agreement: DPW (D Nason) and Woodard & Curran - Consultant for design through permitting - strategic town-wide drainage	not to exceed \$120,000	yes		engineering design, regulatory permitting, public building and award services for strategic town-wide drainage system improvements	n/a, Town Mgr approval thru 9/30	ATM 2020, Article 25
9/30/2020	Agreement: DPW (D Nason) and Woodard & Curran - consulting services regarding re Old Framingham Rd.	not to exceed \$41,500	yes		Perform field investigation design & permitting for Old Framingham Rd. realignment and sidewalk extension (paid from walkway article fund)	n/a, Town Mgr approval thru 9/30	

Attachment 12.a: FY20 rpt for Elaine_July1 to Sept 30 Contracts over \$25k (4700) : Approve FY22

DATE	NAME OF CONTRACT	AMOUNT	OVER \$25,000?	RENEWAL?	Services Provided	BOS scheduled agenda (vote)	Notes
9/30/2020	Agreement: DPW (D Nason) and Woodard & Curran for Stormwater Consulting Services	not to exceed \$117,300	yes		Consultant for MS4 Permit Year 3 stormwater discharge compliance (annually budgeted under engineering contracting)	n/a, Town Mgr approval thru 9/30	
9/30/2020	Agreement: DPW (D Nason) and Woodard & Curran for Engineering Consulting Services	not to exceed \$77,000	yes		Consultant for design installation of 2 security gates w/cameras, and parking expansion in connection with fuel island installation	n/a Town Mgr approval thru 9/30	Fuel island ATM2018, Article 23



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

13: Newsletter discussion

REQUESTOR SECTION

Date of request:

Requestor: Board Member Dretler

Formal Title: Newsletter discussion and potential vote on desired way forward for the Newsletter.

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

14: Minutes review

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Review open session minutes of 6/15/21 and 6/23/21 and possibly vote to approve minutes.

Recommendations/Suggested Motion/Vote: Review open session minutes of 6/15/21 and 6/23/21 and possibly vote to approve minutes.

Background Information:

See attached drafts.

Financial impact expected:

Approximate agenda time requested: 30 minutes

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Select Board	Pending

07/13/2021 6:00 PM

SUDBURY SELECT BOARD

TUESDAY JUNE 15, 2021

SUDBURY TOWN HALL, 322 CONCORD ROAD

(Meeting can be viewed at www.sudburytv.org)

Present: Chair Jennifer Roberts, Vice-Chair Charles Russo, Select Board Member Daniel E. Carty, Select Board Member William Schineller, Select Board Member Janie Dretler, Town Manager Henry L. Hayes, Jr.

The statutory requirements as to notice having been complied with, the meeting was convened at 7:29 p.m., via Zoom telecommunication mode. The meeting was also in-person at Lower Town Hall.

Chair Roberts announced the recording of the meeting and other procedural aspects included in the meeting. She acknowledged that the Board had just adjourned in Executive Session.

Call to Order/Roll Call

Select Board Roll Call: Schineller-present, Carty-present, Russo-present, Dretler-present, Roberts-present. Board Member Carty confirmed he was participating remotely, and was traveling for business.

Opening remarks by Chair:

- First in-person meeting in over a year, and as of today, MA legislation will be extending remote meetings
- Public can participate in tonight's meeting either in person or by calling in
- Antisemitic incident at LSRHS two weeks ago; officials taking this matter seriously
- As a national holiday, Juneteenth is being recognized as the day in 1865 when the last of the slaves in Texas were freed
- Commission on Disability (COD) highlighted that the Home Bound COVID Vaccination Control program was in place; residents can call 833-983-0485, Monday through Friday, from 9:00 a.m. to 5:00 p.m.
- Diversity, Equity and Inclusion (DEI) Commission had its second meeting last week, now planning the work for the year
- FinCom's last meeting focused on minutes, liaison assignments, and results of Town Meeting

Reports from Town Manager:

- Great feedback from everyone regarding the recent Annual Town Meeting; thanked all who participated with special recognition to the new Town Moderator Cate Blake
- College student Joseph Sziabowski, Senior at Clark University, is involved in a shadow program with Town Manager

Reports from Select Board

Board Member Dretler:

- Recent Swastika incident LSRHS; urged the community to educate and be aware of antisemitic activities in Town – which is not acceptable

- Spoke of school introductory webinar titled “Building and Sustaining an anti-racist school Community”
- Social Justice Group and Sudbury Valley Trustees will be hosting a two and a half-mile walk at Memorial Forest to symbolize the two and a half years it took for all slaves in Texas to learn they were freed
- Pleased that virtual meetings will continue
- Spoke to Governor Baker on Friday and relayed the importance and benefit of the remote meeting mode

Vice-Chair Russo:

- Grateful for healthcare workers, first responders, and teachers who have been doing their jobs in person for some time
- Several organizations in Town planning Juneteenth celebrations
- Sudbury Art Association event took place this past weekend
- Sewataro Subcommittee members (he and Board Member Schineller) met last week, and will be updating the Board in July

Board Member Schineller:

- Mentioned significance of Juneteenth
- Sewataro Subcommittee Meeting (he and Vice-Chair Russo) contacted the Sewataro camp operator regarding public swimming opportunities going forward
- Spoke to Senator Eldridge regarding the Town’s housing target numbers, transportation, and other important topics
- Representative Carmine Gentile looking into the master rail division agreement to ensure there will be no delay in the construction of the BFRT

Board Member Carty:

- Indicated he would have been happy to be part of the in-person meeting tonight, but is away on business
- SPS extended the contract for Superintendent Crozier for an additional four years
- SPS Chair and Vice-Chair seats were appointed
- Loring Playground project has begun
- Congratulated LSRHS graduates

Citizens comments on items not on agenda

No comments presented

As the Licensing Authority for the Town of Sudbury, vote to approve a new Common Victualler License (Change of Ownership) for Sudbury Coffee Works LLC, DBA Sudbury Coffee W, 15 Union Ave, as requested in an application dated May 24, 2021, subject to conditions put forth by the Fire Department and Building Department.

Present: Roksana Sasanfar, Applicant/Owner

Board Members indicated their support of the application to approve a new Common Victualler License (Change of Ownership) for Sudbury Coffee Works LLC.

Chair Roberts stated that the only pending item involved the sprinkler system to be approved by the Fire Department. Town Manager Hayes confirmed the sprinkler system needed adjustment.

Board Member Dretler inquired about the applicant's related experience. Ms. Sasanfar responded that she and her husband have owned another restaurant and market in Watertown for ten years.

Ms. Sasanfar reiterated that nothing would be changing at Sudbury Coffee Works.

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Board Member Schineller seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To approve a new Common Victualler License (Change of Ownership) for Sudbury Coffee Works LLC, DBA Sudbury Coffee W, 15 Union Ave, as requested in an application dated May 24, 2021, contingent on Fire Department final approval.

Discussion on Financial Policies with Finance Director Dennis Keohane

Present: Finance Director Dennis Keohane

Chair Roberts provided an update regarding the previous Financial Policies discussion. She commented the Board left off with the Investments Topic.

Chair Roberts led Board discussion, referencing the "Town of Sudbury, Massachusetts Financial Policies Manual Draft."

Mr. Keohane confirmed that review of Town investments usually takes place in August. Ms. Dretler commented if there was any deviation from policy it be brought to the attention of the Select Board as soon as possible. Mr. Keohane agreed.

Capital Improvement Plan/Capital Assets Discussion

Chair Roberts reviewed edits made to this section, and stated that several edits were made. She stressed that inventory including all Town Capital Assets was best practice.

Board Member Carty suggested that the Board be aware of all LSRHS capital assets, and determine how to address those assets.

Capital Improvement Plan Discussion

Town Manager Hayes commented that he would be reviewing the Capital Improvement Plan format/form this summer. Board Member Dretler stated it would be helpful to see what items were brought before the Town but not passed; she wanted to understand what the history of those capital items might have been. Board Member Carty agreed with Board Member Dretler, and stressed the importance of capital planning.

Board Members agreed that the Master Plan and recommendations brought forth from the Livable Sudbury Report should be incorporated into capital planning. Chair Roberts endorsed the submittal of Capital Project Submission sheets.

The Board reviewed topics within the Capital Improvement Plan section – items 1 through 7, as well as Risk Management, and Reporting.

CIAC Reports Discussion

Town Manager Hayes advocated for a Capital Meeting Night, with participation of all related Boards/Committees and departments. Chair Roberts endorsed the idea of a Capital Meeting Night.

Board Member Schineller stated that the CIAC was composed of a group of knowledgeable members with insight. He maintained the CIAC should be continued. Board Member Carty agreed, adding that the CIAC brought value to the Town.

Chair Roberts commented that DLS suggested that Staff was performing similar tasks as the CIAC is undertaking.

OPEB Reports Discussion

Chair Roberts confirmed that the Subcommittee made no policy changes to the OPEB section.

Appendix A, B Discussion

Definition of Capital Discussion

Mr. Keohane recommended that the “Prediction of Credit Rating Policy” be relocated to a different part of the report such as the financial reserves section.

Chair Roberts proposed that she and co-subcommittee member Schineller pull the edits together, and present a final report to the Board within the next several weeks. Chair Roberts noted that FinCom suggested reviewing edits and changes at a joint meeting in August.

Resident Manish Sharma, 77 Colonial Road, asked if the Board Members would be reviewing each financial asset of the Town including all Town-owned real estate, as well as solar panel installations. Mr. Sharma questioned if the Board had discussed the structure and term of debt in accordance with guidelines suggested by DLS. Mr. Sharma suggested that Mr. Keohane and Ms. Peterson of SPS did not have enough financial experience. Chair Roberts confirmed the Board was working on improvements of Town Financial policies, adding that Mr. Keohane was an excellent financial director.

Board Member Dretler requested additional information regarding the solar program. Chair Roberts replied that the solar topic would be addressed at the next Board meeting.

FinCom Chair, Scott Smigler, confirmed that he would look forward to a joint meeting with the Select Board.

Discussion and update on Remote/Hybrid meeting legislation and related Town planning

Chair Roberts summarized recent State legislation regarding remote meetings.

Board Members agreed that the remote meetings operated efficiently, and promoted increased civic engagement/participation.

Chair Roberts recommended conducting Board meetings in the remote mode until other options have been fully examined.

Town Manager Hayes mentioned that the Board and other Town committees must be mindful of scheduling conflicts, and opined about the quality of recording and playback via the cloud. Town Manager Hayes mentioned the testing of other Town locations in addition to the Town Hall would be examined.

Town Manager Hayes detailed remote meetings did require additional staff time in consideration of technology aspects.

Board Member Dretler suggested the members of Town committees/boards could receive additional training to help assist in the process. Town Manager Hayes agreed. Chair Roberts also agreed, and noted that she and Vice-Chair Russo had been trained and were assisting with the technological aspects associated with the remote meetings.

Discuss process for Town Manager review and goal setting

Chair Roberts stated the process for Town Manager review and goal setting would be discussed at the next Board meeting on June 29, 2021. She suggested that Members think about immediate goals as well as long-term, multi-year goals.

Chair Roberts acknowledged that Town Manager contract aspects would be discussed in Executive Session on June 29, 2021.

Follow-up discussion and expected vote to ratify vote taken in Executive Session on proposed letter to ISO-New England

Board Member Carty recused himself from the discussion.

Chair Roberts read in the words of the motion. Board Member Schineller moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 3-1; Schineller-aye, Dretler-no, Russo-aye, Roberts-aye

VOTED: To ratify vote taken in Executive Session on proposed letter to ISO-New England

Chair Roberts noted that the ISO-New England letter would be added to supporting materials for tonight's meeting.

Consent Calendar

Vote to appoint Sandy Lasky as a temporary member of MWRTA advisory board until the return of Debra Galloway (Senior Center Director).

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To appoint Sandy Lasky as a temporary member of MWRTA advisory board until the return of Debra Galloway (Senior Center Director).

Vote to accept the resignations of Thomas Friedlander as a full member of the Conservation Commission, and Erica Silverman from the Diversity, Equity and Inclusion (DEI) Commission, and send both a thank you letter for their service to the Town

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To accept the resignations of Thomas Friedlander as a full member of the Conservation Commission, and Erica Silverman from the Diversity, Equity and Inclusion (DEI) Commission, and send both a thank you letter for their service to the Town

Vote to appoint Thomas Friedlander as an Associate member of the Conservation Commission for a term expiring 5/31/23

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To appoint Thomas Friedlander as an Associate member of the Conservation Commission for a term expiring 5/31/23.

Vote to enter into the Town record and congratulate Colby Chung and Ryan I. Grummer of Scout Troop 63 for having achieved the high honor of Eagle Scout

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To enter into the Town record and congratulate Colby Chung and Ryan I. Grummer of Scout Troop 63 for having achieved the high honor of Eagle Scout.

Discussion on Fall Town Meeting

Several Board Members indicated that there may be a need for a Fall Town Meeting. Town Manager Hayes confirmed that a public hearing would be necessary, and suggested that such public hearing could be scheduled for the July 13th meeting.

Chair Roberts commented that she wanted a better understanding regarding the easement considerations. Board Member Carty stated that Staff had already addressed that aspect, and agreed a Fall Town Meeting was not necessary. Town Manager Hayes indicated that a Fall Town Meeting was not necessary.

Board Member Dretler mentioned that certain Town goals had great importance, and requested a meeting with Environmental Planner Beth Suedmeyer and Town Manager Hayes.

Board Member Schineller acknowledged there was uncertainty regarding Fall Town Meeting, and a public hearing would help in making that decision.

Discussion and vote new Select Board liaison assignments

Board Member Carty commented that the role of a liaison includes advising and reporting; not acting as a part of the Board or Committee. Board Member Dretler added that a liaison is not a member, but can provide information.

Board Member Carty agreed to assuming the liaison role for Board of Assessors.

Board Member Schineller indicated he would be liaison for the Fire Station.

Vice-Chair Russo agreed to being the liaison for the Cultural Council.

Board Member Dretler agreed to be liaison for the Park & Recreation Commission and the 9/11 Memorial Garden Committee.

Board Member Dretler detailed that the Master Plan Steering Committee had dissolved when the Master Plan was approved, and she and Board Member Carty were members of that Commission.

Chair Roberts agreed to be liaison for the Board of Health. She noted that some committee memberships needed to be reviewed.

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Dretler-aye, Russo-aye, Carty-aye, Schineller-aye, Roberts-aye

VOTED: To approve and amend Select Board liaison assignments

Discussion and potential vote to release Town Counsel Opinion related to Park and Recreation User Fees authority

Town Manager confirmed that Town Counsel recommended this vote be made in open meeting. He detailed that he, the Director of Park & Recreation, and the Finance Director have had a series of meetings regarding fee structure and related matters. Town Manager Hayes confirmed there was a budgetary review and a Commission review; the goal is to continue being collaborative and cooperative.

Vice-Chair Russo suggested it would be wise to capture all fee schedules.

Vice-Chair Russo motioned to release Town Counsel Opinion related to Park and Recreation User Fees authority. Board Members Schineller seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Carty-aye, Schineller-aye, Roberts-aye

VOTED: To release Town Counsel Opinion related to Park and Recreation User Fees authority.

Review open session minutes of 5/13/21 and 5/18/21 and possibly vote to approve minutes**Minutes of 5/13/21**

Chair Roberts read in the words of the motion. Board Member motioned in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Schineller-aye, Dretler-aye, Carty-aye, Roberts-aye

VOTED: To approve the 5/13/21 minutes, as edited

Minutes of 5/18/21

Chair Roberts read in the words of the motion. Board Member motioned in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Russo-aye, Schineller-aye, Dretler-aye, Carty-aye, Roberts-aye

VOTED: To approve the 5/18/21 minutes, as edited

Citizen's Comments (cont.)

None

Upcoming Agenda Items

June 29th

- Financial Polices Discussion
- Town Manager Goal Setting
- Newsletter Format
- Review of Historic Districts Commission discussion regarding Police Department request for gate
- Boards/Committees annual reappointments
- Transportation Committee appointments and MWRTA programs

Future Meetings

- SudburyTV – OARS Discussion
- Solar Update
- Nobscot property contract negotiations update
- BFRT update (July 13)
- Public Hearing regarding Fall Town Meeting (July 13th)
- LSRHS Agreement discussion
- Sewataro Subcommittee update – July
- Executive Session to Discuss Contract of Town Manager and Self-Evaluation Process (June 29)
- American Rescue Plan Discussion

Vote to Adjourn Meeting

Chair Roberts read in the words of the motion. Board Member Carty moved in the words of the Chair. Vice-Chair Russo seconded the motion.

It was on motion 5-0; Carty-aye, Roberts-aye, Schineller-aye, Russo-aye, Dretler-aye

VOTED: To adjourn the meeting

There being no further business, the meeting was adjourned at 11:31 p.m.

SUDBURY SELECT BOARD

WEDNESDAY, JUNE 23, 2021

(Meeting can be viewed at www.sudburytv.org)

Present: Chair Jennifer Roberts, Vice-Chair Russo, Select Board Member Daniel E. Carty, Select Board Member William Schineller, Select Board Member Janie Dretler, Town Manager Henry Hayes

The statutory requirements as to notice having been complied with, the meeting was convened at 7:14 p.m., via Zoom telecommunication mode.

Chair Roberts announced the recording of the meeting and other procedural aspects included in the meeting.

Call to Order/Roll Call

Select Board Roll Call: Schineller-present, Carty-present, Dretler-present, Russo-present, Roberts-present

Opening Remarks by Chair

The Chair did not share any opening remarks.

Reports from Town Manager

There were no reports presented by Town Manager.

Reports from Select Board

Board Members did not share reports.

Citizen's Comments

Resident Pat Brown, 24 Whispering Pine Road, asked that information regarding the former Boy Scout property on Nobscot Road be provided to the public and the Board. She added the Sudbury Housing Trust had provided abutters with such information regarding the property.

Ms. Brown requested that the Nobscot Road information be shared at a Select Board meeting in July.

Discussion and possible Vote on potential events, activities, or actions for the community that may increase awareness and sensitivities towards acts of antisemitism and respecting all of humanity

Chair Roberts stated that she had received several e-mails suggesting that the Board consider, and perhaps issue a statement regarding recent antisemitic events which took place at Sudbury schools. Chair Roberts confirmed that she spoke to Police Chief Scott Nix and to Rabbi Freeman, Rabbi Breindel and Rabbi Eiduson. She stated that on Friday, Board Member Dretler suggested the Board take timely action.

Board Member Dretler stated that she reached out to local clergy inquiring if they wanted to hear from the Select Board regarding the incidents. Chair Roberts added that she received feedback from Rabbi Freeman today, who expressed his support and gratitude about the Board discussing the matter. She added that Chief Nix confirmed an increase in such antisemitic actions.

Discussion and possible vote to create and release a statement related to the recent antisemitic incidents in the Town

Chair Roberts maintained that a joint statement had been released by the Town Manager and Chief Nix, but nothing presented by the Select Board.

Vice-Chair Russo stated that such a statement from the Select Board was important in efforts to stop additional acts from occurring. He indicated that the Board was striving for a prejudice and harassment-free community.

Board Member Schineller agreed with the sentiments expressed, and emphasized that hate does not belong in Sudbury. Board Member Schineller stated he was personally affected by such actions when he was in high school.

Chair Roberts stressed that the Board had to take a leadership role at this time.

Board Member Carty stated he also released a public message, and agreed to submit that message to the Board. He indicated that the Board needed to tread lightly in consideration of Sudbury Public Schools and Police Department policy regarding the incidents. Chair Roberts acknowledged that all entities required respect, and any actions suggested by the Board would be proactive.

Vice-Chair Russo maintained that the Board was not discussing anything out of the Board's jurisdiction.

Board Member Carty questioned the necessity of Town Manager Hayes working on this problem on Juneteenth, which could have been addressed today and tonight.

The "Statement of the Sudbury Select Board against Antisemitism in Our Community" drafted by Board Member Dretler, emphasized that the Sudbury Select Board "strongly condemns the recent acts of antisemitic behavior in Sudbury."

The "Statement" included that the Board would reach out to the New England Chapter of the Anti-Defamation League (ADL), local clergy, and faith organizations to help advance partnership.

The "Statement" further detailed that the Sudbury DEI was charged with the mission "to support diversity, achieve equity, and foster inclusion for every member of this community, respecting all aspects of identities."

The last sentence of the "Statement" emphasized the Town's goal of creating a safe, inclusive environment in Sudbury.

Board Members reviewed the "Statement," and provided edits.

Board Member Carty stated that because the two incidents happened at Town public schools, the "Statement" should include language that the Board and other interested parties are partnering with school and police policies. Board Member Dretler agreed, and asked if the School Superintendents had reached out to the ADL. Board Members agreed that it was important that the Select Board partner with SPS and LSRHS. Vice-Chair Russo asserted that "we are stronger together."

Vice-Chair Russo recommended that the Board make the initial request to ADL, and DEI can organize prospective meetings with ADL. Chair Roberts agreed that the initial outreach to ADL should be performed by the Select Board.

Town Manager Hayes recommended that the word “tolerance” be substituted with the word “acceptance.” as it appeared in the closing sentence of the “Statement.”

Board Members agreed with all suggestions.

Board Member Dretler indicated that she would submit the “Statement” to the local newspapers, the front page of the Town webpage, and the Town Facebook page.

Chair Roberts confirmed that she would contact the ADL, and attend the DEI Commission meeting tomorrow, and would report back to the Board.

Resident Pat Brown stated she appreciated the statements made regarding the recent events. She stated that the Board has made no effort to understand what actually happened, and who was at fault.

Board Member Dretler motioned to approve the “Statement of the Sudbury Select Board against Antisemitism in our Community,” as edited; allowing for grammatic and spelling review prior to publication. Board Member Schineller seconded the motion.

Board Member Dretler withdrew her motion until public comments were heard.

Citizen’s Comments

Resident Linda Faust, 189 Boston Rd, commented that she cried when she heard about the incident. Her grandparents died in concentration camps, and her parents had been through tough times. She opined about what the swastika symbol means to kids.

Chat comment received from Toby (last name and address not provided), who stated that two antisemitic actions are too many, and education with a zero-tolerance approach are necessary.

Resident Sue Abrams, 24 Hudson Road, maintained that the goal would be to interrupt acts of anti-Semitism/hate; and include such language in the “Statement.”

Resident Marla Platt, 144 Peakham Road, suggested that the “Statement” include respect, understanding mutual acceptance, and celebration of diversity in Sudbury.

Resident Helen Shik, 252 Old Lanchaster Road, stated that her children attended the Sudbury Public schools and participated in the STOP (Students Opposing Prejudice) Program, which began 25 years ago (the time that a similar swastika graffiti occurred at the Peter Noyes School. Ms. Shik suggested the Town investigate who the perpetrator/s might be.

Resident Carl Offner, 46 Sunset Path, mentioned the history and background of antisemitism.

Resident Sharon Schmidt-Gross, 298 Maynard Road, provided details regarding her group which educates people. She recommended the Board work with the ADL.

Resident Nalini Luthra, 941 Concord Road, suggested the words “public engagement” be included in the “Statement.”

Board Member Dretler motioned to approve the “Statement of the Sudbury Select Board against Antisemitism in our Community,” as edited; allowing for grammatic and spelling review prior to publication. Board Member Schineller seconded the motion.

It was on motion 5-0; Dretler-aye, Russo-aye, Carty-aye, Schineller-aye, Roberts-aye

VOTED: To approve the “Statement of the Sudbury Select Board against Antisemitism in our Community,” as edited; allowing for grammatic and spelling review prior to publication.

Chair Roberts offered to complete the grammatic and spelling review prior to publication.

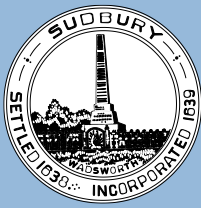
Adjourn

Chair Roberts read in the words of the motion. Board Member Dretler moved in the words of the Chair. Board Member Schineller seconded the motion.

It was on motion 5-0; Russo-aye, Dretler-aye, Schineller-aye, Carty-aye, Roberts-aye

VOTED: To adjourn the meeting

There being no further business, the meeting was adjourned at 8:56 p.m.



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

15: Citizen's Comments (cont)

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Citizen's Comments (cont)

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

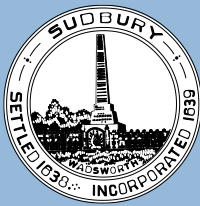
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Select Board	Pending

07/13/2021 6:00 PM



SUDBURY SELECT BOARD
Tuesday, July 13, 2021

MISCELLANEOUS (UNTIMED)

16: Upcoming Agenda Items

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Upcoming Agenda Items

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Daniel E Carty	Pending
Select Board	Pending

07/13/2021 6:00 PM

POTENTIAL UPCOMING AGENDA ITEMS/MEETINGS

MEETING	DESCRIPTION
July 27	Annual Board and Committee/Commission reappointments
	Election worker annual reappointments
	Discussion on possible tree removal at Heritage Park
Date to be Determined	American Rescue Plan discussion
	Budget Strategies Task Force
	By-law items to examine - Special Events & Demonstration Permits; Common Victualler License Holders (Related to Farm Act exemptions, citizen request); Nuisance / Blight Bylaw; Removal Authority of members from appointments
	Citizen Leadership Forum
	Fairbank Community Center update (ongoing)
	Financial policy review (separate meeting to be scheduled)
	Health/COVID-19 update (as of 3/18/20)
	Housing Choice discussion
	Invite Commission on Disability Chair to discuss Minuteman High School
	LS agreement
	Local receipts – fee schedule review (Vice-chair Russo)
	Nobscot property discussion (possibly 7/27)
	Projects to track using form (KPIs)
	Quarterly review of approved Executive Session Minutes for possible release (February, May, August and November). Consider separate meeting solely for this purpose.
	Quarterly update on Bruce Freeman Rail Trail (BFRT) (March, June, September, December)
	Quarterly update on CSX (January, April, July, October)
	Route 20 empty corner lot – former gas station
	Sewataro Financial Statement review
	Sewataro Future planning - \$ for negotiations, insurance, contract
	Sidewalks discussion
	State of Emergency rescinding letter
	Town Manager Goals and Evaluation process
	Town meeting recap – year in review
	Town-wide traffic assessment and improve traffic flow
	Update from SB Policy Subcommittee
	Update on crosswalks (Chief Nix/Dan Nason)
	Update on traffic policy (Chief Nix)
	Work Session with Town Counsel: Select Board/Town Manager Code of Conduct and other procedural training
	Select Board requests for future agenda items at end of meeting
Standing Items for All Meetings	Citizens Comments, continued (if necessary)



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

CONSENT CALENDAR ITEM

17: Conservation Commission appointments

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts and Vice-Chair Russo

Formal Title: Vote to approve the following Town Manager appointments to the Conservation Commission: Luke Faust as an associate member for a term ending 5/31/24; also appoint Jeremy Cook as a full member for a term ending 5/31/23.

Recommendations/Suggested Motion/Vote: Vote to approve the following Town Manager appointments to the Conservation Commission: Luke Faust as an associate member for a term ending 5/31/24; also appoint Jeremy Cook as a full member for a term ending 5/31/23.

Background Information:

See attached applications. There are two copies of Jeremy Cook's applications: one with text formatted to fit into fields; other is signed.

Financial impact expected:n/a

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

TOWN OF SUDBURY APPLICATION FOR APPOINTMENT

SELECT BOARD
278 OLD SUDBURY ROAD
SUDBURY, MA 01776

FAX: (978) 443-0756
E-MAIL: selectboard@sudbury.ma.us

Board or Committee Name: Conservation Commission

Name: Luke Faust

Address: 35 Tavern Cir Sudbury, MA

Email Address:

Home phone: NA

Work or Cell phone:

Years lived in Sudbury: 2

Brief resume of background and pertinent experience:

Ecological research in and out of college. Now work in Finance in the non-profit sector. Passionate about wildlife, conservation, and the outdoors. MBA intern at Maine Audubon as an analyst. Sudbury town coordinator for National Audubon Society's Christmas Bird Count.

Municipal experience (if applicable):

NA

Educational background:

BA from Williams College in Biology in 2014. Thesis on tadpole population dynamics, MBA from Boston University in Finance and Non-Profit Management in 2019

Reason for your interest in serving:

We moved to Sudbury in large part due to the large amounts of conserved spaces in the town. Want to do my part in supporting that effort. Love the work that the commission does.

Times when you would be available (days, evenings, weekends):

Evenings and Weekends generally.

Do you or any member of your family have any business dealings with the Town? If yes, please explain:

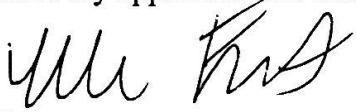
My wife and I recently went through approval process for landscaping project on our property. Met with the conservation commission in Feb and Mar 2021.

LDF (Initial here that you have read, understand and agree to the following statement)

I agree that if appointed, I will work toward furtherance of the committee's mission statement; and further, I agree that I will conduct my committee activities in a manner which is compliant with all relevant State and Local laws and regulations, including but not limited to the Open Meeting Law, Public Records Law, Conflict of Interest Law, Email Policy and the Code of Conduct for Town Committees.

I hereby submit my application for consideration for appointment to the Board or Committee listed above.

Signature



Date

6/16/2021

Attachment 17.a: Faust_Luke_2021_redact (4692 : Conservation Commission appointments)

TOWN OF SUDBURY
APPLICATION FOR APPOINTMENT TO
Conservation Committee

Planning and Community Development Department
 278 OLD SUDBURY ROAD
 SUDBURY, MA 01776

PHONE: 978.639.3387
 FAX: 978.639.3314
 E-MAIL: PCD@sudbury.ma.us

Name: Dr. Jeremy Cook

Brief resume of background and experience:

I moved to Massachusetts in 2004 for residency at BIDMC. I then completed a fellowship and was hired on as a staff surgeon where I remained until 2011. At that time I was hired by Mount Auburn Hospital to help start a

Address: 123 Maynard Farm Rd Sudbury, MA

Home phone: [REDACTED]

Work phone: [REDACTED]

Years lived in Sudbury: 8 as of August

E-Mail Address: [REDACTED]

Municipal experience (If applicable):

Associate Conservation Committee Member Sept 2020-present.
 Served on Massachusetts Department of Public Health Committee for Healthy Massachusetts Disease

Educational background:

Bachelor of Arts, Biology/Life Sciences-Southern Illinois University
 Doctor of Podiatric Medicine-Samuel Merritt
 Master of Public Health, Harvard University

Employment and/or other pertinent experience:

Private Practice Cambridge, MA.
 Director of Research, Dept Surg, Div Pod Surg MAH
 Director of Quality and Safety, Dept Surg, Div Pod Surg MAH

Reason for your interest in serving: I enjoy the outdoors, Sudbury's expansive natural resources were a major factor when we decided to move here. I would like to see it preserved.

Times when you would be available (days, evenings, weekends): Evening and weekends best

Do you or any member of your family have any business dealings with the Town? If yes, please explain:

None.

JC (Initial here that you have read, understand and agree to the following statement)

I agree that if appointed, I will work toward furtherance of the committees' mission statement as adopted by the Board of Selectmen and further, I agree that I will conduct my committee activities in a manner which is compliant with all relevant State and Local laws and regulations, including but not limited to the Open Meeting Law, Public Records Law, Conflict of Interest Law, Email Policy and the Code of Conduct for Town Committees.

I hereby submit my application for consideration for appointment to the Board or Committee listed above.

Signature Jeremy Cook

Date 5/31/21

TOWN OF SUDBURY APPLICATION FOR APPOINTMENT

SELECT BOARD
278 OLD SUDBURY ROAD
SUDBURY, MA 01776

FAX: (978) 443-0756
E-MAIL: selectboard@sudbury.ma.us

Board or Committee Name: _____

Name: _____

Address: _____ Email Address: _____

Home phone: _____ Work or Cell phone: _____

Years lived in Sudbury: _____

Brief resume of background and pertinent experience:

Municipal experience (if applicable):

Educational background:

Reason for your interest in serving:

Times when you would be available (days, evenings, weekends):

Do you or any member of your family have any business dealings with the Town? If yes, please explain:

_____ (Initial here that you have read, understand and agree to the following statement)

I agree that if appointed, I will work toward furtherance of the committee's mission statement; and further, I agree that I will conduct my committee activities in a manner which is compliant with all relevant State and Local laws and regulations, including but not limited to the Open Meeting Law, Public Records Law, Conflict of Interest Law, Email Policy and the Code of Conduct for Town Committees.

I hereby submit my application for consideration for appointment to the Board or Committee listed above.

Signature _____ Date _____

Attachment 17.c: Application-for-Appointment_Cook (4692 : Conservation Commission appointments)



SUDBURY SELECT BOARD

Tuesday, July 13, 2021

CONSENT CALENDAR ITEM

18: Vote Liaison Assignment to BFRT

REQUESTOR SECTION

Date of request:

Requestor: Chair Roberts

Formal Title: Vote to appoint Vice-chair Charlie Russo as liaison to the Bruce Freeman Rail Trail (BFRT) Advisory Task Force.

Recommendations/Suggested Motion/Vote: Vote to appoint Vice-chair Charlie Russo as liaison to the Bruce Freeman Rail Trail (BFRT) Advisory Task Force.

Background Information:

Financial impact expected:n/a

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Patty Golden	Pending
Henry L Hayes	Pending
Jonathan Silverstein	Pending
Jennifer Roberts	Pending
Select Board	Pending

07/13/2021 6:00 PM

**SUDBURY SELECT BOARD
LIAISON AND COMMITTEE ASSIGNMENTS
2021-2022**

Chair Roberts	Member Dretler	Member Carty	Vice-chair Russo	Board Member Schineller
Board of Health	Board of Health	Board of Assessors	Agricultural Commission	Energy Committee
Chamber of Commerce	Capital Improvement Advisory Committee (CIAC)	Goodnow Library Trustees	Conservation Committee	Finance Committee
Commission on Disability	Memorial Day Parade Committee	L-S Regional High School	Design Review Board	Historical Commission
Council on Aging	Traffic Safety Committee	Sudbury Public Schools	Earth Removal Board	Historical Districts Commission
Finance Committee	Permanent Building Committee	Sudbury Water District	Land Acquisition Review Committee	Permanent Building Committee
Sudbury Housing Authority	Park & Rec Commission		Medical Reserve Corp	Planning Board
Town Manager/Town Departments			Planning Board	Ponds and Waterways
Town Moderator			Zoning Board (ZBA)	
Lincoln Board of Selectmen			Cultural Council	
Town Historian			BFRT Advisory Task Force	

MEMBER OF COMMITTEE(S):

Community Preservation Committee (CPC)	M.A.G.I.C.	Budget Strategies Task Force	9/11 Memorial Garden Committee	Budget Strategies Task Force
	Sudbury Housing Trust	M.B.T.A.	Community Emergency Response Team (CERT)	Military Support Network
		Transportation Committee		

Attachment 18.a: Copy of LIAISON LIST 2021-22 (4693 : Vote Liaison Assignment to BFRT)