

SUDBURY SELECT BOARD
TUESDAY DECEMBER 6, 2022
6:00 PM, ZOOM

Item #	Time	Action	Item
	6:00 PM		CALL TO ORDER
EXECUTIVE SESSION			
1.		<i>VOTE</i>	Vote to enter into Executive Session for the following purpose: Conduct strategy session in preparation for negotiations with nonunion personnel and/or to conduct contract negotiations with nonunion personnel (new Town Manager) pursuant to General Laws chapter 30A, §21(a)(exception 2).
2.		<i>VOTE</i>	Continue Executive Session to discuss strategy with respect to collective bargaining (Firefighters) if an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares (exception 3).
3.		<i>VOTE</i>	Vote to close Executive Session and resume Open Session.
			Opening remarks by Chair
			Reports from Town Manager
			Reports from Select Board
			Public comments on items not on agenda
4.			Interim Town Manager Bilodeau to present Employee of the Year recognition.
PUBLIC HEARING			
5.	7:30 PM	<i>VOTE</i>	Annual Tax Classification hearing - In accordance with General Laws Ch. 40, sec. 56, as amended, to determine the percentage of local tax levy which will be borne by each class of real and personal property, relative to setting the Fiscal Year 2023 tax rate. In attendance will be the Board of Assessors (Joshua M. Fox, Esq. Trevor A. Haydon, Liam J. Vesely, Chair), Cynthia Gerry, Director of Assessing, and presenting will be Harald Scheid and Alex Cervone, Principal Regional Assessors.
MISCELLANEOUS			
6.		<i>VOTE</i>	Meet with candidate Laurie Dell'Olio and approve this proposed appointment as Town Accountant.

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. Some items may be taken out of order or not be taken up at all. The Chair will strive to honor timed items as best as possible, however, the estimated timing may occasionally be inaccurate.

Item #	Time	Action	Item
7.		<i>VOTE</i>	Discussion and possible vote on whether to approve the Town Manager Contract between the Town of Sudbury and Andrew J. Sheehan, and ratify the vote taken in Executive Session.
8.		<i>VOTE</i>	Interview the following applicants for the Diversity, Equity and Inclusion Commission (DEI): Andrea C. Meggison (1 year term), Isabelle Li (1 year term), Kimberly Napoli (1 year term), Serena S. Hu (2 year term). Following interviews, vote to appoint candidates for terms as noted above.
9.		<i>VOTE</i>	Open 2023 Warrant and announce Annual Town Meeting dates of May 1-3, 2023 at Lincoln-Sudbury Regional High School. The deadline to submit articles for the Town Meeting Warrant is Tuesday, Jan. 31, 4:30 PM.
10.			Update and discussion on Select Board Transportation Goal
11.		<i>VOTE</i>	Discuss and possible vote to approve proposed 2023 Municipal Update Newsletter Schedule of Deadlines for Select Board assignment, submission and approval.
12.		<i>VOTE</i>	Vote to review and possibly approve the open session minutes of 9/13/22.
13.			Public Comments (cont)
14.			Upcoming agenda items
CONSENT CALENDAR			
15.		<i>VOTE</i>	Vote to accept a donation of \$30 to the Commission on Disability, account 118348/483100: Handicap Parking Contributions & Donations, from Patricia A Brown, 34 Whispering Pine Road.

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. Some items may be taken out of order or not be taken up at all. The Chair will strive to honor timed items as best as possible, however, the estimated timing may occasionally be inaccurate.



SUDBURY SELECT BOARD

Tuesday, December 6, 2022

EXECUTIVE SESSION

1: Executive Session to discuss Town Manger contract

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Vote to enter into Executive Session for the following purpose: Conduct strategy session in preparation for negotiations with nonunion personnel and/or to conduct contract negotiations with nonunion personnel (new Town Manager) pursuant to General Laws chapter 30A, §21(a)(exception 2).

Recommendations/Suggested Motion/Vote: Vote to enter into Executive Session for the following purpose: Conduct strategy session in preparation for negotiations with nonunion personnel and/or to conduct contract negotiations with nonunion personnel (new Town Manager) pursuant to General Laws chapter 30A, §21(a)(exception 2).

Background Information:

Financial impact expected:

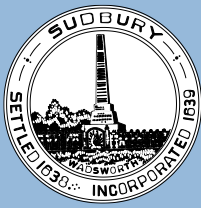
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

EXECUTIVE SESSION

2: Executive session CB Firefighters

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Continue Executive Session to discuss strategy with respect to collective bargaining (Firefighters) if an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares (exception 3).

Recommendations/Suggested Motion/Vote: Continue Executive Session to discuss strategy with respect to collective bargaining (Firefighters) if an open meeting may have a detrimental effect on the bargaining position of the public body and the chair so declares (exception 3).

Background Information:

Financial impact expected:

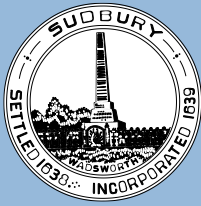
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

EXECUTIVE SESSION
3: Close Executive 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: Vote to close Executive Session and resume Open Session.

Background Information:

Financial impact expected:

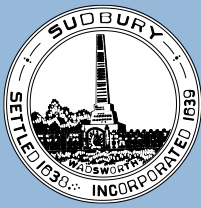
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD

Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

4: Employee of the Year recognition

REQUESTOR SECTION

Date of request:

Requestor: Interim Town Manager Bilodeau

Formal Title: Interim Town Manager Bilodeau to present Employee of the Year recognition.

Recommendations/Suggested Motion/Vote: Interim Town Manager Bilodeau to present Employee of the Year recognition.

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office Pending

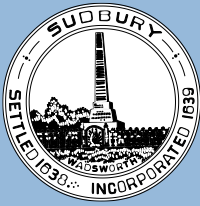
Town Manager's Office Pending

Town Counsel Pending

Select Board Pending

Select Board Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

PUBLIC HEARING

5: Annual Tax Classification hearing (cont from 11/29)

REQUESTOR SECTION

Date of request:

Requestor: Cynthia Gerry Director of Assessing

Formal Title: Annual Tax Classification hearing - In accordance with General Laws Ch. 40, sec. 56, as amended, to determine the percentage of local tax levy which will be borne by each class of real and personal property, relative to setting the Fiscal Year 2023 tax rate. In attendance will be the Board of Assessors (Joshua M. Fox, Esq. Trevor A. Haydon, Liam J. Vesely, Chair), Cynthia Gerry, Director of Assessing, and presenting will be Harald Scheid and Alex Cervone, Principal Regional Assessors.

Recommendations/Suggested Motion/Vote: Annual Tax Classification hearing - In accordance with General Laws Ch. 40, sec. 56, as amended, to determine the percentage of local tax levy which will be borne by each class of real and personal property, relative to setting the Fiscal Year 2023 tax rate. In attendance will be the Board of Assessors (Joshua M. Fox, Esq., Trevor A. Haydon, Liam J. Vesely, Chair), Cynthia Gerry, Director of Assessing, and presenting will be Harald Scheid and Alex Cervone, Principal Regional Assessors.

Background Information:
attached hearing notice and other doc to be provided
CONTINUED FROM 11/29/22 HEARING

Financial impact expected:

Approximate agenda time requested: 30 minutes

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



**FISCAL YEAR 2023
CLASSIFICATION HEARING**

December 6, 2022

Select Board

Charles Russo, Chair

Janie W. Dretler, Vice Chair

Members

Daniel E. Carty

Jennifer S. Roberts

Lisa V. Kouchakdjian

Board of Assessors

Liam J. Vesely, Chair

Joshua M. Fox

Trevor Haydon

Harald Scheid & Alex Cervone, Consulting Assessors

Cynthia Gerry, Director of Assessing

Introduction

Each year, prior to the mailing of 3rd quarter tax bills, a public hearing is held by the Select Board in conjunction with the Board of Assessors. The public hearing known as the Classification Hearing provides an opportunity for the Select Board to discuss and decide on the distribution of the tax burden to be allocated among the major classes of property. Chapter 40, Section 56 of the Massachusetts General Laws, dictates the hearing procedure.

Prior to the Hearing, all properties must be assessed at their full and fair cash value as of the January 1st assessment date. The Fiscal Year 2023 assessment date is January 1, 2022.

The steps necessary to complete the Classification Hearing and Tax Rate Setting process are defined below:

Pre-classification Hearing Steps

- Step 1: Determination of the property tax levy (Budget Process)
- Step 2: Determine assessed valuations (Assessors)
- Step 3: Tabulate assessed valuations by class (Assessors)
- Step 4: Obtain DOR value certification (Assessors)
- Step 5: Obtain certification of new growth revenues (Assessors)

Classification Hearing Steps

- Step 6: Classification hearing presentation (Assessors & Select Board)
- Step 7: Review and discuss tax shift options (Select Board)
- Step 8: Voting a tax shift factor (Select Board)

Post Classification Hearing Steps

- Step 9: Sign the LA-5 Classification Form (Select Board)
- Step 10: Send annual recap to DOR for tax rate approval (Assessors)
- Step 11: Obtain DOR approval of tax rates (DOR)

Terminology

The following represents frequently used tax discussion terminology:

Levy: The tax levy (or levy) is the amount of property taxes to be raised. The levy amount is determined by the budget process. The total amount of the approved budget less revenues from other sources like motor vehicle excise, municipal fees, and state aid is the amount to be raised through property taxation. In Sudbury, for Fiscal Year 2023, the levy to be raised is \$99,026,475. This represents a 3.2% increase over last year’s levy of \$ 95,995,344.

Levy Ceiling: The levy ceiling is 2.5 percent of the full value of the town and represents the maximum property tax revenue that can be raised under Proposition 2 ½. Based on Sudbury’s Fiscal Year 2023 total valuation of \$6,171,026,965 the town cannot levy taxes in excess of \$154,275,674.

New Growth Revenue: Property taxes derived from newly taxable properties like new construction, additions, subdivisions, and personal property. The Department of Revenue has certified Sudbury’s new growth revenue for fiscal year 2023 at \$845,255.

Levy Limit: Also referred to as the “maximum allowable levy,” the levy limit is calculated by adding 2.5 percent of the previous year’s levy limit, (which was \$93,782,458) plus new growth revenue, and proposition 2½ overrides, capital expenditure exclusions, and debt exclusions. The certified maximum allowable levy for fiscal year 2023 is \$99,485,516.

Excess Levy Capacity: Excess levy capacity is the difference between the levy and the levy limit. Sudbury’s excess levy capacity is an estimated \$459,401.

The Fiscal Year 2023 Levy Limit and Amount to be Raised

The following is a calculation of Sudbury’s estimated levy for Fiscal Year 2023.

Fiscal year 2022 levy limit	\$ 93,782,458
Levy increase allowed under Prop. 2 ½	2,344,561
New growth revenue	845,255
Debt excluded under Prop. 2 ½	2,513,242
Fiscal year 2022 Maximum Allowable Levy	99,485,516
Levy to be raised (rounded by tax rate)	\$99,026,475
Excess levy capacity	\$459,041

Valuations by Class Before Tax Shift (1a5)

<u>Major Property Class</u>	<u>Valuation</u>	<u>Percent</u>	<u>Res vs CIP%</u>
Residential	5,708,346,257	92.50237%	92.50237%
Commercial	269,234,148	4.36287%	
Industrial	38,246,300	0.61977%	7.49763%
Personal Property	155,200,260	2.51498%	
TOTAL	6,171,026,965	100.00000%	

Assessed Valuations

Sudbury’s valuations are adjusted annually to reflect changes in the real estate market. An assessment-to-sale ratio study comparing calendar year 2021 sales with fiscal year 2023 assessments indicates that most residential property valuations were assessed below fair market value. Certain residential properties experienced significant increases in valuation, while some saw more modest increases. As a group single-family residential valuation rose approximately 19.5%. Other residential property classes, including condominium and multi-family apartment buildings, have also experienced market appreciation.

A similar study of assessments and sale prices for commercial and industrial properties indicated that property valuations for these property classes were assessed below fair market value.

Property Class	22 Valuation	23Valuation	Change(apx.)
Single-family	4,361,661,902	5,210,629,707	19.5%
Condominiums	253,617,977	283,791,565	11.9%
2 Family	10,421,900	12,592,400	20.8%
Multi-family	1,466,900	1,749,400	19.3%
Commercial	204,988,100	257,964,100	25.8%
Industrial	34,203,500	38,246,300	11.8%
Personal Property	144,636,520	155,200,260	7.3%

Attachment5.a: FY 2023 Classification Hearing (5601 : Annual Tax Classification hearing (cont from 11/29))

Shifting the Tax Burden

Municipalities with a large commercial/industrial tax base often see fit to shift the tax burden to help maintain lower residential taxes. Sudbury, though having a relatively small commercial tax base, has historically chosen to adopt a split tax rate.

In recent years, the Select Board has adopted a shift factor that has yielded relatively uniform tax rate increases in both the residential and commercial sectors. Though the commercial, industrial, and personal property (CIP) sector makes up approximately 7.5 percent of the taxable valuation base, adoption of the classification shift factor (see below) has resulted in this sector paying about 9 percent of Sudbury's property taxes.

Tax Rates and Options

Sudbury's uniform, single tax rate, without applying shift factors, is estimated at \$16.05 per thousand.

There are any number of tax rate options the Select Board might chose. Several that might be considered are as follows:

Option	CIP Shift	Res. Shift	CIP Tax Rate	Res. Tax Rate
Single Tax Rate	1.0000	1.0000	16.05	16.05
10% Shift	1.1000	0.9919	17.65	15.92
20% Shift	1.2000	0.9838	19.26	15.79
26% Shift (balance)	1.2600	0.9789	20.22	15.71
30% Shift	1.3000	0.9757	20.86	15.66
40% Shift	1.4000	0.9676	22.47	15.53
50% Shift (maximum allowed)	1.5000	0.9595	24.07	15.40

See Addendum B for additional tax rate options.

Based on the balanced CIP/Res. Increase scenario above, the Board of Assessors has calculated the following tax rates. The following FY2023 rates do not account for the means-tested exemption.

<u>Property Class</u>	<u>FY2022</u>	<u>FY2023</u>
Residential	18.05	15.71
Commercial	24.57	20.22
Industrial	24.57	20.22
Personal Property	24.57	20.22

Tax Impacts

The average residential tax bill calculation would change as follows if a CIP shift factor of 1.26 were adopted:

	Average
	Single-Family Value
Fiscal Year 2022	\$801,628
FY22 Tax Rate	\$18.05
RE Tax Payable	\$14,469
Fiscal Year 2023	\$956,956
FY23 Tax Rate	\$15.71
RE Tax Payable	\$15,033
Avg. SF Home Value Incr.	19.5%
Avg. Dollar Tax Increase	\$564
% Tax Increase	3.9%

	Median
	Single-Family Value
Fiscal Year 2022	\$740,500
FY22 Tax Rate	\$18.05
RE Tax Payable	\$13,366
Fiscal Year 2023	\$871,000
FY23 Tax Rate	\$15.71
RE Tax Payable	\$13,683
Med. SF Home Value Incr.	17.6%
Med. Dollar Tax Increase	\$317
% Tax Increase	2.37%

The Board of Assessors point out that a CIP shift factor of 1.26 with a corresponding residential shift factor of 0.9789 would result in a “relatively” uniform tax rate increase in both sectors.

Sudbury's Tax Shift Votes (15 Year History)

Fiscal Year	CIP Value	Total Value	R/O % of Total Value	CIP % of Total Value	Lowest Residential Factor Allowed	Max CIP Shift Allowed	Residential Factor Selected	CIP Shift
2008	270,083,278	4,162,959,799	93.5122	6.4878	0.965310	1.500000	0.981268	1.26999
2009	278,781,214	4,064,434,979	93.1410	6.8590	0.963179	1.500000	0.982326	1.24000
2010	284,018,864	4,003,661,467	92.9060	7.0940	0.961822	1.500000	0.982438	1.23000
2011	274,711,172	3,874,281,828	92.9094	7.0906	0.961841	1.500000	0.978631	1.28000
2012	271,556,419	3,838,335,540	92.9251	7.0749	0.961932	1.500000	0.978938	1.27664
2013	273,337,212	3,864,083,107	92.9262	7.0738	0.961939	1.500000	0.978714	1.27963
2014	265,094,234	3,960,584,137	93.3067	6.6933	0.964132	1.500000	0.974606	1.35400
2015	263,058,002	4,088,915,905	93.5666	6.4334	0.965621	1.500000	0.973663	1.38304
2016	277,216,608	4,230,884,307	93.4478	6.5522	0.964942	1.500000	0.973356	1.38000
2017	280,876,280	4,408,953,695	93.6294	6.3706	0.965980	1.500000	0.974145	1.37999
2018	308,262,538	4,560,675,215	93.2409	6.7591	0.963754	1.500000	0.976078	1.33000
2019	331,554,958	4,728,363,583	92.9880	7.0120	0.962296	1.500000	0.975100	1.33021
2020	321,263,656	4,773,073,156	93.2692	6.7308	0.963917	1.500000	0.976300	1.32842
2021	335,996,650	4,812,305,728	93.0180	6.982	96.2470	1.500000	0.975230	1.33001
2022	393,863,578	5,198,464,866	92.4235	7.5765	.959012	1.500000	0.972900	1.33000

Voting a Tax Shift Factor

If the Select Board were to balance the impact of the tax increase equally between CIP and Residential, the Board would vote as follows: The Select Board of Sudbury votes in accordance with M.G.L., Ch. 40, Sec. 56, as amended, the percentage of local tax levy which will be borne by each class of real and personal property, relative to setting the Fiscal Year 2023 tax rates and sets the Residential Factor at 0.9789, (or other selected Factor) with a corresponding CIP shift of 1.26 (or other corresponding CIP shift), pending certification of the Town's annual tax recap by the Massachusetts Department of Revenue.

Optional Exemptions:

Residential Exemption:

Adopting the Residential Exemption (conferred pursuant to M.G.L. c. 59, § 5C) would allow the Select Board to exempt from qualified residential properties a percentage of the average assessed value for the class. The intent of this exemption is to promote owner occupancy. The residential exemption has the effect of shifting the tax burden from the lower valued properties to higher valued properties, and those, which are not owner-occupied.

An exemption of up to 35% of the average assessed value for Class I (Residential) properties is possible. If adopted a flat, uniform valuation reduction is applied to all qualifying owner-occupied residential home valuations. The tax levy in the community does not change based on adoption of this exemption. However, to compensate for the loss in residential valuation associated with this exemption, the residential tax rate increases. The exemption will reduce property taxes on the lower valued owner-occupied residential properties, while increasing property taxes on higher valued properties, and those residential properties, which are not owner-occupied.

In FY 2022, sixteen Massachusetts cities and towns adopted the Residential Exemption. Historically, the exemption has been adopted in those communities with a high percentage of apartments and other investment property or seasonal homes. In general terms, the exemption shifts real estate taxes onto Class I properties that are not occupied as the owner's principal residence and those which may be held for investment.

Residential Exemption Communities	
Boston	35%
Somerville	35%
Waltham	35%
Cambridge	30%
Chelsea	35%
Malden	30%
Everett	25%
Nantucket	25%
Provincetown	25%
Watertown	30%
Brookline	21%
Barnstable	20%
Truro	25%
Wellfleet	25%
Tisbury	18%
Oak Bluffs	4%

Small Commercial Exemption

An exemption (conferred pursuant to M.G.L. c. 59, § 5I) of up to 10% of the property valuation can be granted to commercial properties (not industrial) having one or more businesses employing 10 or fewer employees in total, and an assessed value of less than \$1,000,000. Implementing this exemption requires increasing the CIP tax rate to offset lost revenues from qualifying properties.

For fiscal year 2023, 55 properties in the Town have been identified as meeting qualifying standards. Sudbury's nominal commercial class for fiscal year 2023 hosts 188 accounts. In addition, there are 8-mixed use/part commercial, 40+-chapter land, and 19 industrial properties all of which would be subject to an increased tax rate generated by the adoption of a small commercial exemption. The class 3 value reduction for those qualifying properties if a 10% small commercial exemption is adopted equals \$2,409450.

The average tax savings for the 55 accounts (assuming a 1.26 shift) is approximately \$885.80 per account.

Considerations:

The qualifying 55 taxpayers will receive a tax benefit. Other small businesses (not qualifying) will bear the increased burden along with larger commercial and industrial properties. Many of the small businesses appearing on the Department of Unemployment Assistance (DET) list as qualifying will not benefit from the exemption, as they are tenants in larger commercial properties with assessed values exceeding the allowable \$1,000,000 cap. The vast majority of Sudbury's small businesses will not stand to benefit by adoption of this exemption, as they are tenants in strip malls, and other large commercial buildings. They in fact will be penalized with an increased tax rate.

Small Commercial Exemption Communities	
Auburn	10%
Avon	10%
Bellingham	10%
Berlin	10%
Braintree	10%
Chelmsford	10%
Dartmouth	10%
Erving	10%
New Ashford	10%
Seekonk	10%
Swampscott	10%
Westford	10%
Wrentham	10%
North Attleborough	5%

Open Space Exemption

In addition to the above-mentioned options, there is one more option, to discuss briefly since this exemption is not applicable in Sudbury at this time. It is known as the Open Space Exemption. In order for a municipality to utilize an open space exemption, the community must first have adopted the Open Space Class. While most residential land is Class 1, there is an additional classification which may be created for some vacant land (Class 2). The definition of open space in this context is: *land which is not otherwise classified and which is not taxable under provisions of chapters 61, 61A or 61B, or taxable under a permanent conservation restriction, and which land is not held for the production of income but is maintained in an open or natural condition and which contributes significantly to the benefit and enjoyment of the public.*

The Open Space Class was developed to provide a tax break to landowners, as incentive to preserve open land or at least slow development. Adopting this classification would result in a discount of the residential tax obligation of up to 25% for those parcels classified as open space. Any tax savings awarded to open space property owners will be subsidized by all other residential property owners. Commercial, Industrial, and Personal Property will not be affected. Sudbury currently has 63 parcels of land enrolled in the various chapter land programs. Chapter land enrollment carries certain program withdrawal restrictions which are described below. If a community were to adopt this open space classification, any property classified as open space (*not enrolled in chapter land programs*) would receive the benefit of the favorable tax structure without any of the restrictions associated with the existing chapter land programs. Implementation of the Open Space Classification would take up to a year following written request of the Select Board.

Classified Land - Chapters 61, 61A and 61B

There are three “Chapter Land” programs available: Forestry (M.G.L. Chapter 61), Agriculture / Horticulture (M.G.L. Chapter 61A), and Recreation (M.G.L. Chapter 61B).

Chapter 61 - Forestry Land is designed to encourage the preservation and enhancement of the Commonwealth’s forests. A parcel must consist of at least 10 contiguous acres of land under the same ownership and be managed under a 10-year management plan approved and certified by the State Forester in order to qualify for and retain classification as forest land under Chapter 61.

Chapter 61A - Agricultural and Horticultural Land is designed to encourage the preservation of the Commonwealth's valuable farmland and promote active agricultural and horticultural land use. The property must consist of at least 5 contiguous acres of land under the same ownership

and be "actively devoted" to agricultural or horticultural use in order to qualify for and retain classification as agricultural or horticultural land under Chapter 61A. An equal amount of contiguous non-productive land may also qualify for classification.

For the land to be considered "actively devoted" to a farm use, it must have been farmed for the two years prior to the year of classification and must have produced a certain amount of sales. The minimum gross sales requirement is \$500 for the first 5 acres of productive land being classified.

Chapter 61B - Recreational Land is designed to encourage the preservation of the Commonwealth's open space and promote recreational land uses. Property must consist of at least 5 contiguous acres of land under the same ownership in order to qualify for and retain classification as recreational land under Chapter 61B. The land must fall into **one** of the following two categories to qualify:

It must be maintained in a substantially natural, wild or open condition or must be maintained in a landscaped condition permitting the preservation of wildlife and natural resources. It does not have to be open to the public, but can be held as private, undeveloped, open space land.

Liens

Once an initial application for classification has been approved, the local assessors will record a statement at the Registry of Deeds indicating that the land has been classified as forestry under Chapter 61, agricultural / horticultural land under Chapter 61A or recreational land under Chapter 61B. The statement will constitute a lien on the land for all taxes due under the respective chapters.

Municipal Option to Purchase

The city or town has an option to purchase any classified land whenever the owner plans to sell or convert it to a residential, commercial, or industrial use. The owner must notify by certified mail the selectmen, assessors, planning board and conservation commission of the town of any intention to sell or convert the land to those uses. If the owner plans to sell the land, the town has the right to match a bona fide offer to purchase it. If the owner plans to convert it, the city or town has the right to purchase it at its fair market value, which is determined by an impartial appraisal. The city or town may also assign its option to a non-profit, conservation organization. The owner cannot sell or convert the land until at least 120 days have passed since the mailing of the required notices or until the owner has been notified in writing that the option will not be exercised, whichever is earlier.

Withdrawal Tax

With each of these programs, there is a conveyance tax penalty for withdrawing land. Whenever land which is valued, assessed and taxed under this chapter no longer meets the definition of forest land, agricultural /horticultural land, or recreational land it shall be subject to additional taxes, called roll-back taxes, in the tax year in which it is disqualified and in each of the four immediately preceding tax years in which the land was so valued, assessed and taxed. For each tax year, the roll-back tax shall be an amount equal to the difference, if any, between the taxes paid or payable for that tax year in accordance with this chapter and the taxes that would have been paid or payable in that tax year had the land been valued, assessed and taxed without regard to these provisions.

A summary of Sudbury’s use of the Chapter Land programs follows.

Program	Number of Properties	Total No. of Acres Enrolled	Average Acres Per Property
Agriculture/Horticulture	48	658.73	15.32
Forestry	5	12.55	2.51
Recreation	10	271.15	27.11
Totals	63	942.43	14.95

Bedford, which was the sole community in Massachusetts to utilize the Open Space Classification, discontinued that Classification in 2017. They attribute their decision to the fact that a very small number of parcels representing a small fraction of the Town’s value qualified for this classification.

In Sudbury, the vast majority of the Town’s taxable large land tracts are currently enrolled in at least one of the Special Chapter Land Programs conferred under M.G.L. Chapter 61, 61A and 61B.

As shown above, we currently have 63 parcels of land enrolled in the Special Chapter land programs representing just under 950 acres.

Although there is a tax benefit associated with Chapter land program enrollment, there are also associated program withdrawal implications. One of the associated implications is the municipality’s right to purchase the property should it become available for sale. In addition, there is a property tax recapture period when the property is withdrawn from its special classification whereby the municipality can recoup some of the lowered taxes.

There are no such restrictions or implications associated with the Open Space Classification designation. An owner is not restricted in developing or selling the property; the open space tax benefit would simply end.

By comparison with the chapter land programs, summarized below is the vacant land NOT in a chapter land program.

Vacant Land Summary						
Land Type	Land Use Code	Number	Acres	Assessed Value	Average Assessed Value	
					Per Property	Per Acre
Residential Land	130	38	118	16477400	433615	139638
Residential Land (Secondary)	131	8	18	2285800	285687	126988
Residential Land (Unusable)	132	314	620	4559100	14519	7353
Totals		360	756	23322300		

The town's current wetlands pricing of \$500/acre and residual land pricing of \$20,000/acre are also significant when considering adoption of the Open Space classification. Implementation of the Classification takes up to a year following written request of the Select Board.

VOTING THE EXEMPTIONS

Example Motions/Vote(s): Residential and Small Commercial Exemption Options:

This language including negative and affirmative options speaks to the Residential Exemption:

Motion: [Not] to adopt a Residential Exemption for Fiscal Year 2023, or

Motion: [To] adopt a Residential Exemption for Fiscal Year 2023 of ____% of the Average of all Residential Value for those eligible residential properties, which will shift the burden within the Residential Class.

This language including negative and affirmative options speaks to the Small Commercial:

Motion: [Not] adopt the Small Commercial Exemption for Fiscal Year 2023, or

Motion: [To] adopt the Small Commercial Exemption for Fiscal Year 2023 business (as) on the DET list valued at less than \$1 million, which will shift the burden within the Commercial & Industrial Classes.

The Open Space exemption cannot presently be implemented, and therefore, no vote need be taken by the Select Board with respect to this exemption.

ADDENDUM A

SUDBURY'S MEANS TESTED SENIOR TAX EXEMPTION

Finally, we are asking this evening that the Board vote on the cap to be used to fund the Sudbury Senior Means Tested Exemption Program for Fiscal year 2023. Section 3 of Chapter 169 of the Acts of 2012, specifies that the total cap on the exemptions granted by the act shall be set annually by the Select Board, within a range of .5 to 1 per cent of the residential property tax levy for the town of Sudbury. The vote is traditionally taken following the mandatory Classification Hearing votes.

Massachusetts Chapter 169 of the Acts of 2012 established, and Chapter 10 of the Acts of 2016 renewed a pilot program in Sudbury for granting certain qualified senior residents a measure property tax relief. Fiscal year 2023 is the tenth year of the program. The exemption is similar to the Residential Tax Exemption in that it shifts the tax burden from qualified residential property owners to other residential property owners. For Fiscal year 2014, the statute limited the total exemptions granted under the pilot program to a dollar cap equal to 0.5% of the residential levy (after any CIP shift). For Fiscal year 2022, the Select Board voted to increase the cap to 0.5189%.

For fiscal year 2023, Select Board have the option, if needed, to increase this percentage up to and including 1.0%.

Applications are required, and the Assessors administer this program for all applicants deemed qualified by the Board of Assessors. For fiscal year 2023, the Assessors received 82 applications and the Board of Assessors identified 82 applicants tentatively qualified to receive the exemption. In order for the Assessors to complete the necessary calculations, Select Board must first vote the Residential Factor and CIP shift values for fiscal year 2023 at the Classification Hearing. That vote will determine a tentative residential tax rate, which will then be used in the calculations and result in an increase in the tentative residential tax rate.

For fiscal year 2023, the indicated need seems to point to a cap on the percentage of residential tax levy required to fund the program may be approximately the same as last year. Our calculations indicate the cap on the exemption percentage of the residential tax levy of .5% should be sufficient to fund the program for Fiscal year 2023. The exact percentage will be based upon the voted residential factor.

The Act also provides an alternative to increasing the cap, whereby the income threshold may be adjusted above the nominal 10.0% until the need is reduced to fall within the cap.

Suggested Motion:

Vote in accordance with Chapter 169 of the Acts of 2012, the total FY2023 cap on the exemptions granted by the Means Tested Senior Tax Exemption shall be .5% (**half of one percent**) of the residential property tax levy.

Addendum B - More Tax Rate Options

CIP Shift	Res Factor	Res ET	Comm ET
1.0000	1.0000	16.05	16.05
1.0100	0.9992	16.03	16.21
1.0200	0.9984	16.02	16.37
1.0300	0.9976	16.01	16.53
1.0400	0.9968	15.99	16.69
1.0500	0.9959	15.98	16.85
1.0600	0.9951	15.97	17.01
1.0700	0.9943	15.96	17.17
1.0800	0.9935	15.94	17.33
1.0900	0.9927	15.93	17.49
1.1000	0.9919	15.92	17.65
1.1100	0.9911	15.90	17.81
1.1200	0.9903	15.89	17.97
1.1300	0.9895	15.88	18.13
1.1400	0.9887	15.86	18.29
1.1500	0.9878	15.85	18.45
1.1600	0.9870	15.84	18.61
1.1700	0.9862	15.83	18.78
1.1800	0.9854	15.81	18.94
1.1900	0.9846	15.80	19.10
1.2000	0.9838	15.79	19.26
1.2100	0.9830	15.77	19.42
1.2200	0.9822	15.76	19.58
1.2300	0.9814	15.75	19.74
1.2400	0.9805	15.73	19.90
1.2500	0.9797	15.72	20.06
1.2600	0.9789	15.71	20.22
1.2700	0.9781	15.70	20.38
1.2800	0.9773	15.68	20.54
1.2900	0.9765	15.67	20.70
1.3000	0.9757	15.66	20.86
1.3100	0.9749	15.64	21.02
1.3200	0.9741	15.63	21.18
1.3300	0.9733	15.62	21.34
1.3400	0.9724	15.60	21.50
1.3500	0.9716	15.59	21.66
1.3600	0.9708	15.58	21.82
1.3700	0.9700	15.57	21.98

1.3800	0.9692	15.55	22.14
1.3900	0.9684	15.54	22.31
1.4000	0.9676	15.53	22.47
1.4100	0.9668	15.51	22.63
1.4200	0.9660	15.50	22.79
1.4300	0.9651	15.49	22.95
1.4400	0.9643	15.47	23.11
1.4500	0.9635	15.46	23.27
1.4600	0.9627	15.45	23.43
1.4700	0.9619	15.44	23.59
1.4800	0.9611	15.42	23.75
1.4900	0.9603	15.41	23.91
1.5000	0.9595	15.40	24.07

Attachment5.a: FY 2023 Classification Hearing (5601 : Annual Tax Classification hearing (cont from 11/29))

ADDENDUM C

COMMERCIAL TAX HISTORY

9 Year Commercial Tax History

	2022	2021	2020	2019	2018	2017	2016	2015	2014
Residential Factor (Vote)	0.9729	0.9752	0.9763	0.9751	0.9761	0.9741	0.9734	0.9737	0.9746
CIP Shift (Vote)	1.33	1.33	1.33	1.33	1.33	1.38	1.38	1.38	1.35
Single Tax Rate (Calculate)	18.47	19.21	18.8	18.27	18.27	18.12	18.19	17.99	18.42
CIP Tax Rate following Shift (Vote)	24.57	25.55	24.97	24.3	24.3	25.01	25.11	24.88	24.94
Residential Tax Rate following Shift including Senior Means	18.05	18.83	18.45	17.91	17.93	17.74	17.8	17.6	18.03
Small Commercial Exemption (Vote)	No	No	No	No	No	No	No	No	No
Residential Exemption (Vote)	No	No	No	No	No	No	No	No	No
Open Space Classification (Vote)	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
Average All Residential (not just SFR)	761,788	710,074	708,436	703,602	679,625	660,704	634,923	616,378	598,557
Average Nominal Commercial Value	1,090,362	968,017	906,245	951,245	862,037	817,572	773,195	746,102	743,816
Nominal Commercial Value	204,988,100	183,923,300	170,374,100	179,785,300	163,787,100	152,885,900	145,360,600	138,774,900	138,349,700
Nominal Commercial Property Count	188	190	188	189	190	187	188	186	186
*SMTE Program utilizes the traditional residential exemption module to calculate the tax impact due to the exemption									

Attachment5.a: FY 2023 Classification Hearing (5601 : Annual Tax Classification hearing (cont from 11/29))

ADDENDUM D

OVERLAY

Approximate (not certified) Overlay balance \$1,385,365. This does not include potential liability.

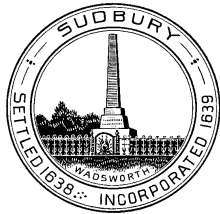
ADDENDUM E

Massachusetts Communities Tax Shift Changes from FY 2022 to FY 2023

Municipality	Total Value	R/O % of Total Value	CIP % of Total Value	Lowest Residential Factor Allowed	Max CIP Shift Allowed	Residential Factor Selected	CIP Shift	Change From Last Year
Attleboro	6,311,055,936	84.8254	15.1746	0.910554	1.500000	0.932021	1.38000	increased shift from 1.35
Auburn	2,859,227,121	75.7758	24.2242	0.840159	1.500000	0.961638	1.12000	increased shift from 1.15
Belchertown	1,975,278,128	93.0998	6.9002	0.962942	1.500000	1.000000	1.00000	no change
Berlin	846,161,427	81.9937	18.0063	0.835296	1.500000	0.890000	1.49241	slight increase from 1.48
Brewster	5,807,261,160	94.8823	5.1177	0.973031	1.500000	1.000000	1.00000	no change
Brimfield	565,500,918	89.2732	10.7268	0.939921	1.500000	1.000000	1.00000	no change
Cambridge	71,139,912,521	52.6660	47.3340	0.650000	1.500000	0.650000	1.38943	decrease from 1.45
Carlisle	2,109,050,102	98.1779	1.8221	0.990720	1.500000	1.000000	1.00000	no change
Charlton	2,425,025,145	77.9099	22.0901	0.858232	1.500000	1.000000	1.00000	no change
Chatham	9,917,611,890	94.3516	5.6484	0.970067	1.500000	1.000000	1.00000	no change
Cheshire	395,041,816	90.2871	9.7129	0.946210	1.500000	1.000000	1.00000	no change
Chicopee	5,122,811,192	79.5605	20.4395	0.807321	1.750000	0.807400	1.74969	decrease slightly from 1.75
Cohasset	3,736,093,718	93.5813	6.4187	0.965705	1.500000	1.000000	1.00000	no change
Colrain	204,167,565	84.5519	15.4481	0.908647	1.500000	1.000000	1.00000	no change
Conway	320,325,906	85.8276	14.1724	0.917437	1.500000	1.000000	1.00000	no change
Dennis	10,889,719,150	94.2572	5.7428	0.969537	1.500000	1.000000	1.00000	no change
Douglas	1,429,972,887	93.8116	6.1884	0.967017	1.500000	1.000000	1.00000	no change
Dover	2,989,656,978	97.0330	2.9670	0.984711	1.500000	1.000000	1.00000	no change
East Bridgewater	2,369,276,570	89.8253	10.1747	0.943363	1.500000	1.000000	1.00000	no change
Eastham	4,239,249,580	96.8705	3.1295	0.983846	1.500000	1.000000	1.00000	no change
Fairhaven	2,900,600,435	86.2367	13.7633	0.880300	1.750000	0.880300	1.75000	no change
Fall River	8,609,122,793	81.8310	18.1690	0.833476	1.750000	0.833500	1.74990	no change
Georgetown	1,815,236,481	90.7440	9.2560	0.948999	1.500000	1.000000	1.00000	no change
Grafton	3,401,272,691	90.7455	9.2545	0.949008	1.500000	1.000000	1.00000	no change
Granville	248,275,500	82.5014	17.4986	0.893950	1.500000	1.000000	1.00000	no change
Great Barrington	1,860,810,837	81.5635	18.4365	0.886980	1.500000	1.000000	1.00000	no change
Halifax	1,287,857,930	91.4975	8.5025	0.953536	1.500000	1.000000	1.00000	no change
Hancock	341,535,755	57.5396	42.4604	0.650000	1.500000	1.000000	1.00000	no change
Holden	3,202,304,590	95.1564	4.8436	0.974549	1.500000	1.000000	1.00000	no change
Holland	476,752,896	96.5890	3.4110	0.982343	1.500000	1.000000	1.00000	no change
Lee	1,236,219,971	69.7881	30.2119	0.783545	1.500000	1.000000	1.00000	no change
Mansfield	4,983,785,160	78.1178	21.8822	0.859941	1.500000	0.935600	1.22990	increase from 1.18
Merrimac	1,157,161,763	96.2115	3.7885	0.980311	1.500000	1.000000	1.00000	no change
Middleborough	3,817,420,032	83.2988	16.7012	0.899751	1.500000	0.989975	1.05000	no change
Millis	4,654,251,337	80.9202	19.0798	0.823160	1.750000	0.863200	1.58019	minimal increase from 1.58009
Millis	1,782,301,652	90.6747	9.3253	0.948578	1.500000	1.000000	1.00000	no change
Monson	1,033,036,436	89.7030	10.2970	0.942605	1.500000	1.000000	1.00000	no change
Monterey	607,342,608	96.1065	3.8935	0.979743	1.500000	1.000000	1.00000	no change
Mount Washington	98,378,909	96.7058	3.2942	0.982968	1.500000	1.000000	1.00000	no change
Nahant	1,270,647,951	96.1896	3.8104	0.980193	1.500000	1.000000	1.00000	no change
New Ashford	51,765,978	84.8950	15.1050	0.911037	1.500000	1.000000	1.00000	no change
Newbury	2,216,935,247	95.5994	4.4006	0.976984	1.500000	1.000000	1.00000	no change
Norfolk	2,366,260,788	93.1093	6.8907	0.962996	1.500000	1.000000	1.00000	no change
North Andover	7,021,739,642	83.5835	16.4165	0.901795	1.500000	0.937100	1.32025	minimal increase from 1.32
North Attleborough	5,150,532,060	84.7203	15.2797	0.909822	1.500000	0.969300	1.17022	increase to 1.18
Northbridge	2,365,257,590	87.4450	12.5550	0.928212	1.500000	1.000000	1.00000	no change
Northfield	637,954,765	56.2861	43.7139	0.650000	1.500000	1.000000	1.00000	no change
Norton	3,458,635,250	81.0634	18.9366	0.883199	1.500000	0.988319	1.05000	no change
Pembroke	3,811,246,043	88.5828	11.4172	0.935556	1.500000	1.000000	1.00000	no change
Pepperell	1,785,854,458	94.4384	5.5616	0.970554	1.500000	1.000000	1.00000	no change
Provincetown	4,494,390,650	86.0751	13.9249	0.919111	1.500000	1.000000	1.00000	no change
Russell	203,302,475	84.9542	15.0458	0.911448	1.500000	1.000000	1.00000	no change
Sandisfield	298,556,698	87.2370	12.7630	0.926849	1.500000	1.000000	1.00000	no change
Seekonk	3,102,590,749	79.2309	20.7691	0.803400	1.750000	0.803400	1.75000	no change
Sharon	4,366,348,300	92.2119	7.7881	0.957770	1.500000	1.000000	1.00000	no change
Sheffield	878,490,340	85.8681	14.1319	0.917711	1.500000	1.000000	1.00000	no change
Shrewsbury	7,862,947,514	88.8969	11.1031	0.937550	1.500000	1.000000	1.00000	no change
Southborough	3,241,019,768	82.8284	17.1716	0.896342	1.500000	1.000000	1.00000	no change
Sturbridge	1,609,896,953	84.3886	15.6114	0.907503	1.500000	1.000000	1.00000	no change
Templeton	1,001,237,269	92.3690	7.6310	0.958693	1.500000	1.000000	1.00000	no change

Tolland	220,666,370	87.0673	12.9327	0.925731	1.500000	1.000000	1.000000	no change
Topsfield	1,802,348,188	93.2113	6.7887	0.963584	1.500000	1.000000	1.000000	no change
Truro	3,080,431,580	94.8457	5.1543	0.972827	1.500000	1.000000	1.000000	no change
Ware	980,242,847	85.4578	14.5422	0.914916	1.500000	1.000000	1.000000	no change
Wareham	4,884,866,617	85.1015	14.8985	0.912466	1.500000	1.000000	1.000000	no change
Wellfleet	3,517,230,150	95.9017	4.0983	0.978632	1.500000	1.000000	1.000000	no change
Westford	6,154,315,654	88.9001	11.0999	0.937570	1.500000	1.000000	1.000000	no change
Westhampton	262,527,107	94.3023	5.6977	0.969790	1.500000	1.000000	1.000000	no change
Whitman	2,237,740,909	89.6903	10.3097	0.942526	1.500000	1.000000	1.000000	no change
Williamstown	1,206,320,097	89.3863	10.6137	0.940630	1.500000	1.000000	1.000000	no change
Windsor	136,944,811	86.9608	13.0392	0.925028	1.500000	1.000000	1.000000	no change
Yarmouth	8,932,644,275	92.0098	7.9902	0.956580	1.500000	1.000000	1.000000	no change

Attachment5.a: FY 2023 Classification Hearing (5601 : Annual Tax Classification hearing (cont from 11/29))



TOWN OF SUDBURY

Office of Select Board

www.sudbury.ma.us

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Email: selectboard@sudbury.ma.us

**TOWN OF SUDBURY
PUBLIC HEARING
ATTENTION: TAXPAYERS**

In accordance with General Laws Ch. 40, sec. 56, as amended, the Sudbury Select Board will hold a public hearing on Tuesday, November 29, 2022, at 7:15 p.m. remotely via Zoom teleconference, to determine what percentage of the local tax levy will be borne by each class of real and personal property relative to setting the Fiscal Year 2023 tax rate.

The first policy decision of the Select Board will be to determine the Residential Factor, which means the percentage of the tax levy to be borne by residential property. The Residential Factor determines how different tax rates for residential, commercial and industrial properties will be established. A Residential Factor of 1 means that the local tax rate will be a single rate uniformly applied to all properties. The other options to be considered are whether or not to allow a residential property exemption, a small commercial exemption, and a discussion of the open space exemption. In addition to the above, there will be some discussion regarding Sudbury’s senior residential tax exemption with respect to the program’s estimated total cost and impact on the residential tax rate for Fiscal Year 2023.

At this public hearing, the Board of Assessors will provide all information and data relevant to helping the Select Board make a determination of a single or multiple tax rates and the fiscal effect of the available alternatives to taxpayers. Taxpayers may present oral or written information on their views prior to or at the public hearing.

SUDBURY SELECT BOARD

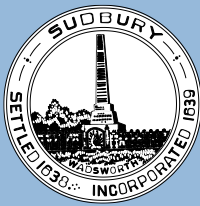
- Charles G. Russo, Chair
- Janie W. Dretler, Vice-Chair
- Daniel E. Carty
- Lisa V. Kouchakdjian
- Jennifer S. Roberts

For publication *MetroWest Daily News* 11-15-22, 11-22-22

- cc: Board of Assessors
- Finance Director
- Town Accountant
- Chamber of Commerce

- Finance Committee
- Council on Aging Director
- Assistant Town Manager
- Town Clerk

Attachment5.b: TAX CLASSIFICATION HRG 2022 (5601 : Annual Tax Classification hearing (cont from 11/29))



SUDBURY SELECT BOARD

Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

6: Town Accountant appointment

REQUESTOR SECTION

Date of request:

Requestor: Dennis Keohanne, Finanace Director

Formal Title: Meet with candidate Laurie Dell'Olio and approve this proposed appointment as Town Accountant.

Recommendations/Suggested Motion/Vote: Meet with candidate Laurie Dell'Olio and approve this proposed appointment as Town Accountant.

Background Information:

Christine Nihan, current Town Accountant, is retiring at the end of calendar year 2022. attached memo from Dennis Keohane

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM

MEMORANDUM

TO: Select Board

CC: Maryanne Bilodeau, Interim Town Manager

FROM: Dennis Keohane, Finance Director

DATE: December 6, 2022

RE: Appointment Request for Town Accountant

Vote Request

To approve the appointment of Laurie A. Dell'Olio as Town Accountant for an indefinite term of office beginning on or about December 28, 2022, as recommended by Finance Director Dennis Keohane, to fill the vacancy to be created by the retirement of Christine Nihan.

For your consideration

Laurie is a finance professional with twenty-five years of experience, of which approximately 19 have been spent working in municipal accounting. Currently she is working to provide outsourced accounting services for 8 Massachusetts communities and previously served for 13 years as the Town Account for Lexington.

Laurie's appointment is further recommended by Maryanne Bilodeau, Interim Town Manager, as well as Christine Nihan, current Town Accountant, who were both involved in the interview process. She comes to us with a very desirable combination of experience, skills, personality and work ethic. I am very pleased to bring forth her candidacy to the Select Board for consideration and I am confident that Laurie will be a welcomed addition to Sudbury's Finance team.

LAURIE A. DELL'OLIO

[REDACTED]

[REDACTED]

[REDACTED]

PROFESSIONAL EXPERIENCE:

MELANSON CPA'S, Merrimack, NH

MUNICIPAL OUTSOURCE DIVISION, Senior Accountant, December 2019 - present

- Manage the Municipal Outsource Division
- Provide town accountant services to 8 towns with a 4-support staff.

TOWN OF LEXINGTON, Lexington, MA

Town Accountant, September 2004 - September 2017

- Responsible for planning, directing, and controlling all financial and accounting policies and procedures for the Town
- Assist in developing the \$190 million-dollar annual town budget
- Prepare annual financial statements for the Town
- Oversee annual financial audits
- Supervise accounting staff and oversee weekly payroll and accounts payable processing

Staff Accountant, July 2001 - September 2004

- Process annual and monthly closings
- Reconcile town funds and accounts
- Assisted in the conversion of a new accounting software, MUNIS
- Trained entire staff on new software and continue to troubleshoot all modules which include: general ledger, payroll, benefits, purchasing, accounts payable and budget

WHDH-TV, INC, Boston, MA

Business Manager - News, September 2000 - July 2001

- Managed the financial affairs of the News Department
- Assisted in preparing an \$18 million-dollar annual budget
- Prepared financial statements and budget variance reports for superiors
- Coordinated travel arrangements for News crews

ROWE DESIGN GROUP. Architects & Engineers

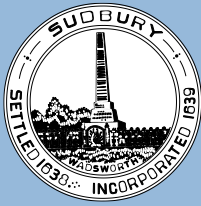
WATERSTREET BUILDERS. Construction & Design, Arlington, MA

Business Manager/Property Manager, December 1997 - September 2000

- Managed all aspects of two small businesses including; accounts payable, accounts receivable, billing, payroll, and employee benefits
- Prepared annual and monthly financial statements for planning and budgeting
- Managed multiple commercial properties and processed all financial data

EDUCATION:

Northeastern University, Bachelor of Science, Management



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

7: Town Manager contract

REQUESTOR SECTION

Date of request:

Requestor: Chair Russo

Formal Title: Discussion and possible vote on whether to approve the Town Manager Contract between the Town of Sudbury and Andrew J. Sheehan, and ratify the vote taken in Executive Session.

Recommendations/Suggested Motion/Vote: Discussion and possible vote on whether to approve the Town Manager Contract between the Town of Sudbury and Andrew J. Sheehan, and ratify the vote taken in Executive Session.

Background Information:

Financial impact expected:

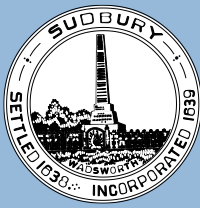
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

8: Interview new applicants for DEI

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Interview the following applicants for the Diversity, Equity and Inclusion Commission (DEI): Andrea C. Meggison (1 year term), Isabelle Li (1 year term), Kimberly Napoli (1 year term), Serena S. Hu (2 year term). Following interviews, vote to appoint candidates for terms as noted above.

Recommendations/Suggested Motion/Vote: Interview the following applicants for the Diversity, Equity and Inclusion Commission (DEI): Andrea C. Meggison (1 year term), Isabelle Li (1 year term), Kimberly Napoli (1 year term), Serena S. Hu (2 year term). Following interviews, vote whether to appoint applicants for terms as requested above.

Background Information:

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 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: Diversity, Equity and Inclusion

Name: Amy Arrigo

Address: 33 Lafayette Drive

Home phone: N/A Work or Cell phone: _____

Years lived in Sudbury: 7.5 year s

Brief resume of background and pertinent experience:
I am a Director of Talent Management for a mid-size insurance company where I lead talent and leadership strategic initiatives that are focused on driving change, I also am highly integrated into our inclusion, diversity and equity programs and our strategy to advance IDE in our company. Prior to this experience I spent 10 years in talent and organization consulting working with clients on major change initiatives, driving change and communication campaigns related to technology, organization models, process, etc.

Municipal experience (if applicable):
I have served on the Sudbury Education Resource Fund (SERF) Board for the past 2 years.

Educational background:
BS, Communication & Business - Cornell University
MS, Organization Dynamics - University of Pennsylvania

Reason for your interest in serving:
I have a passion for IDE and being a part of ideation and solutioning to advance progress in this area. I have leaned in personally, to better educate myself, but also in my professional work (as noted above) I have been leading initiatives to drive change in my own organization. I have two elementary school aged children in Sudbury, whom I am very conscious about bringing age appropriate discussions about IDE up with them. I want to continue to engage in this space and being part of this committee would be a great opportunity to extend further.

Times when you would be available (days, evenings, weekends):
Evenings would be best. I can be available on weekends, when planned ahead. Some day times would be possible but I'd need to schedule around my work schedule.

Do you or any member of your family have any business dealings with the Town? If yes, please explain:
No

AA (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 Amy Arrigo Date 01-23-2022

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Application Form

Profile

Andrea C Meggison
 First Name Middle Initial Last Name

[Redacted]
 Email Address

45 Powder Mill Road
 Home Address Suite or Apt

Sudbury MA 01776
 City State Postal Code

[Redacted] [Redacted]
 Primary Phone Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

1

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

I believe in the mission and would love to be a part of something positive in our community.

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I have never served on a commission so I don't really know what to expect. As a Hispanic woman, I can share my experience as a minority and learn from others as well.

Do you have previous municipal experience? If so, in what capacity have you served?

I have no previous municipal experience.

What is your educational background?

I have Master's Degree in Industrial and Organizational Psychology. DEI generally falls under this umbrella.

Not employed at this time _____
Employer Job Title

[Andrea C Meggison Resume 2022 V1.pdf](#)
Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.

[Redacted]

Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Andrea C Meggison

Andrea C. Meggison

Sudbury, MA |

OVERVIEW

Former Banking and lending professional with years of leadership experience. Key skills include coaching and development, process improvement, strategic planning, talent management, as well as collaborating on multi-dimensional and cross-channel business strategies and initiatives. Specialties include the use of industrial and organizational psychology techniques with an emphasis on data-driven decision making.

PROFESSIONAL EXPERIENCE

Ingram Marine Group

Organizational Development Intern

Nashville, TN

May-Aug 2018

- Customized and executed a communication plan for 13 action teams to gain accountability and set expectations on deliverables which increased reach by 40%.
- Created a master scorecard to track progress of 100+ actions items being implemented across the organization.
- Built a dashboard in Excel with integrated quantitative and qualitative data which allowed leadership teams to identify progress for 9 pillar initiatives on a micro- and macro-level.
- Evaluated and synthesized manager effectiveness survey data to identify development opportunities.
- Developed and conducted survey for existing mentorship program, then analyzed data and presented findings to Chief People Officer.

Asurion

Learning and Development Intern

Nashville, TN

May-Aug 2017

- Provided support and project management for Leadership Challenge initiative with the goal of implementing a culture shift.
- Cultivated organizational effectiveness team's change management goals by collaborating with colleagues in the Philippines on reinforcement activities, discussion of best practices and lessons learned.

Franklin American Mortgage

National Retail Operations Manager, Head of Operations, Vice President

Franklin, TN

2012 to 2013

- Oversaw operations of 3 large production centers, 15+ regional offices and multiple virtual teams.
- Developed and implemented business plans, operational procedures, and strategic plans to improve productivity in support of the long-term vision of the Retail Division's goals.
- Established and implemented plan to increase diversity and inclusion, reduce turnover, and increase employee tenure by 30%.
- Managed and provided coaching and development to 7 experienced mid-level managers emphasizing team building, strategic thinking, and performance management.

Retail Project Manager, Assistant Vice President

2010 to 2012

- Planned and executed various initiatives for loan origination, underwriting, secondary markets, operations, compliance, and quality control.
- Authored, reviewed, and communicated 100% of retail policy and procedure documentation.
- Partnered closely with the technology group to design and implement technical solutions.

CitiMortgage

Operations Manager, Assistant Vice President

Ann Arbor, MI

2001-2010

- Coached and supervised 30+ underwriters, customer service representatives and credit analysts.
- Formulated strategies to improve efficiency on call quality, underwriting and compliance defects.
- Directed workflow production to ensure satisfactory turn-times and high customer satisfaction.
- Led cross-functional teams designed to correct and prevent issues with the life of loan.

PROJECT EXPERIENCE

Middle Tennessee State University

Graduate Consultant

Murfreesboro, TN

2016-2018

- Worked on a team of graduate students to evaluate Nissan North America's Leadership Training programs by providing a gap analysis, benchmarking, and recommendations.
- In conjunction with a team of graduate students and the Tennessee Department of Human Resources, evaluated 360-degree survey responses for the LEAD TN program by participating in project management, data analysis, recommendations, report writing, and presentations.

Research Assistant for NASA Flight Operations Center – Unified Simulation Lab

2014-2017

- Catalogued and analyzed 5 years of quantitative and qualitative data to determine both team and individual improvement between high-fidelity flight simulations.
- Supported After Action Reviews following simulations which identified strengths and weakness of aviation students.
- Conducted statistical analyses including Factor Analysis and ANOVA using AMOS and SPSS for large sets of data.
- Imported sizeable quantities of survey measures into Qualtrics.

Research Assistant for Graduate Students

- Administered lengthy and arduous computerized performance measures of working memory and executive function.
- Facilitated subject study participation while complying with rigorous scientific standards and performing detailed data collection.

EDUCATION**Middle Tennessee State University***M.A in Industrial & Organizational Psychology**B.S Pre-Graduate Psychology, summa cum laude***Murfreesboro, TN***December 2020**May 2016***Honors & Awards:***Outstanding Scholastic Achievement and Excellence from PSI CHI International Honor Society in Psychology**Superior Academic Performance Award from the College of Behavioral and Health Sciences**Recipient of the Undergraduate Research Experience Creativity Activity Grant***SKILLS & INTERESTS****Skills:** Microsoft Office | SharePoint | SPSS | Qualtrics | Jira | Conversational Spanish**Interests:** Organizational Development, Process Improvement, Music, Cello, Reading, Strategy Board Games**COMMUNITY & PROFESSIONAL AFFILIATIONS****Boston Cares***Since 2022***Society for Industrial and Organizational Psychology***Since 2017***Society for Human Resource Management***Since 2016***American Psychological Association***Since 2014*

Application Form

Profile

Helen Huang
First Name Middle Initial Last Name

[Redacted]
Email Address

15 Hollow Oak Dr. Suite or Apt
Home Address

Sudbury MA 01776
City State Postal Code

[Redacted] [Redacted]
Primary Phone Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

25

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

I would like to contribute to the EDI as a member of minority group in Sudbury

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I served as board member for Chinese-American association of Sudbury in the past and recently was elected as a board member.

Do you have previous municipal experience? If so, in what capacity have you served?

No

What is your educational background?

MS

MCPHS university

Employer

Adjunct faculty

Job Title

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Helen Huang

Application Form

Profile

Kimberly _____ Napoli _____
First Name Middle Initial Last Name

Email Address

9 Spruce Ln _____
Home Address Suite or Apt

Sudbury _____ MA _____ 01776
City State Postal Code

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

3.5 years

Interests & Experiences

Please tell us about yourself and why you want to serve.

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Why are you interested in serving on this board or commission?

I am a Black mother of four kids (ages 2, 5, 11, and 12), three of which are in Sudbury Public Schools. We moved here in April 2019 from Boston's Roxbury neighborhood, which is the highest concentration of Black people in the state of Massachusetts. I was nervous to move to Sudbury as I knew that it would be significantly less diverse than that, and more like the town of Andover, MA (where I grew up). Having grown up in a town with little diversity, I am well aware of what impact that can have on a child and a family who is, or is not, in the minority - whatever the demographic. I have enjoyed my experience in Sudbury, thus far and was very happy to find the Sudbury Diversity and Equity Commission, and to connect with other diverse families. That there is a Commission within this town dedicated to the thoughtful consideration of diversity, equity, and inclusion (DEI) and to ensuring that DEI in Sudbury is approached and executed with meaningful intentionality is something I would love to be a part of.

Please describe your experience pertinent to this board/committee.

I am a Massachusetts licensed attorney with a background practicing labor and employment law. In that capacity I have become familiar with the issues stemming from lack of awareness around DEI through my representation of clients in claims of discrimination, harassment, retaliation and more. I have served as Director of Diversity, Equity, and Inclusion for New England Treatment Access, LLC and Vicente Sederberg LLP. Since 2017 I have served as Governor Charlie Baker's appointed expert in minority business development on the Massachusetts Cannabis Advisory Board (CAB). On the CAB I have twice served as Chair of the Market Participation Subcommittee, where our job is to ensure diversity, equity, and inclusion in the MA cannabis industry from minorities, women, veterans, differently abled, indigenous, and LGBTQ+ persons. I have won 2 individual champion awards (one for corporate social responsibility and a second for diversity and inclusion) since 2021.

Do you have previous municipal experience? If so, in what capacity have you served?

I was appointed to the Roxbury Strategic Master Plan Oversight Committee by Mayor Marty Walsh. I have been appointed 3 times to the MA Cannabis Advisory Board as Governor Baker's Expert in Minority Business Development. I served on Sudbury Superintendent Brad Cozier's Reopening Task Force.

What is your educational background?

I have a high school diploma (1999) from Presentation of Mary Academy (Methuen, MA). I have a Bachelor of Science in Sociology (2005) from Suffolk University College of Arts and Sciences (Boston, MA). I have a Juris Doctor (2015) from Suffolk University Law School (Boston, MA)

Self-Employed

Employer

Consultant

Job Title

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Kimberly Napoli

Application Form

Profile

Nadja _____ Lamaute _____
First Name Middle Initial Last Name

Email Address

16 Richard Ave _____
Home Address Suite or Apt

Sudbury _____ MA _____ 01776
City State Postal Code

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

1 year

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

To provide an equitable environment for all Sudbury residents.

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

-Two years cultural diversity and antibullying team leader NZ - One-year cultural diversity team member at Boston Public Schools (current member) - Bullying Lliasion at Boston Public Schools

Do you have previous municipal experience? If so, in what capacity have you served?

N/A

What is your educational background?

DPS, Doctorate in Educational Computing, Pace University MSN, Nursing, Ramapo College MBA, Iona College, MA, Education Administration Long Island University MA, Education, Iona College BS, Health Service Administration, Dominican College

Boston Public schools _____ Teacher _____
Employer Job Title

[_1_Dr.Lamaute_resume_Sud_1_.pdf](#)
Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Nadja Lamaute

Nadja Lamaute

EDUCATION PROFESSIONAL

A top-performing and highly energetic educator with a strong understanding of digital learning environments and data-driven instruction

PROFESSIONAL EXPERIENCE

BOSTON PUBLIC SCHOOLS, Boston, MA
SEI Science Instructor, 8/21-Present

Excel High School, Boston, MA
Bullying liaison, 8/22-Present

CARVER PUBLIC SCHOOLS, Carver, MA
Long-term substitute, 3/21-6-21

EAST RAMAPO CENTRAL SCHOOL DISTRICT, Spring Valley, NY
Instructor, 2000 to 2018

EAST RAMAPO CENTRAL SCHOOL DISTRICT, Spring Valley, NY
LPP Coordinator, 2016 to 2017

ROCKLAND COMMUNITY COLLEGE, Suffern, NY
Adjunct Biology Professor, 2008 to 2017

GOOD COUNSEL ACADEMY, White Plains, NY
Biology Teacher, 1998 to 2000

EDUCATION & CREDENTIALS

DPS, Doctorate in Educational Computing, Pace University, White Plains, NY, (2014)

MSN, Nursing, Ramapo College, Mahwah, NJ, (2014)

MBA, Human Resources, Iona College, New Rochelle, NY, (2006)

MA, Education Administration and Supervision, Long Island University, Orangeburg, NY, (2004)

MA, Education, Iona College, New Rochelle, NY, (1999)

BS, Health Service Administration, Dominican College, Orangeburg, NY, (1996)

AAS, Nursing, Rockland Community College, Suffern, NY, (1989)

AAS, Laboratory Technology, Rockland Community College, Suffern, NY, (1985)

Certification

NYS/NH School District Administrator

NYS/NH School Administrator and Supervisor

NYS/NH/MA Biology 7-12

NYS/NH/MA TESOL K-12

New York State Registered Nurse

PROFESSIONAL AFFILIATIONS & AWARDS

Upsilon Pi Epsilon Honor Society, 2012 | New York Academy of Science, 2012

Application Form

Profile

Nnenna _____ Uneke _____
 First Name Middle Initial Last Name

 Email Address

8 Eddy St _____
 Home Address Suite or Apt

Sudbury _____ MA _____ 01776
 City State Postal Code

 Primary Phone

 Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

9 years

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

Because I'm raising two Black children who are in SPS and can shed a light on how lack of diversity affects everything.

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I'm a Diversity Action Committee member at my job and also a DEI practitioner. I'm also a Licensed Mental Health Clinician(LMHC) and can shed a light on the lack of equity in mental health care and overall well-being practices.

Do you have previous municipal experience? If so, in what capacity have you served?

Not Municipal, but worked for the state of MA for 15 years

What is your educational background?

Masters in Counseling Psychology Certificate in Organizational Leadership.

Advocates, Inc
Employer

Director of Clinical Services
Job Title

[Nnenna Uneke resume.pdf.pdf](#)

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.

Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Nnenna Uneke

Nnenna Sylvie Uneke LMHC

Sudbury, MA

ABOUT ME

I am a psychotherapist with in-depth experience in social services, applying research-based and person-centered methodologies to drive inclusivity in healthcare, service and program delivery for diverse communities.

SKILLS & PROFICIENCIES

- Microsoft office
- Useresting.com
- Electronic Health Records Systems (EHRS)
- CRM
- In-depth interviews
- Focus groups
- Participatory design
- End-user feedback loops
- Qualitative survey

EDUCATIONAL BACKGROUND

Northwestern University
Organizational Leadership
Certificate Course via Coursera

Framingham State University
Framingham, MA
Master's Degree in Clinical Psychology

Ebonyi State University
Abakaliki, Nigeria
Bachelor's Degree in English Literature

WORK HISTORY

Advocates, Inc. Framingham, MA June 2020 to Present

Clinical Director, January 2022- Present

- Organize staff and staffing functions to provide appropriate and efficient client contact, services and satisfaction
- Ensure that the clinical integrity of client programs and services are maintained and conduct performance evaluations for all employees in programs as assigned
- Manage and streamline administrative processes and requirements in consultation with affiliated senior managers or designees
- Ensure that persons served are treated with dignity in accordance with Human Rights policies
- Manage and administer budgets for assigned programs and monitor and improve productivity.

Lead Intake /Outpatient Clinician, June 2020-January 2022

- Facilitate 80 initial in-depth client interviews with children, adults and families and allocate resources based on needs analysis
- Lead establishment of user-center outreach services across client demographics including age, ability and socioeconomic status

Program Manager

Center for Inclusive Excellence, Framingham State University, 2019 to 2020

- Conducted 60+ internal focus groups to codesign an inclusive environment among student leaders and staff
- *Managed budget of 60k, allocating funds to programming and center logistics*
- Lead department-wide content strategy including website and social media management
- Created programming to meet OKRs developed by executive stakeholders
- Delivered interactive training around psychoeducation including creating inclusive communities

Graduate Clinical Counseling Intern

Southborough Youth & Family Services, Southborough, MA 2019-2020

- Provided 250 individual counseling sessions utilizing client-centered therapeutic techniques
- Delivered personal development and social emotional skills workshops in schools
- Co-designed and facilitated 4 longitudinal counseling groups with various student groups
- Performed client intakes, clinical assessments, diagnoses and created treatment plans across all age groups

Benefits Eligibility & Referral Social Worker

Department of Transitional Assistance, Boston, MA 2009-2019

- Assessed cultural, language, and socio-economic barriers impacting employability and job readiness
- Interviewed clients and provided referrals for community resources to meet immediate needs
- Managed 1500 records and updated case information as needed while maintaining confidentiality
- Evaluated clients for benefits eligibility & ADA requests according to state guidelines

Survey Field Representative

US Census Bureau, New York, NY (intermittent) 2009-2015

- Electronically organized assigned areas to recruit households for ethnographic interviews
- Conducted in-depth interviews to elicit holistic health information following federal guidelines
- Maintained metadata of research conducted across 6 years and uploaded it to the Census Bureau main system weekly

Application Form

Profile

Pristine _____ Cyril _____
First Name Middle Initial Last Name

Email Address

49 Brimstone Ln _____
Home Address Suite or Apt

Sudbury MA 01776
City State Postal Code

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

6

Interests & Experiences

Please tell us about yourself and why you want to serve.

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Why are you interested in serving on this board or commission?

I am an active participant in my school's Racial Climate Task Force, currently holding the position, Class of 2024 Representative/Steering Committee Member. I am also doing Independent research on Racial Health Disparities a project (participatory action research) guided by Prof. Marva Richards, MPH, Albany Medical College. My involvement in the participatory action research has developed a deep passion for diversity equity and inclusion within me and am committed to build a more inclusive community where we live. I am also a volunteer at special olympics Massachussetts as a unified partner, play with special needs kids and teach them sports. As a student representative to DEI commission, i am hoping to be a connecting link between the diverse student community of my school and the town DEI commission. I believe this opportunity will help me develop the skills to do Anti-Racism work and create awareness of diversity, equity and inclusion.

Please describe your experience pertinent to this board/committee.

Class of 2024 Representative/Steering Committe for Racial Climate Rask Force. Student Senate Member elected by the student body (2 years); Committees: Cultural Celebration (Chair), Student Outreach, School Spirit. Independent Racial Health Disparities Research Project guided by Prof. Marva Richards, MPH, Albany Medical College. Dietary Aide at Bridges at Epoch. Assisted Memory Care Living, Sudbury.

Do you have previous municipal experience? If so, in what capacity have you served?

No

What is your educational background?

Junior, Lincoln Sudbury Regional High School

Bridges by EPOCH Memory
Care Assisted Living, Sudbury
Employer

Dietary Aide
Job Title

[Pristine_Cyril_Resume_.docx](#)

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Pristine Cyril

Pristine Cyril**49 Brimstone Ln, Sudbury, MA, 01776****Education:** Lincoln-Sudbury Regional High School, Sophomore**GPA:** 4.0/4.0 (High School average to date. School does not weight grades) **Test****Scores:** 1520 SAT score, 1420 PSAT score**Age:** 15 years**Extracurriculars**

High School's Racial Climate Task Force (RCTF): Class of 2024 Representative/Steering Committee Member (2nd year)	A school committee that addresses racial issues in the school and works to create a positive environment at the high school. Organized events, coordinated with school administration, advertised, and planned meetings/agendas.
High School Student Senate Member elected by the student body . Committees: Cultural Celebration (chair), Student Outreach, School Spirit	Freshmen: 20-21 Sophomore: 21-22 Helps organize events and works to address the needs of the student body and staff.
Independent Racial Health Disparities Research Project (participatory action research) guided by Prof. Marva Richards, MPH, Albany Medical College	Ongoing research that includes literature reviewing, reading books on the topic, and collecting data by interviewing POC in my community. Presented to the RCTF community group.
River's Youth Orchestra member: Youth Symphony	Violinist: past 3 years.
Boston Youth Symphony Orchestra: One of the country's leading youth orchestras.	Violinist: 21-22 season 22-23 session.
Science Olympiad	10 th grade: Placed 5 th in state in Anatomy & Physiology 8 & 9 th grade: Did not participate due to COVID. 7 th grade: placed first in state in both events (Heredity and Anatomy & Physiology)

High School Speech & Debate	Freshman year. Went to local, state, and national tournaments.
-----------------------------	--

Work Experience:

Dietary Aide at Bridges by EPOCH Memory Care Assisted Living, Sudbury	Since Oct. 2021 9 hours a week. Helps take care of dietary needs of residents.
Patient Care Assistant at UMASS memorial Hospital Marlborough.	Since Oct 2022.

Volunteer Experience:

Special Olympics	Year 21-22. On going. (Saturdays) Unified coach: Plays with special needs kids and teaches them sports.
Sudbury Youth in Philanthropy:	Member year 20-21 session. Learned about philanthropy and non-profit work and helped raise \$1,000 for two organizations.
Church Choir Member	4 years as violinist.
Boston Health Care for Homeless Program	Assisted with Bingo event. Currently organizing a sock drive.

Application Form

Profile

Serena _____ S _____ Hu _____
 First Name Middle Initial Last Name

 Email Address

31 Pelham Island Road _____
 Home Address Suite or Apt

Sudbury _____ MA _____ 01776 _____
 City State Postal Code

 Primary Phone

 Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

2 Years

Sudbury Residency

Years Lived in Sudbury

14

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

I want to help to develop diversity in my community and make sure that people have different perspectives of cultures.

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I do not have any experience yet, however, I am eager to learn!

Do you have previous municipal experience? If so, in what capacity have you served?

No, I do not.

What is your educational background?

I am currently in high school.

Employer

Job Title

[SERENA HU_3 .pdf](#)

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Check below to indicate that you have read, understand and agree to the following statement:

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I Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Serena Hu

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

SERENA HU

Sudbury, MA 01776

EXPERIENCE

MARTIAL ARTS INSTRUCTOR

March 2022 to present

CERTAIN VICTORY MARTIAL ARTS, MARLBOROUGH, MA

- Support and help teach a class of 15+ young children.
- Correct and show the right forms, hold pads and boards, motivate kids, and help with games, teach weapon forms, attend classes regularly.
- Second place in The World Martial Arts Federation competition.

CANCER ACTION NETWORK LEGISLATIVE AMBASSADOR AMERICAN CANCER SOCIETY IN MASSACHUSETTS

March 2022 to present

- Support and advocate policies cancer-related and other related health issues.

SUMMER INTERN

July 2022 to August 2022

BON OPUS BIOSCIENCES, MILLBURN, NJ

- Categorized and assigned attributes to more than 2,000 proteins, which eventually became part of the company's catalog book.
- Created brochures to promote the company's products.

DONATION CAMPAIGN TO HELP CHILDREN IN UKRAINE

March 2022 to May 2022

LINCOLN SUDBURY REGIONAL HIGH SCHOOL, SUDBURY, MA

- Initiated the donation campaign and coordinated with LS high school counselor and teachers to support the campaign.
- Organized and led several meetings with LS high schoolers to discuss the campaign details, gather ideas, assign responsibilities, and train them how to paint nails.
- Plan to roll out a 3-day event on school campus where our team will paint people's nails to raise money.
- Will donate the raised money to United Nations Children's Fund (UNICEF).

FOOD PANTRY VOLUNTEER

July 2022 to present

SUDBURY FOOD PANTRY, SUDBURY, MA

- Allocate and deliver food for 60-80 families in metro-west area. Accompany clients as they use the food pantry. Register clients. Stock the shelves. Pick up donated and purchased food. Set up food pantry for clients.

GOODNOW LIBRARY VOLUNTEER

July 2022 to present

GOODNOW LIBRARY, SUDBURY, MA

- Maintain bookshelves and add books on displays.
- Assist in various events held at the Goodnow Library.

EDUCATION

LINCOLN-SUDBURY REGIONAL HIGH SCHOOL, SUDBURY, MA

GPA: 4.0

AWARDS & HONORS

- Graduation Speaker
- Science Curiosity Award
- Musicianship Award

**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:

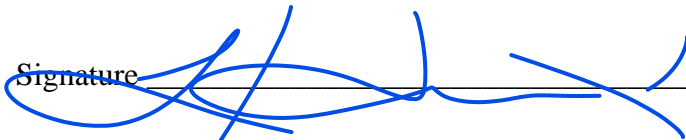
Times when you would be available (days, evenings, weekends):

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 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Application Form

Profile

Thomas _____ K _____ Plihcik _____
 First Name Middle Initial Last Name

 Email Address

595 North Rd _____ Suite or Apt _____
 Home Address

Sudbury _____ MA _____ 01776 _____
 City State Postal Code

 Primary Phone

 Alternate Phone

Question applies to multiple boards

MAY 2022 TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Sudbury Residency

Years Lived in Sudbury

5

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

Have worked in affordable housing for over 20 years and witnessed how we site, build and service housing has contributed to racial inequity.

Please describe your experience pertinent to this board/committee.

I'm an organizer and trainer with the Racial Equity Institute, a national organisation that provides training for all levels of organisations and institutions (public and private). I've spent time discussing structural and systemic racism with Cities and towns, universities, non-profits and Fortune 500 companies.

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Do you have previous municipal experience? If so, in what capacity have you served?

Brief experience with the Office of Housing and Community Development, Greensboro, NC, contractor for City of Boston, and presented to numbers municipalities across country.

What is your educational background?

BA Political Science

New Lease for Homeless Families

Employer

Executive Director

Job Title

[Thomas_Plihcik_resume.docx](#)

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

Check below to indicate 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 Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Thomas Plihcik

Thomas Plihcik
595 North Rd.
Sudbury, MA 01776

Summary: Over 20 years of experience in housing and community development. Intimate knowledge of public/private partnerships and financing, state and municipal functions, program implementation, and public relations. Committed to anti-racist movements addressing structural racism in our systems of service.

Experience:

Racial Equity Institute (REI), Greensboro NC
Contract Trainer September 2020 – Present

Responsibilities: Conduct 3-hour Groundwater Trainings for REI clients including Municipal/State/Federal agencies and partners, non-profit organizations, colleges and universities, private businesses from small to Fortune 100, trade associations, and foundations.

New Lease for Homeless Families, Boston MA
Executive Director January 2013 – Present

Responsibilities: Manage daily program and administrative operations, securing funding to support program operations, supervise placement and services, capacity building, creation of new programs for municipal and state partners.

- Founding Executive Director, created national model for homeless preferences
- Maintain 98% retention rate for over 500 formerly homeless households
- Expanded into Boston Public Schools and other target populations in Boston and Rhode Island.

Joint Committee on Housing, Massachusetts General Court, Boston, MA

Director April 2007 - December 2012. **Research Director** September 2004 - April 2007.

Research Analyst August 2003 - September 2004.

Responsibilities: Advise Committee Chairs on policy and leadership issues, coordinate Chair's agenda, secure passage of legislation, conduct budget and program evaluations.

- Directed passage of legislation including expiring use, \$1.275 billion Housing Bond, and expansion of the State Low Income Housing Tax Credit.

Early Experience: 1999 - 2003

Abt Associates Inc. Cambridge, MA.

The Community Builders, Inc. Boston, MA.

City of Greensboro, Department of Housing and Community Development. Greensboro, NC.

Education:

University of North Carolina at Greensboro – BA Political Science, Minor Sociology

Application Form

Profile

Dianne _____ Baxter _____
First Name Middle Initial Last Name

Email Address

2 East St _____
Home Address Suite or Apt

Sudbury _____ MA _____ 01776
City State Postal Code

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

30

Interests & Experiences

Please tell us about yourself and why you want to serve.

Attachment8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Why are you interested in serving on this board or commission?

I am the head of human resources learning and development for a technology company, and in this capacity I do a great deal of work in the DEIB space. I'm eager to both bring what I've learned, as well as learn from the committee re: the scope of DEI work in Sudbury. Much of the work I've done has been on the L&D side, educating stakeholders on DEI basic terminology and frameworks, behavior changes (e.g. how to have an ally-based conversation when you've witnessed microaggressions; what are the dimensions of diversity and where do we fit; unconscious biases, others), identifying processes/metrics to effect change. I've been interested in the work of this committee for quite some time: I've finally felt compelled to act when I saw the Globe visual on towns in MA and the incidents of Patriot Front activity in Sudbury. I'm sure the Board is all over that and I feel the DEI board with the Select Board has and can continue to make a difference.

Please describe your experience pertinent to this board/committee.

- Designed and facilitated multiple DEI programs for various companies. - Tracked DEI metrics in various organizations (hiring, promotions, engagement) - Partnered with internal functions (i.e. recruiting) to align efforts - Managed various DEI efforts (ERGs, process/procedure re-engineering, other)

Do you have previous municipal experience? If so, in what capacity have you served?

No. I've been on several not-for-profit boards in Sudbury but they are educational, religious, and sports related.

What is your educational background?

Employer

Job Title

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.

[Redacted]

Signature Confirmation

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I Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Dianne G. Baxter

Application Form

Profile

Duo Liu
First Name Middle Initial Last Name

[Redacted]
Email Address

6 Old County Road Unit 27
Home Address Suite or Apt

Sudbury MA 01776
City State Postal Code

[Redacted] [Redacted]
Primary Phone Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

3 Years

Sudbury Residency

Years Lived in Sudbury

2

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

Personally I am one of the minority and work hard for my life. I would like to create fair opportunities and environment in the community.

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I am a BU law graduate and work as an administrative attorney for a law firm in Boston. I have enough legal background and knowledge to serve on the board.

Do you have previous municipal experience? If so, in what capacity have you served?

No

What is your educational background?

Bu Law graduate in 2017

Blumsack & Canzano
Employer

Attorney
Job Title

[Duo_Liu_s_RESUME_01062022.pdf](#)
Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

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I Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Duo Liu

Application Form

Profile

Isabelle _____ Li _____
First Name Middle Initial Last Name

Email Address

134 Cold Brook Dr. _____
Home Address Suite or Apt

Sudbury MA 01776
City State Postal Code

Primary Phone

Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

9

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

I am an Asian American and have experienced and witnessed many acts of racism, oppression, exclusion, and more throughout my whole life. This is a topic I am very familiar with, and I am very interested in creating a safe community for all in which people can feel at ease with themselves.

Please describe your experience pertinent to this board/committee.

I am a member of the Chinese American Association in Sudbury, and I have volunteered with them since I was young.

Do you have previous municipal experience? If so, in what capacity have you served?

No

What is your educational background?

Currently in 11th grade

Employer

Job Title

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

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I Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Isabelle Li

Application Form

Profile

Maria Huang
First Name Middle Initial Last Name

[Redacted]
Email Address

15 hollow oak drive
Home Address Suite or Apt

Sudbury MA 01776
City State Postal Code

[Redacted] [Redacted]
Primary Phone Alternate Phone

Which Boards would you like to apply for?

Diversity, Equity & Inclusion Commission: Submitted

Question applies to multiple boards

TERM EXPIRATION STATUS: Do you wish to be REAPPOINTED

Yes No

Question applies to Diversity, Equity & Inclusion Commission

If you are RE-APPLYING for the Diversity, Equity and Inclusion Commission, what is your TERM DURATION preference?

None Selected

Sudbury Residency

Years Lived in Sudbury

14

Interests & Experiences

Please tell us about yourself and why you want to serve.

Why are you interested in serving on this board or commission?

I have grown up in the Sudbury community, and now as a high school student, wish to help Sudbury be more inclusive and aware of the struggles of minority groups.

Attachment 8.c: DEI Applications and Resumes Nov 2022 (5593 : Interview new applicants for DEI)

Please describe your experience pertinent to this board/committee.

I am part of the Chinese American Association of Sudbury, and a student at LSRHS.

Do you have previous municipal experience? If so, in what capacity have you served?

No.

What is your educational background?

Employer

Job Title

Upload a Resume

Availability

When are you available to attend board/committee meetings? (Please select all that apply) *

Town Interest

Do you or any member of your family have any business dealings with the Town? If yes, please explain.



Signature Confirmation

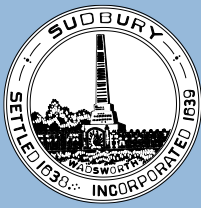
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I Agree

Fill in your name below to confirm: I hereby submit my application for consideration for appointment to the Board(s) or Commission(s) indicated above.

Maria Huang



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

9: Open 2023 Warrant and announce ATM dates

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Open 2023 Warrant and announce Annual Town Meeting dates of May 1-3, 2023 at Lincoln-Sudbury Regional High School. The deadline to submit articles for the Town Meeting Warrant is Tuesday, Jan. 31, 4:30 PM.

Recommendations/Suggested Motion/Vote: Open 2023 Warrant and announce Annual Town Meeting dates of May 1-3, 2023 at Lincoln-Sudbury Regional High School. The deadline to submit articles for the Town Meeting Warrant is Tuesday, Jan. 31, 4:30 PM.

Background Information:

Financial impact expected:

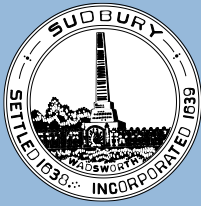
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

10: Transportation update

REQUESTOR SECTION

Date of request:

Requestor: Member Carty

Formal Title: Update and discussion on Select Board Transportation Goal

Recommendations/Suggested Motion/Vote: Update and discussion on Select Board Transportation Goal

Background Information:
attached documents provided by Dan Carty

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM

	TAXI	UBER	TOTAL		# Rides Taxi	# unique riders, Taxi	Avg \$/ride Taxi	# Rides Uber	# unique riders, Taxi	Avg \$/ride Uber	# riders using both modes	Running 12 mo Avg, Total	Running 12 mo Avg, Taxi	Running 12 mo Avg, Uber
Sep-20	\$2,261.50	\$0.00	\$2,261.50											
Oct-20	\$6,810.30	\$0.00	\$6,810.30											
Nov-20	\$6,119.60	\$0.00	\$6,119.60											
Dec-20	\$11,144.60	\$0.00	\$11,144.60											
Jan-21	\$10,971.50	\$0.00	\$10,971.50											
Feb-21	\$6,218.00	\$73.10	\$6,291.10					4		\$18.28				
Mar-21	\$406.50	\$218.64	\$625.14					14		\$15.62				
Apr-21	\$714.00	\$476.11	\$1,190.11					42		\$11.34				
May-21	\$2,043.00	\$598.13	\$2,641.13	FY22 TOTAL	21		\$97.29	39		\$15.34				
Jun-21	<u>\$5,170.30</u>	<u>\$1,618.72</u>	<u>\$6,789.02</u>	\$54,844.00	79		\$65.45	225		\$7.19				
Jul-21	\$3,724.50	\$2,388.37	\$6,112.87		51		\$73.03	129		\$18.51				
Aug-21	\$4,617.50	\$3,017.75	\$7,635.25		77		\$59.97	135		\$22.35		\$5,716.01	\$5,016.78	
Sep-21	\$5,056.50	\$3,774.34	\$8,830.84		73		\$69.27	171		\$22.07		\$6,263.46	\$5,249.69	
Oct-21	\$5,300.30	\$3,492.27	\$8,792.57		79		\$67.09	154		\$22.68		\$6,428.64	\$5,123.86	
Nov-21	\$4,323.30	\$2,147.85	\$6,471.15		58		\$74.54	103		\$20.85		\$6,457.94	\$4,974.17	
Dec-21	\$5,040.00	\$3,032.66	\$8,072.66		64		\$78.75	151		\$20.08		\$6,201.95	\$4,465.45	
Jan-22	\$4,973.90	\$2,426.53	\$7,400.43		63		\$78.95	130		\$18.67		\$5,904.36	\$3,965.65	\$1,938.71
Feb-22	\$7,755.50	\$2,872.53	\$10,628.03		86		\$90.18	138		\$20.82		\$6,265.77	\$4,093.78	\$2,171.99
Mar-22	\$7,691.30	\$4,590.11	\$12,281.41		102		\$75.40	223		\$20.58		\$7,237.12	\$4,700.84	\$2,536.28
Apr-22	\$6,230.50	\$5,282.77	\$11,513.27		77		\$80.92	249		\$21.22		\$8,097.39	\$5,160.55	\$2,936.84
May-22	\$6,246.10	\$6,185.38	\$12,431.48	FY22 TOTAL	63		\$99.14	259		\$23.88		\$8,913.25	\$5,510.81	\$3,402.44
Jun-22	<u>\$6,277.00</u>	<u>\$4,243.07</u>	<u>\$10,520.07</u>	\$110,690.03	75		\$83.69	193		\$21.98		\$9,224.17	\$5,603.03	\$3,621.14
Jul-22	\$4,549.40	\$4,798.18	\$9,347.58		57	16	\$79.81	245	22	\$19.58	2	\$9,493.73	\$5,671.78	\$3,821.95
Aug-22	\$6,995.95	\$4,578.69	\$11,574.64		98	27	\$71.39	213	30	\$21.50	3	\$9,822.01	\$5,869.98	\$3,952.03
Sep-22	\$8,047.45	\$3,598.24	\$11,645.69		105	35	\$76.64	201	30	\$17.90	5	\$10,056.58	\$6,119.23	\$3,937.36
Oct-22	\$8,576.00	\$3,921.32	\$12,497.32	\$46,277.63 ATM 2022 Funds Remaining	105		\$81.68	220	32	\$17.82		\$10,365.31	\$6,392.20	\$3,973.11
Nov-22	\$8,000.00	\$4,000.00	\$12,000.00									\$10,826.05	\$6,698.59	\$4,127.46
Dec-22	\$8,000.00	\$4,000.00	\$12,000.00									\$11,153.33	\$6,945.26	\$4,208.07
Jan-23	\$8,000.00	\$4,000.00	\$12,000.00	\$87,000.00 MassDev Taxi Grant Antipated								\$11,536.62	\$7,197.43	\$4,339.19
Feb-23	\$8,000.00	\$4,000.00	\$12,000.00									\$11,650.96	\$7,217.81	\$4,433.15
Mar-23	\$8,000.00	\$4,000.00	\$12,000.00									\$11,627.50	\$7,243.53	\$4,383.97
Apr-23	\$8,000.00	\$4,000.00	\$12,000.00									\$11,668.07	\$7,390.99	\$4,277.07
May-23	\$8,000.00	\$4,000.00	\$12,000.00	FY22 TOTAL								\$11,632.11	\$7,537.15	\$4,094.96
Jun-23	\$8,000.00	\$4,000.00	\$12,000.00	\$141,065.23								\$11,755.44	\$7,680.73	\$4,074.70
				-\$1,722.37 ATM 2022 Funds Remaining										
	Projected			\$39,000.00 MassDev Taxi Grant Remaining										
FY2024 Projected Spend			\$144,000.00											
FY2023 Projected funds remaining			\$37,277.63											
FY2024 Required Funding			\$106,722.37	---->\$125,000										

October Uber
 220 rides
 Adults 60+ years, 22%
 Limited financial means, 28%
Limiting driving ability, 46%
 Veterans, 4%
32 unique riders
 Average cost /trip \$17.82
 Cost to Sudbury \$3,921 (copay contribution: \$1,898)

Attachment 10.a: Go Sudbury! 11292022SB spend actual and projected (5614 : Transportation update)

Technical Assistance for Sudbury Transit: Response From Sudbury

Background

The Town of Sudbury has expressed interest in having CTPS evaluate the potential for a **first stage of regional** pilot transportation programs, with an emphasis on livability, transportation equity, and economic vitality, through the Regional Transit Service Planning technical assistance program. The town seeks ideas for **proof-of-concept** programs **involving additional communities and regional transit authorities, among others**, to help provide transportation access in areas with limited options beyond the private automobile.

Objectives

The objective of this project is to **identify proof-of-concept pilot options, taking into account** existing conditions of transit service, population, and employment in the **MAGIC region, focusing first on the town of Sudbury and collaborating towns**, and **determine where there** are unserved or underserved areas where new demand response or shuttle services could provide new or improved transit connections. **Also included in “existing conditions” are the identified systemic issues affecting collaboration: municipal staffing, and RTA and Home Rule policies.**

Task 1 Identify Proof-of-Concept Issues Relevant to Strategic Goals

As part of this task, CTPS will **review** existing employment hubs within a **selected area (e.g., within MAGIC region)** and the density and demographics of the resident population, primarily using the U.S. Census American Community Survey and Longitudinal Household Dynamics data. **More recent and detailed inputs to the latter data, such as the following available materials, will provide input to this task:**

- **MAGIC livability and 495 Partnership economic data,**
- **Outcomes of current regional transportation pilots: Urgent Taxi/Livery initiatives (two pilots) and Making the Connections (Community Compact initiative).**
- **Individual town needs assessments (e.g., Livable Sudbury, 2019) and surveys relevant to transportation,**
- **Regional transportation survey of towns collaborating in the Making the Connections initiative, conducted by Nelson/Nygaard (2021),**
- **Recent demographic data from town housing production plans and census data, showing aging-in-place and in-migration trends and outcomes,**
- **Stakeholder feedback on transportation challenges (e.g., Public Safety, Boards of Health, social service organizations, etc.).**

In the first stage, CTPS will also examine present travel patterns between locations in the town of Sudbury, and to other locations in the service area of the MWRTA and MBTA transit networks. This will include travel by all modes combined—**such as Council on Again and similar modes**—and transit shares of this travel. **Ridership and route data from Sudbury’s taxi and Uber programs will inform the travel pattern data.** Information sources for work journeys

Sapienza, DBA 11.18.22

will include the U.S. Census American Community Survey and Longitudinal Household Dynamics data; information for both work journeys and non-work journeys will include passenger counts and passenger surveys for existing MWRTA services, and other information such as taxi ridership data and ridesharing data that Sudbury planners may have available.

Because the taxi and Uber initiatives noted above include regions served by additional transit providers (Lowel RTA and Montachusett RTA), travel patterns affected by the latter RTAs may be part of a next stage of effort.

Task 2 Identify Potential New Transportation Services **Involving Sudbury and Collaborating Towns**

The information collected in Task 1 will show present and potential demand for transit by residents **of a designated MAGIC area including Sudbury**. In Task 2, CTPS will use this information to formulate potential strategies for serving this demand. Changes could include recommendations for a new town-sponsored fixed-route service, expansion to the existing MWRTA fixed route network, or a new municipally subsidized on-demand service by ride-share companies.

For each suggested strategy, CTPS will utilize peer comparisons to estimate the potential ridership and cost. Staff will also describe potential implementation strategies, such as possible funding sources, types of vehicles, and operator(s).

CTPS will document the results of Tasks 1 and 2 in a technical memorandum **and provide suggested follow-on strategy and tasks, such as appropriate sources of funding**.

UBER SURVEY: VERBATIM COMMENTS

NOTE: Survey usable response rate = 48%. Forced choice response satisfaction for very/extremely satisfied included: (1) ease of scheduling (88%), driver (91%), compliance with safety regulations (94%), punctuality (90%), overall satisfaction (88%).

100% of usable responses also include verbatim comments; of these, 57%% are positive (see above Word Cloud). Negative comments include need for more drivers; one-third negative comments referred to copay and/or cap on rides.

**MATERIALS FROM
9/13/22 SB MEETING IN
THE FOLLOWING
PAGES**

SELECT BOARD SCENARIOS

Prepared by the Sudbury Transportation Committee

Introduction

On 19 October 2021, the Sudbury Transportation Committee presented an update of transportation services to the Select Board. This included a summary of initiatives to date, provided background on transportation in the town and MAGIC region, and concluded with questions about sustaining services beyond current *ad hoc* funding opportunities (e.g., MAPC emergency taxi grant program).

In response, the Select Board requested that the committee provide a business plan for sustainability, to be reviewed in the context of 2023 budget cycle.

We want to make clear that the GoSudbury! programs were designed as pilot initiatives. They are heavily subsidized in order to provide maximum data on as many transportation variables as possible for the most needy riders (e.g., destinations, heavily traveled routes, times of requests). Uber program copays are based primarily on CoA fees that, in turn, are subsidized by the MetroWest Regional Transit Authority (MWRTA). The taxi program, because of the funding agency's (MAPC) goal, is entirely free to riders. The Metropolitan Area Planning Council and MassDevelopment awards require 95% of their total to support taxi, hackney, and livery companies, with no funds going to TNCs.

We understand that rider fees will not support the cost of transportation and that additional funding will be necessary. Thus, the Transportation Committee has already undertaken a number of steps to prepare for the imposition of rider fees, although subsidies will always be available for residents with financial limitations. These steps include:

- Informing all program registrants that fees will be increased (and, in the case of taxis, levied) in the future.
- Designing a brief survey to ascertain the price elasticity of demand, under several fee scenarios based on distance from Sudbury.
- Examining fee structures used in area communities (Weston, Newton, Lexington, etc.) and, where available, what proportion of total costs they cover.
- Assessing contribution from fees to Sudbury transportation options, based on several demand assumptions (reduced, same, increased) and fee structures, in order to identify likely overall costs to the Town and the size of the gap to be covered by outside funding.

Purpose

The purpose of this document is to describe three scenarios based on different measures of ride volume and cost, acknowledging the uncertainty of co-payment impacts:

Sapienza, DBA; 3.21.22

1. LOW: e.g., continuing with current (or reduced) services;
2. MEDIUM: e.g., modest expansion of services (additional target riders, additional destinations); and
3. HIGH: e.g., expanding transportation to meet needs identified by the Livable Sudbury research.

Each scenario includes assumptions relevant to the above measures. However, certain assumptions apply to all scenarios. These include:

- The overarching goal is *mobility as a service*—this means primary emphasis on *coverage* (including social goals, such as equity and environmental stewardship) rather than *patronage* (only numerical size of ridership). Affordable, reliable, accessible options will be a hallmark. To ensure equity, subareas with special needs (e.g., food deserts, employment and shift constraints, etc.) will receive priority.¹
- Service coverage by a transit authority is economically infeasible. Partnering with these authorities and supplementing with microtransit, as well as regionalizing Council on Aging vehicles, should be part of service design.
- Strong and continuous marketing is required, as is continuous quality improvement processes.
- Although all scenarios should include smartphone app(s), some concierge service must be part of the system, for residents unable to use smartphone/app.
- All scenarios must address environmental concerns, including increase in electric vehicles and *reduction of single-occupancy vehicles (SOV)*.² Of course, providing multi-passenger service is contingent on the pandemic situation.

The scenarios are described below. Attachments provide background material and additional detail.

Scenario 1 (Low Volume/Cost): Do Nothing, Low Option 1, Low Option 2

Assumptions specific to Scenario 1 are the following:

- Elimination of the GoSudbury! programs (*do nothing*) will result in hardships for residents who have relied on them for transportation to medical care and work. Elimination will also increase the likelihood of social isolation for residents who cannot drive or who do not have access to cars (or individuals to drive them).
- Low options 1 and 2 presume no change in number of riders, types of destinations, and pricing of contracted services; however, adding fees, capping services, and/or increasing co-payments will alter the use of services.
- Existing Town staff and Transportation Committee volunteers will be able and willing to oversee and manage the services.

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Do Nothing. With a do-nothing approach, it is reasonable to expect that the GoSudbury! Taxi and Uber programs would be discontinued. Keeping skeleton versions may be possible with various grants, but as such would be subject to stopping with little to no notice. Any services provided would have to be managed by Transportation Committee volunteer and staff time, assuming Transportation Committee is extended by the Select Board beyond its current sunset date (Spring 2022).

Transportation options would include only Sudbury Connection Vans and the MWRTA Dial-a-Ride, limited to those aged 60+ or 18+ with a disability verified by a doctor’s note. Services provided are summarized below.

Service	Sudbury Connection Van	MWRTA Dial-a-Ride = MWRide
Service Summary	<ul style="list-style-type: none"> · Door to door rides · Weekdays, 8:30 AM to 4:00 PM · Wheelchair accessible 	<ul style="list-style-type: none"> · Door to door rides · T & TH 4:00 PM to 6:30 PM · Wheelchair accessible · MWRTA is MetroWest Regional Transit Authority
Where do rides go?	· Local & 4 nearby towns: Concord, Wayland, Framingham, Marlborough	Local, Marlborough, Wayland, Framingham, Natick, Southborough, Ashland, Hopkinton, Holliston
How much is the fare?	<ul style="list-style-type: none"> · \$ 1 in town, one-way ride · \$ 2 out of town, one-way ride · Personal Care Assistant (PCA) free <p>No cash: set up account with MWRTA (<i>see Other Notes, below</i>)</p>	<ul style="list-style-type: none"> · \$ 2 out of town, one-way ride · Personal Care Assistant (PCA) free · No cash: set up account with MWRTA (<i>see Other Notes, below</i>)
What purposes for rides?	<ul style="list-style-type: none"> · Medical/dental appointments · Grocery shopping · Pharmacy/errands · Social/community events 	<ul style="list-style-type: none"> · Medical/dental appointments · Grocery shopping · Pharmacy & errands · Social/community events
Who is eligible?	<ul style="list-style-type: none"> · Sudbury resident · 60+ years · 18+ with disability verified by doctor’s note 	<ul style="list-style-type: none"> · Sudbury resident · 60+ years · 18+ with disability verified by doctor’s note
Reservation necessary?	Reservations must be made at least 48 business hours in advance of the ride	Reservations must be made at least 48 business hours in advance of the ride

Attachment10.e: MATERIALS FROM 9.13 (5614 : Transportation update)

Sapienza, DBA; 3.21.22

Low Option 1: \$50,000/yr. A low-cost option funded at \$50,000/yr would likely yield significantly limited Taxi and Uber services. Between May through December 2021, the average taxi ride cost was \$68. During 7 months of taxi usage (after one month of startup), the two companies provided an average of 69 rides/month. Annualized, this results in 828 rides at \$68/ride or \$56,304 (assuming no copay). Between February and December 2021, Uber average ride cost was \$18. During 7 months of Uber usage after an earlier beta test, the company provided an average of 153 rides/month. Annualized, this results in 1,836 rides at \$18/ride or \$33,048 cost (assuming no change in rider co-pays). Total cost under these assumptions—no change in number of riders or in copayments where applicable—would be \$89,352.

Hence, at \$50,000/yr funding under the above assumption, the current service would have to be reduced by a little more than half. However, limitations on riders could extend the service. These include capping the numbers of Uber and Taxi rides users could take per month, increasing co-pays for Uber and levying copays for the taxi, or imposing both. Note that providing partially subsidized Uber services without offering at least JFK taxi transport is not an option under ADA, because Uber does not provide wheelchair accessible vehicles.

Like the prior do-nothing option, existing Town staff and Transportation Committee volunteers would be relied on to sustain the program as they do currently.

This option is independent of the Sudbury Connection Van and MWRTA Dial-A-Ride services, as they are funded by the regional transit authority.

Low Option 2: \$100,000/yr. Given the extrapolation above, the current service level **might** be possible for \$100,000/yr under the same assumptions. However, it would still be prudent to cap rides and/or increase/levy co-pays to ensure funds do not run out before the year is over. Again, no new dedicated staff would be available to manage this scenario beyond existing Town staff and Transportation Committee volunteers.

This option is also independent of the Sudbury Connection Van and MWRTA Dial-A-Ride services for the same reason.

Scenario 2 (Medium Volume/Cost)

Assumptions specific to Scenario 2 are the following:

- Eligible participants in the Go Sudbury! Program will still be restricted to the following categories:
 - 50 years of age or older
 - 18 years of age or older with a disability that limits driving
 - Active duty military or veteran
 - Resident with financial need
 - Essential worker requiring transportation for work.

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- Expanding the purposes for which Program transportation can be used and keeping fares the same (free taxi, heavily subsidized Uber) will have a modest impact on service volume.
- Under Option 1, existing Town staff and Transportation Committee volunteers will be able and willing to oversee and manage the expanded services.
- Under Option 2, ARPA funds are allocated to a part-time staff person, and that is sufficient to oversee and manage expanded services.

Medium Option 1: \$138,000. This option expands the purposes of rides for the above residents but keeps co-pays the same for Uber and free fare for taxis (see table below):

Service	Taxi Rides Current	Uber Rides Current	Taxi Rides Proposed	Uber Rides Proposed
Service Summary	<ul style="list-style-type: none"> • Door to door rides • Sunday to Thursday, 5:00 AM to 1:00 AM; Friday and Saturday 5:00 AM to 2:00 AM • Wheelchair accessible, but limited Monday to Friday to early mornings and afternoons 	<ul style="list-style-type: none"> • Door to door rides • 24 hours a day/7 days a week (subject to driver availability) 	<ul style="list-style-type: none"> • Door to door rides • Sunday to Thursday, 5:00 AM to 1:00 AM; Friday and Saturday 5:00 AM to 2:00 AM • Wheelchair accessible, but limited Monday to Friday to early mornings and afternoons 	<ul style="list-style-type: none"> • Door to door rides • 24 hours a day/7 days a week (subject to driver availability)
Where do rides go?	<ul style="list-style-type: none"> • Within Sudbury and up to 25 miles outside of Sudbury • All rides must begin or end in Sudbury • No access to Logan Airport 	<ul style="list-style-type: none"> • Within Sudbury and up to 25 miles outside of Sudbury • All rides must begin or end in Sudbury • No access to Logan Airport 	<ul style="list-style-type: none"> • Within Sudbury and up to 25 miles outside of Sudbury • All rides must begin or end in Sudbury • No access to Logan Airport 	<ul style="list-style-type: none"> • Within Sudbury and up to 25 miles outside of Sudbury • All rides must begin or end in Sudbury • No access to Logan Airport
How much is the fare?	<ul style="list-style-type: none"> • Free (currently as part of grant stipulation) 	<ul style="list-style-type: none"> • \$ 1 within Sudbury • \$ 2 to/from neighboring towns • \$ 10 to/from location up to 25 miles outside Sudbury 	<ul style="list-style-type: none"> • Free (currently as part of grant stipulation) • Co-pays are likely to be added 	<ul style="list-style-type: none"> • \$ 1 within Sudbury • \$ 2 to/from neighboring towns • \$ 10 to/from location up to 25 miles outside Sudbury

Attachment10.e: MATERIALS FROM 9.13 (5614 : Transportation update)

What purposes for rides?	<ul style="list-style-type: none"> • Non-urgent healthcare appointments only 	<ul style="list-style-type: none"> • Non-urgent healthcare appointments • Work • Shopping • Get to community resources 	<ul style="list-style-type: none"> • Non-urgent healthcare appointments • Work • Shopping • Get to community resources 	<ul style="list-style-type: none"> • Any purpose
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Within the last 12 months, the Go Sudbury! Program expended over \$78,000 providing taxi and Uber rides. This amount includes a pause on taxi rides in March and April of 2021, and only 10 months of Uber rides since that portion of the program got underway. Over the last six months, the program has expended over \$45,000 with an average of \$7,569 in expenditures each month. This is a more accurate reflection of the per month charges for the Go Sudbury! Program in its current state, which extrapolates to almost \$91,000 in expenditures for rides over a 12-month period. On top of this, the yearly fee for dispatching taxi rides by CrossTown Connect is \$4,950. This brings the approximate total yearly cost to operate the Go Sudbury! Program at its current service level to \$96,000.

In the proposed increased service level, options for taxi rides would expand from only non-urgent healthcare appointments to allowing work, shopping, and community resource trips as well. Additionally, the types of permissible Uber rides would be expanded to allow rides for any purpose to eligible Go Sudbury! Program participants.

This proposed broadening of permissible types of taxi and Uber rides will likely increase the number of overall rides by at least 33% due to the following. First, by broadening the permissible types of Uber rides, there will be instances where program participants will take rides for purposes beyond minimal services. This might include rides to educational classes for themselves or family members, child care drop off/pickup, or even an occasional recreational activity. Second, pickup times for taxi rides can be scheduled in advance, while Uber rides (“on-demand”) cannot. As such, program participants may find taxi service easier to coordinate with their schedules. By expanding the types of permissible taxi rides, the fact that taxi rides are completely free of charge under the Go Sudbury! Program, and the probability that participants who may have been taking other forms of transportation to some of these destinations would now use a taxi ride instead, the number of taxi rides would increase an estimated 33% under this proposed scenario. Estimated total annual cost for rides would be \$127,680.

No new dedicated staff would be added to manage this option; however, due to the increased number of rides, this would likely raise the CrossTown Connect dispatching fee one level which would cost an additional \$5,000 per year (approximately \$10,000 in total). Existing Town staff and Transportation Committee volunteers might be able to sustain other aspects of the program as they do currently for a lower volume.

Sapienza, DBA; 3.21.22

Based on the above assumption—*only* a 33% increase in ride volume and no increase in staff to manage the programs—the cost per year of this increased level of service would be \$138,000.

This proposed scenario is independent of the Sudbury Connection Van and MWRTA Dial-A-Ride services, as they are managed outside of the Go Sudbury! Taxi and Uber Rides programs.

Medium Option 2: \$188,000

Medium Option 2 assumes one year of ARPA funding (\$50,000) for a part-time Transportation Coordinator, in addition to the cost of expanded services identified in Medium Option 1 (\$138,000).

One segment of the October 2021 presentation by the Transportation Committee to the Select Board described transportation responsibilities. As discussed above, these are currently handled by several Town staff as well as volunteers on the Transportation Committee, with the addition of a paid dispatch service for taxis provided by TransAction Associates (available to Sudbury as member of the TMA, CrossTown Connect). Attachment 3 provides some of these examples.

Given any increase in transportation services, additional part-time staff will be required. Most of the area municipalities with which Sudbury might be compared employ such staff. Thus, in November 2021, the Transportation Committee requested \$150,000 in ARPA funds for transition support of a part-time Transportation Coordinator for 3 years: “A point person to oversee transportation services, and to identify, apply for and manage grant funds to expand services. This person would also be Sudbury’s representative to regional meetings on transportation.” Full details can be found in the formal ARPA request letter to the Town Manager.

Scenario 3 (High Volume/Cost): Addressing Livable Sudbury Needs

Scenario 3 addresses three priority needs from the Livable Sudbury report. Attachment 1 provides background on the Livable Sudbury research, and Attachment 2 shows results of a question about transportation from the research. The priority needs are as follows:

- (1) Special populations (seniors, people with disabilities, veterans, financially vulnerable): reliable, efficient, and attractive on-demand, door-to-door service both within Sudbury and to specific destinations, with subsidies for those meeting affordability criteria;
- (2) Commuters: reduction in single-occupancy vehicle traffic in and through Sudbury by means of reliable, efficient, and attractive multi-passenger commuter connections to public transit links;
- (3) All residents (including children/youth, age TBD): reliable, efficient, and attractive multi-passenger options within Sudbury, to specific destinations, including evenings and weekends.

In addition to assumptions relevant to all scenarios, the following are particular to Scenario 3.

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- **Scale.** Given the comparatively small size of Sudbury, provision of transportation services that are affordable implies scale economies achieved by (a) collaboration of multiple towns, (b) regionalization of some common services (e.g., CoA vans), and (c) software appropriate to the desired system (reliable, efficient, attractive). Fortunately, examples of these are readily available.
- **Multiple service providers.** Meeting the three priority needs described above will entail state (e.g., MBTA), regional transit authorities, transportation management, and microtransit providers. From an environmental perspective, partnerships with bike- and car-share companies (as well as incentives for pooled trips and electric vehicles³) should also be considered.
- **Smart applications for riders and providers.** The more complex a system, the greater the efficiencies gained by decentralized software allowing real-time coordination among providers and riders. Again, examples are readily available.
- **Sustainability.** Even with scale economies, rider fees will fund only a small portion of the cost of the desired system. Funds from collaborating towns, transit authorities, and grants, along with intelligent negotiation of rates with microtransit providers, and rider co-pays/fares must sustain the system. Examples are readily available.

Elements of System Design

Caveat: Because of the scale and inherent complexity of this scenario, the total cost is likely to be around \$1M per year. The table below shows estimated cost for each participating community on a population pro rata basis:

<i>Town</i>	<i>Population Est.</i>	<i>Percentage Total</i>	<i>Pro Rata Cost</i>
<i>Sudbury</i>	<i>19,000</i>	<i>22%</i>	<i>\$220,000</i>
<i>Acton</i>	<i>24,000</i>	<i>28%</i>	<i>\$280,000</i>
<i>Concord</i>	<i>18,500</i>	<i>21%</i>	<i>\$210,000</i>
<i>Lincoln</i>	<i>7,000</i>	<i>8%</i>	<i>\$80,000</i>
<i>Maynard</i>	<i>11,000</i>	<i>13%</i>	<i>\$130,000</i>
<i>Stow</i>	<i>7,200</i>	<i>8%</i>	<i>\$80,000</i>
	<i>86,700</i>	<i>100%</i>	<i>\$1,000,000</i>

Note that the likely cost of this option for Sudbury is only about \$30,000 more than Medium Option 2. The reason for the small increment is, of course, economies of scale: multiple towns serve as a more powerful buyer; involvement of regional transit authorities provides additional services at minimal cost; and centralized management (possibly through the vendor contracted to supply microtransit services) relieves financial pressure on participating municipalities.

The total of \$1M is based on Newton's recent annual operating cost. A brief summary of the evolution of Newton's transportation system is provided later in this discussion, because it is the

Sapienza, DBA; 3.21.22

basis for the Committee's proposal here. In addition, planning and system design for this scenario will require professional consultant input.

Currently, in the Making the Connections initiative, five towns in the MAGIC region are collaborating: Sudbury (lead), Acton, Concord, Maynard, and Stow. If we add Lincoln to this group, we have a total population of about 85,000 people (Newton's is 89,000), as well as:

- Four commuter rail stations (Fitchburg line to North Station) in three towns (Acton, Concord [two], and Lincoln) and close proximity of Sudbury to the Framingham-Worcester to South Station rail. Stow is about the same distance to Acton and Framingham commuter rail stations.
- The CrossTown Connect shuttle system for Maynard and Acton (vehicles are CoA vans), with service to South Acton commuter rail.
- The MWRTA bus service in Wellesley and Newton, providing connections to the MBTA. Connecting transit to that service is possible from Marlborough and Framingham.
- Potential for regionalizing all CoA vans in the collaboration.

Challenges, of course, are the rural nature of these communities and the very large geographic area they represent—about six times the size of Newton for about the same population.⁴ For this reason, the following types of transportation will be required: public transportation (including regional transit authority and Council on Aging vehicles) and private microtransit in the form of taxis, livery, TNCs, and firms providing vehicles, such as Via.⁵

Types of routing in a system such as this could involve:

- *Spoke to hub* (pick up at residences and drop off at transit authority hub for further service; e.g., to bike share, car share, commuter rail)
- *Shuttle* (from designated parking lots to specific destinations, including work sites as well as transit hubs)
- *Predictable on-demand* (non-commute multi-passenger service to shared destinations, such as library, bank, etc.)
- *Loop* (similar to shuttle; short, fixed route, multi-passenger vehicles traveling high-use corridors)
- *Unexpected on-demand* (for single-passenger service to meet unexpected needs that cannot be provided by the above).

For a scenario of this complexity, only the following matrix of potential sources and uses of funds is provided (estimated costs for each would be required, once a potential design is agreed upon):

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Source of Funds	Examples	Use of Funds
Collaborating communities	Sudbury, Stow, Maynard, Acton, Concord, Lincoln	Tax levy assigned to subsidies for resident transportation services
Regional Transit Authorities ⁶	MWRTA, LRTA, MART	Vehicles and drivers, operating costs, etc., for fixed route and “loop” services
State Transit Authority	MBTA	Public mass transit hubs (commuter rail, etc.) and paratransit within area (RIDE)
Transportation Management Association	CrossTown Connect	Regionalizing CoA vans for commute and other services
Federal grants	ARPA, US DOT, etc.	Transit authority support for above uses, including smart software
State grants	MPO, Community Transit, CCC, etc.	Community support (pilots, subsidies, etc.), including smart software
System software	Spare Labs, TransLoc, Uber, etc.	Route optimizing and rider matching system software (app based)
Demonstration grant agencies	RW Johnson, Ford, etc.	Targeted transportation pilots (health care, reducing social isolation, developing workforce, smartphone education, etc.)
Rider co-pays	Geofence co-pays within and beyond communities; targeted destinations, etc.	Partial support for services
Donations, gift vouchers, etc.	Community residents	Partial support for individuals and/or services

Attachment 4 contains information on Marin County’s transportation services and illustrates the elements likely to be included in this scenario’s proposed design.⁷ Because it is relevant to the above proposal, Newton’s transportation system is summarized below:

Newton Example: *NewMo*

Newton’s current system has evolved in three stages:

Stage 1, 2010-2019. Initially, Newton provided subsidized taxi service for seniors, for medical, social, and shopping purposes. This averaged 25,000 trips/year:

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- Pre-COVID Trips 400+/week
- Shared trips 30%
- ETA 14 min
- On time 82%
- Phone booking 80%

Stage 2, 2019-2021 (*NewMo for seniors*). An RFP was announced in 2018 by Newton for a microtransit initiative serving senior residents. After reviewing the proposals, the city chose Via and announced the decision:⁸

...The city of 89,000 signed a three-year contract with New York transportation company Via, which provides four Mercedes-Benz Metris vans sporting the NewMo logo. The vans hold up to six passengers, and one vehicle is wheelchair accessible. The service runs on weekdays, 8 a.m. to 5 p.m., and from 9 a.m. to noon on weekends.

In this first year [2019], the city will pay Via \$489,000 to run the service, with \$350,000 coming from the city's senior services budget [70%], \$25,000 from a Community Compact grant, \$25,000 from a formula grant for councils on aging [10%] and the remainder from rider fares [\$89K, <20%]. Freedman [Director of Transportation Planning] has also applied for a community transit grant from the Massachusetts Department of Transportation.

Jayne Colino, Newton's senior services director, said that 40 percent of Newton's households now have a person over 60 years of age. The city's previous taxi-voucher system had suffered as the taxi industry struggled to compete against the ride-share companies, she said. 'We knew that we had to take a new approach because the traditional providers were not there in the way that we needed them to be,' Colino said.... Under a former taxi-voucher system, the city provided 25,000 trips a year. In NewMo's first three weeks, 401 seniors had signed up, with 804 trips made.

NewMo for seniors, as described above, provided subsidized (\$0.50-\$5 fare) services to select Newton and outside Newton locations.

Stage 3, Fall 2021 - present (*NewMo for everyone*). Based on their experience with NewMo for seniors, and aligned with their strategic plan for transportation, the city expanded to a sponsored ridesharing service for all residents. This service is smartphone-enabled, allowing riders to book rides "straight from your phone, get picked up in minutes, and travel anywhere in Newton without needing a car."

The most recent data for the above service (NewMo for seniors operates separately) are:

- Microtransit
- Service area –everywhere Newton+

Sapienza, DBA; 3.21.22

- 7 vehicles
- M-F 7:00 AM -6 PM
- \$2/trip
- Corner-to-corner
- High ridership ~ 175 trips per weekday
- Preschedule any medical appointment.

Since inception of this latest expansion, the following types of rides have been provided: 43% to/from jobs or school, 30% to/from transit, and 28% trips to school. More than one-third of riders are receiving public assistance. It should also be noted that Uber has been used as a safety-net provider.

Annualized costs and sources of funding for both programs, seniors, and all residents, are as follows:

- ~ \$980,000 annual operations fee
- \$58.11 per vehicle-service hour

FY 22 Funding Sources

- CTGP (MassDOT Community Transit Grant Program, senior service) ~\$125,000
- Workforce Transportation \$175,000
- MPO Community Connections \$240,000
- UMass @ Mt Ida \$60,000
- Dept of Senior Services \$275,000
- Developer.

More information is available on the city website: <https://www.newtonma.gov/government/seniors/transportation>

Attachment 1: The Livable Sudbury Needs Assessment

Transportation is the second of eight domains of community attributes that the World Health Organization characterized as vital to population health and quality of life: physical, social, economic, psychological, etc. During 2018, researchers from UMass Boston’s John W. McCormack Graduate School of Policy and Global Studies conducted an assessment of the livability of Sudbury. The final report published in 2019 noted:

...In this study, transportation issues relating to driving barriers, traffic, walkability, and overall satisfaction with available transit options emerged as significant issues.... Expanding transportation options for specific segments of the community, such as supported options for those with mobility limitations, was also desirable.

Results from the research showed the following:

- **Transportation is identified as crucial by a wide range of stakeholders:**
 - Families with children under 18 years
 - Residents age 60+
 - Residents of all ages with a participation limitation
 - Residents of all ages who are not financially secure.
- **The range of specific transportation needs identified implies a variety of options to meet them**
 - After-school transportation for children and youth (fixed route, vans)
 - Transportation to medical appointments, social service appointments, respite opportunities such as adult day care, etc. (scheduled and on-demand)
 - Transportation to shopping, appointments, evening, and weekend services, meetings, and socialization opportunities (shuttles, vans, etc.)
 - Affordable transportation to employment venues, childcare facilities, commuter rail, MBTA routes, as well as services similar to the preceding.
- **A number of the transportation options must be both affordable and accessible**
 - 42% of residents with a participation limitation reported they “had missed, canceled, or rescheduled a medical appointment due to lack of transportation.”
 - More than a third of residents who are not financially secure are not satisfied with their “ability to get where they want to go.”
 - Nearly half of residents 60+ are not satisfied with their “ability to get where they want to go.”
- **Transportation gaps affect all livable domains, reducing the overall “livability” and long-term attractiveness of the town**
 - Lack of transportation limits *social participation*
 - Lack of transportation affects overall well-being (*domain of community and health services*)
 - Lack of transportation affects *housing* options and limits access to *outdoor spaces*

Sapienza, DBA; 3.21.22

- Lack of transportation limits *civic participation and employment*
- Lack of transportation can result in segments of the town population “not feeling welcomed” (*respect and social inclusion*).

Attachment 2: Details on Transportation From the Needs Assessment

Table 4. “Which of the following would you use for trips in Sudbury or surrounding communities, if they were available?”

Groups reporting lower interest	Type of transportation	Groups reporting higher interest
	Ride-sharing: 50%	Not financially secure (41%) With a participation limitation (32%)
Age 60+ (1%) With a participation limitation (11%)	Afterschool transportation: 35%	With children under 18 at home (61%)
With children under 18 at home (26%)	Fixed-route, fixed-schedule local bus: 31%	Not financially secure (43%) With a participation limitation (47%)
With children under 18 at home (18%)	On-demand local bus/van: 25%	Age 60+ (38%) Not financially secure (31%) With a participation limitation (63%)
	Taxi service: 20%	With a participation limitation (26%)
With children under 18 at home (6%)	Transportation to medical appointments: 14%	Age 60+ (33%) Not financially secure (33%) With a participation limitation (58%)

Attachment10.e: MATERIALS FROM 9.13 (5614 : Transportation update)

Attachment 3: Examples of Transportation Staff Responsibilities

General Fundraising:

- Grant, foundation proposal writing
- Oversight of grants (tactical and financial performance)
- Relationships/communications with vendors, grant providers, other collaborating towns
- Data gathering and reporting on services provided

Coordination:

- Day to day work with participants in the program
- Technical assistance with registration, application, use of service (CrossTown Connect, taxi dispatch, Uber smartphone app)
- Education of users about all transportation options
- Referral to Tech help, volunteers
- Troubleshooting issues

Current Grant Responsibilities

- Regional meetings organized by Sudbury as lead of 6 towns
- Communication with other town leadership/planning
- Implementation of RFP for consultants, etc.
- Communication with Program Manager consulting firm
- Reporting to town and other entities on services provided
- Taxi company relations
- Creation of online application and database
- Management of online database
- Client relations and tech assistance
- Uber contract management
- Creation of online application and database
- Management of online database
- Client relations and tech assistance
- Uber user contact re: technical assistance, trouble shooting, access for visual or other impairment issues
- Education about transportation options

Attachment 4: Marin County, CA, Illustration

<https://www.tam.ca.gov/overview/>

“The Transportation Authority of Marin (TAM) plays a major role in improving the quality of life for Marin County residents and developing and maintaining the economic viability of our local region by funding transportation projects and programs that improve mobility, reduce congestion, and provide a transportation system with more options for those living, working, visiting and traveling in Marin County.

Thanks to Marin County voter support of transportation funding, we have two revenue sources that are dedicated to transportation projects and programs in Marin County. TAM administers the expenditure plans for Measure A, the ½ cent sales tax measure passed in 2004, renewed as Measure AA in 2018, and Measure B, the \$10 Vehicle Registration Fee passed in 2010. TAM also serves as Marin’s Congestion Management Agency and is responsible for coordinating funding for many of the transportation projects and programs in the County.

Marin Transit and TAM partner with Uber to launch integrated on-demand Connect2Transit Program: TAM, Marin Transit and Uber launched a new program, Connect2Transit, the next phase of TAM’s first/last mile program and the expansion of Marin Transit Connect, Marin Transit’s fully accessible, on-demand service. Beginning July 1, 2020, people in Marin County will have access to a range of new on-demand services. Uber users will now see shared ride transit options and will have access to vouchers for up-to \$5 off shared-ride trips to and from Sonoma Marin Area Rail Transit (SMART) stations in Marin County, major bus stops, and the Larkspur Ferry Terminal.

The program is designed to support transit ridership and encourage shared mobility options that reduce congestion and pollution. UberPool is an affordable option that matches passengers taking a similar route. The technology provides an effective, real-time way to encourage and enable carpooling for first and last-mile access to trips to and from Sonoma Marin Area Rail Transit (SMART) stations in Marin County, major bus stops, and the Larkspur Ferry Terminal.”

CONNECT2TRANSIT FAQs <https://connect2transit.com/faq>

“Simple! Just download the Uber app on your smartphone and use this voucher link. You’ll unlock discounts for shared rides to and from select high-ridership bus, rail, and ferry terminals in Marin County. Sign into your existing Uber account or download and create an Uber account.

You will be prompted to “Accept voucher.” After accepting the voucher, you will be able to enter a destination. If the trip is covered by the voucher, the discount will appear above the “confirm” button. In addition, when older adult riders or individuals with disabilities qualify for Marin Access services, they receive additional discounts on rides booked in the Uber app.

Sapienza, DBA; 3.21.22

What is Marin Connect? Marin Connect is an accessible, on-demand microtransit service provided by Marin Transit. Rides can be booked directly through the Uber app.

Marin Connect started its initial pilot service in 2018 and has continued to grow and change since. Previously, Marin Connect could only be found in the Marin Connect app. Now, Uber has partnered with Marin Transit to bring Marin Connect into the Uber app.

What types of rides are eligible with Marin Connect? Marin Connect is an accessible van ride, operated by Marin Transit and open to the general public. Riders can take Marin Connect rides for trips that start and end within the Marin Connect zone. All vans are accessible and can accommodate riders with mobility devices such as wheelchairs. Each van can also carry up to two bikes!

How can I book a ride on Marin Connect? As long as you are in the service area and requesting between 6:00 am to 7:00 pm (Monday - Friday), Marin Connect will be available in the carousel of options seen in addition to offerings from Uber. This service is available for all members of the public but offers additional discounts for older adults and those with disabilities that qualify for Marin Transit's Marin Access services. Rides booked in the Uber app for Marin Connect are completely on-demand; there is no prescheduling. Riders that cannot book in the app, can call (415) 454-0902 to speak to a Travel Navigator to learn about the program, register for Marin Access, or schedule a ride over the phone. Rides booked over the phone can be prescheduled and require cash payment on-board.

What will I see once I select Marin Connect? Once Marin Connect is selected, you will see a 5-minute countdown clock in order to look for other riders who may be traveling the same direction. You will receive confirmation once you are matched with a Marin Connect vehicle and driver. Please make sure notifications for the Uber app are enabled in the settings on your phone to receive updates.

Who operates the Marin Connect vehicles? Marin Connect services are provided by Marin Transit and operated under contract by Marin Senior Coordinating Council (Whistlestop Wheels). Operators are well trained and monitored by the local transit district. Vehicles used in operation are accessible, Ford Transit vans owned by Marin Transit and maintained by Whistlestop.

How much does a Marin Connect ride cost? A Marin Connect ride is priced based a per mile cost and the distance of the trip for the general public. For riders who are part of the Marin Access program, run by Marin Transit, rides cost \$3.00 per trip. Adding an additional rider to your trip costs another \$1.00. You can see the estimated price of your trip in the app before you request a pickup.

What vehicles are available with Marin Connect? All vehicles operated under the Marin Connect service are Ford Transit passenger vans. Each van can accommodate 5 passengers plus 1

Sapienza, DBA; 3.21.22

wheelchair and up to two bikes. Since vans look similar, colors are used to differentiate rides for pickups at high traffic locations. The app will tell you the color of the van after booking your ride.

How much of a discount is offered, and which rides are eligible for the discount? For eligible trips, riders pay the first \$4.00, and TAM covers the next \$5 on Marin Connect, UberPool, or Uber WAV trips. UberX service is eligible for discounts where UberPool is unavailable.

Are discounts available for riders with disabilities or older adults? Yes, riders who are eligible for [Marin Access](#) services receive a discounted fare (\$3.00) on all Marin Connect trips. To activate this discount or apply for Marin Access services, call a Marin Access Travel Navigator at (415) 454-0902.

Are monthly passes available? The initial launch of the program will not include a monthly pass option. Options are currently being explored to implement this at a later date.

Does my employer cover the cost of my trip? TAM has partnered with the County of Marin and Kaiser Permanente to provide additional discounts for employees who use transit to travel to work. For employees or employers who would like to set up a similar partnership, please [contact TAM.](#)”

¹ Based on input from Metropolitan Area Planning Council (MAPC), 2.11.22.

² Boston Region Metropolitan Planning Organization noted: “There is a ... direct relationship between policies that manage parking supply and policies that manage vehicle trip generation [i.e., parking availability increases SOV use].” Other incentives may be necessary to increase use of pooled ride services.

³³ MAPC, 2.11.22.

⁴ Newton also has a larger industrial/retail tax base than the collaborating towns. However, partnerships are still possible from business, health care/social service, and educational organizations in the collaboration.

⁵ MAPC, 2.11.22.

⁶ These collaborating towns face a complex “transportation authority” challenge—there are at least three regional and one state transportation authorities that will need to collaborate as well. CrossTown Connect, a transportation management association, was established to facilitate cross-authority designs for regional transportation systems.

⁷ MAPC, 2.11.22..

⁸ <https://www.mma.org/newton-launches-on-demand-subsidized-ride-service-for-seniors/>

GoSudbury!

Transportation Programs

Update to Select Board, 13 September
2022

1

Agenda

- Review of last update (4/5/2022)
- Since last update
- Recommendation
- Stakeholder review
- Ties to Sudbury Master Plan
- Five year+ vision
- Conclusion / Next Steps

2

Review of last update (4/5/2022)

The Sudbury Transportation Committee was created by the Select Board to address a key feature of livable communities: transportation. A livable community is defined as

...one that is safe and secure, has affordable and appropriate housing and transportation options, and offers supportive community features and services. ... Well-designed, livable communities promote health and sustain economic growth, and they make for happier, healthier residents — of all ages.

<http://www.aarp.org/livable-communities/net-work-agefriendly-communities/info-2014/an-introduction.html>

3

Review of last update (4/5/2022)

- **Focus was on the GoSudbury! “what”**
- **Product of Livable Sudbury Assessment**
- **Request was for:**
 - Recommendation from high/medium/low options
 - Commitment level from other towns for regionalized approach
 - Picture of grants landscape
- **Today’s focus more on the “who”, “why”, “how” and “when”**

4

Since last update

- **Article 14 at TM2022 passed nearly unanimously**
- **# rides provided April 2022 – August 2022**
 - Uber: 1,159 (avg cost \$19)
 - Taxi: 370 (avg cost \$76)
- **Changes made to program**
 - Increased Uber co-pay modestly
 - # rides/month capped per user of Uber and taxi

5

Since last update

- **Engaged Annex Transit in effort to increase WAV (wheelchair accessible vehicles)**
- **Brand and logo established for nearly half of MAGIC region**
 - Sudbury, Acton, Bolton, Concord, Maynard, Stow
 - via Community Compact pilot: Making the Connections

6

Attachment 10.e: MATERIALS FROM 9.13 (5614 : Transportation update)

Grant Landscape

- **Making The Connections**
 - Full report due to state EOY2022
- **MassDevelopment**
 - Regional application (4 towns)
 - Continuation of MAPC taxi grant
- **MPO technical assistance application**
 - Possibility for grant dollars as well
- **Sudbury Foundation**
 - Application sent March 2022, request was to resend in next funding round

7

Commitment Level of other towns

- **Strong appetite to proceed, but Sudbury has a three year “head start”**
- **Challenges:**
 - Home Rule
 - Sudbury “playbook” not easily transferable because of head start
 - Town staffing capacity
- **Accomplishments**
 - Brand and logo accepted across towns (GOTown)
 - Consultant-run multi-town survey shows needs
 - Staff of multiple towns actively participate in bimonthly meetings
 - Sudbury example widely acknowledged (MAPC focus group, MPO proposal, MassDOT connections, etc.)

8

Recommendation

- **Scenario 3 – regionalized option**
- **Ramp up of 5+ years**
- **Continue with GoSudbury! current level of service and augment**
- **Proof of concept initiatives, medium & long-term initiatives**
- **Transition to program features as warranted**

9

Stakeholder Review (the “who” for Sudbury)

```

    graph TD
      A((PERSON NEEDING RIDE)) --> B((GO SUDBURY!))
      B --> C((PROVIDERS OF RIDE SERVICES))
      C --> A
      D((ORGANIZATIONS WITH FUNDS AND TECHNICAL ASSISTANCE)) --> B
      E((LEGISLATORS)) --> B
      F((SUDBURY VOTERS AND TAXPAYERS)) --> B
      G((SUDBURY DEPARTMENTS AND COMMITTEES)) --> B
      H((NEIGHBORING TOWNS IN REGION)) --> B
  
```

10

Ties to Sudbury Master Plan (the “why”)

- **Master Plan Action Matrix**
<https://sudbury.ma.us/planning/wp-content/uploads/sites/328/2021/10/Action-Plan.pdf?version=bb570f61cd5a9e6ca4ffa9cbe705a6e9>
- **Direct ties to multiple action items (and indirect to many more)**
 - ROUTE 20 CORRIDOR **A7, B1, B4**
 - TRANSPORTATION AND CONNECTIVITY **A2, A3, E1, E4, E5, E6**
 - TOWN FACILITIES SERVICES, INFRASTRUCTURE **A1, D5**
 - RESILIENCY **C3**
 - PUBLIC HEALTH AND SOCIAL WELL BEING **D1, D2**

11

Five Year+ Vision (the “how” and “when”)

Type of Initiative	FY22-3	FY23-4
Services Provided	GoSudbury! Uber and Taxi (current)	GoSudbury! Connecting (to RTA/MBTA)
Proof of concept	<ul style="list-style-type: none"> • In-town short fixed routes • Destination fixed routes • Microtransit spoke-to-(few) hubs 	<ul style="list-style-type: none"> • In-town short fixed routes • Destination fixed routes • In-town fixed routes to RTA connections • Microtransit spoke-to-(multiple) hubs
Medium-term		<ul style="list-style-type: none"> • Incorporation of (few) employer transit partners • Incorporation of (few) social service org. partners
Long-term		<ul style="list-style-type: none"> • In-town and destination fixed routes to RTA, MBTA, commuter rail connections • Microtransit spoke-to-fixed route hubs to RTA, MBTA, commuter rail connections
Resource's req'd for Sudbury	n/a	Level funding from FY23; \$100,000
Engage with:	Planning Board/Dept-Master Plan MWRTA - CatchConnect? Partner towns	DEI, Energy (MPO "Destination 2040 Vision, Goals, and Objectives"), partner towns
Help Needed (e.g. legislators)	MPO/CTPS Tech Assistance (feedback due Oct 1)	State MPO / State DOT Select Board / Town Manager State Legislators
Challenges	Sudbury "head start" over other towns, CTC role, municipal home rule issues, MWRTA change in leadership, cross-RTA travel, town staffing challenges	Municipal home rule issues, RTA collaboration, town staffing challenges

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Five Year+ Vision (the “how” and “when”)

Type of Initiative	FY24-5	FY25-6
Services Provided	GoSudbury! Connecting (to RTA/MBTA)	GoMAGIC! (similar services with regionalization across MAGIC Communities)
Proof of concept	<ul style="list-style-type: none"> • Throughtown fixed routes • Throughtown microtransit spoke-to-hubs • Workforce development routes (transit for employees) 	<ul style="list-style-type: none"> • Throughtowns fixed routes • Throughtowns microtransit spoke-to-hubs • Workforce development routes include day (child, adult) care
Medium-term	<ul style="list-style-type: none"> • Incorporation of (multiple) employer transit partners • Incorporation of (multiple) social service org. partners 	<ul style="list-style-type: none"> • Transportation system infrastructure determined
Long-term	<ul style="list-style-type: none"> • Regional workforce development transportation system ID'd • Multiple employer/social service org. incorporated in system planning, design 	<ul style="list-style-type: none"> • Regional workforce development transportation system designed, planned, spec'd • Multiple employer/social service org. partner with transit providers
Resource's req'd for Sudbury	\$150,000 (FY23 NPV) + Addition of part time staff	\$175,000 (FY23 NPV) + Additional services
Engage with:	RTAs, Commercial/Healthcare partners, partner towns	RTAs, Commercial/Healthcare partners
Help Needed (e.g. legislators)	State MPO / State DOT Select Board State Legislators	State DOT Federal (FTA)
Challenges	Municipal home rule issues, partner town staffing challenges	

Five Year+ Vision (the “how” and “when”)

Type of Initiative	FY26-7 and beyond	
Services Provided	GoMAGIC! (similar services with regionalization across MAGIC Communities)	
Proof of concept	<ul style="list-style-type: none"> • Regional fixed routes • Regional micro-transit spoke-to-hubs • Workforce development routes include day (child, adult) care, education, training, etc. 	
Medium-term	<ul style="list-style-type: none"> • Transportation system infrastructure designed, planned, spec'd 	
Long-term	<ul style="list-style-type: none"> • Portions of region pilot system and follow plan, do, study, act (CQI process) 	
Resource's req'd for Sudbury	\$220,000 (FY23 NPV) + Additional services	
Engage with:	TBD	
Help Needed (e.g. legislators)	State DOT Federal (FTA)	
Challenges	TBD	

Conclusion / Next Steps

- Request level funding for FY23/24 i.e. \$100,000
- Feedback from Select Board to Transportation Committee to proceed and attempt to grow program (?)

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Appendix

16

Stakeholder Review (more who's who)

MAPC: Metropolitan Area Planning Council

- A state regional planning agency
- Its transportation department promotes sustainable transportation & infrastructure
- Boston region MAPC has 101 muni's including Sudbury
- Sudbury's MAPC sub-region of 13 towns is Minuteman Advisory Group on Interlocal Collaboration - MAGIC

MPO: Metropolitan Planning Organization

- Federally required
- Transportation policy-making
- Boston region MPO has 97 muni's, including Sudbury
- 22 MPO's work with MassDOT under Executive Office of Transportation
- Similar boundaries as Regional Transit Authority areas

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Stakeholder Review (more who's who)

MassDOT Rail and Transit Division

- Oversees 15 MA Regional Transit Authorities (RTAs) and commuter rail
- Works with Massachusetts Bay Transportation Authority – MBTA
- Created RTA Council to share info on best practices, etc.
- Runs Community Transit Grant Program

MWRTA: MetroWest Regional Transit Authority

- Serves 32-town, I-495/MetroWest corridor including Sudbury
- Funds from federal and state agencies, local assessments and fare box recovery
- RTAs are in both state and federal organizational and funding structures

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GoSudbury! Narrative Use Cases

- The goal of the 5-year Go Sudbury! plan is to create a regional GoSudbury program for Sudbury and collaborating towns' eligible residents who need transportation. Eligible residents will be able to register for a program that provides varied transportation options to an expanded geographic area with extended operating hours. Transportation will be available for the many needs we all have, including transportation to medical, social, educational, work, civic and other purposes. Destinations will include local, regional and extended locations. And, our goal is to connect to commuter rail, MBTA, and regional transit authority services.
- The regional collaboration will offer more convenient, on-demand, transportation options for residents in the participating towns. Towns will have a financial commitment to support the program and will benefit from the cost savings of a larger service area and more central coordination. The plan is to ensure that transportation companies utilized for the service will be able to scale up staff and vehicles to more efficiently meet the needs of a larger area.
- Below are five fictional, but likely, scenarios of individuals who could access the current GoSudbury program and who would benefit from a sustainable, resilient regional "GoSudbury" or "GoMagic" or similar program going forward.

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GoSudbury! Narrative Use Case I

Mary lives in a single-family home in Sudbury. She is 69 years old and has been active, working until last year, but is now retired. She has enjoyed getting to know her neighbors and community since retiring and has been driving to the library to volunteer, as well as driving to attend a local crafters group in the evening once a week. Unfortunately, Mary needed surgery for an eye problem and is unable to drive herself for 6 weeks. Mary is widowed and her family does not live nearby.

Fortunately, Mary found out about the GoSudbury program. She is eligible for the Sudbury Connection Senior Center van service, as well as the GoSudbury Uber and Taxi programs. She will use the Taxi program to get to her follow-up surgeon appointments in Boston during her convalescence. Because the GoSudbury Uber program is available 24 hours a day, Mary will use Uber to continue to attend her crafts group meetings in the evening. During the day, she will use the Sudbury Connection van from the Senior Center to get to her volunteer work at the library. Since Mary is living with a small Social Security payment as her only income, she is thankful that these transportation options will allow her to continue her activities and get to appointments without an exorbitant cost.

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GoSudbury! Narrative Use Case 2

Jacob lives with his family in Sudbury. He is a young adult with a medical condition that prohibits driving. Jacob recently found a job in Wayland. His shift starts at 8:00 AM and ends at 4:00 PM. His parents both work and have difficulty getting him to work every day of the week. Jacob will be able to use the GoSudbury Uber program to get to work and back home for about two weeks each month. (The program allows for 20 one-way rides (or 10 round trips) per month.) This allows Jacob the independence to schedule some of his transportation by himself, and also provides a financial savings for him and his family.

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GoSudbury! Narrative Use Case 3

Mrs. Smith lives in Sudbury and has chronic medical conditions that affect her ability to perform her activities of daily living such as preparing meals, doing laundry, cleaning house and bathing. Her at-home independence, health and safety are maintained by the services of her home health aide Anna 5 days each week.

Anna is a resident of Maynard. She works as a home health aide for older adults in Sudbury, including Mrs. Smith. Her car needs work and won't be ready for two weeks. Anna is financially eligible for the GoSudbury program. Because Anna works in Sudbury, she is eligible to use the GoSudbury Uber program for the two weeks that her car is not in service. This will enable her to continue to meet the needs of Mrs. Smith as well as her other Sudbury clients during this period of time.

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GoSudbury! Narrative Use Case 4

Mr. Eliot lives in Sudbury and is a frequent shopper at Sudbury Farms. He enjoys chatting with the cashier, Marvin, while paying for his groceries. Marvin lives in Wayland but travels to Sudbury several days each week to work at Sudbury Farms. Because of his varying schedule, Marvin has been paying for Uber rides to work. This has been quite expensive and Marvin has considered leaving his position. Sudbury Farms Store Manager Ms. Jones is concerned that she will lose a valuable employee.

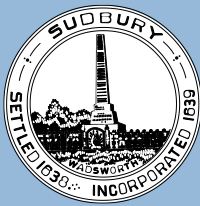
Recently, Marvin learned from town of Wayland that they have joined with the town of Sudbury and other towns to start a new regional transportation program. Marvin will be eligible to utilize the new transportation service to get to work. Mr. Eliot was pleased to hear this from Marvin as he enjoys talking with him. Store Manager Jones was very happy to find out that Marvin will be continuing to work at Sudbury Farms and she will not need to hire and train someone new.

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GoSudbury! Narrative Use Case 5

Ms. Green lives in Stow and works in Boston. When her car was out of service last, she felt stranded and had trouble using Microtransit because there were not enough drivers. She recently learned from a friend who lives in Maynard about the new regional transportation service. Ms. Green will be able to use a shuttle to get to her commuter rail station instead of driving and paying to park. She also was happy to hear about the availability of a Microtransit, like Lyft, that will have drivers available because of regional demand. She can use this to get to the supermarket, visit a friend or go to the library in Stow or surrounding towns when her car is being serviced.

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SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

11: 2023 Newsletter Deadlines

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Discuss and possible vote to approve proposed 2023 Municipal Update Newsletter Schedule of Deadlines for Select Board assignment, submission and approval.

Recommendations/Suggested Motion/Vote: Discuss and possible vote to approve proposed 2023 Municipal Update Newsletter Schedule of Deadlines for Select Board assignment, submission and approval

Background Information:
Attached

Financial impact expected:N/A

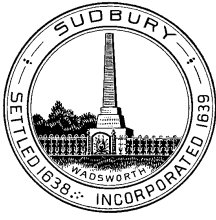
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



Town of Sudbury

Select Board Office

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278 Old Sudbury Rd
Sudbury, MA 01776-1843
978-639-3381
Fax: 978-443-0756

sbadmin@sudbury.ma.us

Date: November 21, 2022

To: Select Board

From: Leila Frank

Re: **2023 Municipal Update Newsletter Schedule of Deadlines**

Please see below proposed schedule for assignment, submission and approval deadlines for the Select Board's submissions to the 2023 Municipal Update Newsletter. The newsletter will be posted on the website and sent to the email subscriber list on the business day following the Board's approval when possible.

WINTER

SB Meeting to Discuss Topic Assignments- Tuesday, Jan 10

Submission Deadline- Monday, Jan 30

SB Meeting Approval- Tuesday, Feb 14

SPRING

SB Meeting to Discuss Topic Assignments- Tuesday, April 4

Submission Deadline- Monday, May 15

SB Meeting Approval- Tuesday, May 30

SUMMER

SB Meeting to Discuss Topic Assignments- Tuesday, July 11

Submission Deadline- Monday, July 31

SB Meeting Approval- Tuesday, August 15

FALL

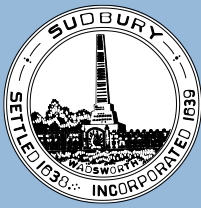
SB Meeting to Discuss Topic Assignments- Tuesday, October 10

Submission Deadline- Monday, October 30

SB Meeting Approval- Tuesday, November 14

Previous editions of the Municipal Update Newsletter can be found here:

<https://sudbury.ma.us/municipal-updates-newsletters/>



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

12: Minutes Review

REQUESTOR SECTION

Date of request:

Requestor: Chair Russo

Formal Title: Vote to review and possibly approve the open session minutes of 9/13/22.

Recommendations/Suggested Motion/Vote: Vote to review and possibly approve the open session minutes of 9/13/22.

Background Information:
attached draft

Financial impact expected:

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM

SUDBURY SELECT BOARD

TUESDAY, SEPTEMBER 13, 2022

(Meeting can be viewed at www.sudburytv.org)

Present: Chair Charles Russo, Vice-Chair Janie Dretler, Select Board Member Daniel Carty, Select Board Member LisaKouchakdjian, Select Board Member Jen Roberts, Interim Town Manager Maryanne Bilodeau

The statutory requirements as to notice having been compiled with, the meeting was convened at 7:05 PM., via Zoom telecommunication mode.

Chair Russo announced the recording of the meeting and other procedural aspects included in the meeting.

Call to Order/Roll Call

Select Board Roll Call: Roberts-present, Kouchakdjian-present, Carty-present, Dretler-present, Russo-present

Opening Remarks by Chair

- Community Preservation Committee now accepting project applications
- Capital Improvement Advisement Committee seeking new member
- Park & Recreation Fall Fest scheduled this Saturday, September 17 at Haskell Field; 3:30 PM to 7:00 PM; live music, food trucks and more

Reports from Interim Town Manager Bilodeau

- Community Preservation Committee Application Submissions for FY24 funding are due Friday, October 7, 2022 at 12:30 PM
- Recognized the Energy and Sustainability Committee for voting in favor of funding the salary of the Sustainability Coordinator, over the next three years. The position is posted, and resumes will be accepted through 12 Noon October 19

Reports from Select Board

Vice-Chair Dretler:

- Thanked Interim Town Manager Bilodeau for her work on securing the Sustainability Coordinator position; the Board will continue to request legislative funding
- Thanked Sept 11th Memorial Committee for the special tribute on 9/11 with public safety officials and residents continuing to honor those lost

Board Member Kouchakdjian had nothing further to add.

Board Member Roberts:

- Attended last night's Finance Committee meeting included discussion with new members and discussed financial policies regarding capital planning, as well
- Board of Health meeting today; Director Murphy said mosquito-borne illnesses (in the 3rd year of the EEE cycle - handful of West Nile cases. Reminded all to remove any still water on their properties.

- Worked with Janine Taylor, member of the DEI Commission, on updates to the DEI Mission Statement, which will be reviewed by the Commission at their meeting this week for Select Board approval later this month
- Reminded that Public Comment is taken for items not on the agenda

Board Member Carty:

- Attended the Town September 11th memorial ceremony, and mentioned the dedication and efforts of Sudbury public safety officials and the Memorial Garden Oversight Committee; it has been 21 years since that tragic event
- Mentioned the Mishoon project, the Native American tradition celebration at the Wayside Inn, involving creating a canoe; the launching of the canoe will take place this Saturday, September 17 from 12:00 PM to 2:00 PM
- Select Board Office Hours did not take place this week due to scheduling conflicts; moved to Friday, September 23rd from 12:30 PM to 1:30 PM

Public Comments on items not on agenda

None

Interview candidate for Council on Aging. Following interview, vote whether to appoint Paul Marotta, 71 Pelham Island Road, to the Council on Aging for a term expiring 5/31/23.

Present: Paul Marotta, 71 Pelham Island Road

Mr. Marotta stated he was a life-long resident of Sudbury, and had been in the Air Force. Much of his professional background involved accounting/business.

Chair Russo noted the Council on Aging unanimously voted to appoint Mr. Marotta.

Chair Russo read in the words of the motion. Vice-Chair Dretler moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Kouchakdjian-aye, Roberts-aye, Carty-aye, Dretler-aye, Russo-aye

VOTED: To appoint Paul Marotta, 71 Pelham Island Road, to the Council on Aging for a term expiring 5/31/23.

Meet with Community Paradigm to discuss next steps and Screening Committee. Bernard Lynch from Community Paradigm Associates to attend

Present: Bernard Lynch, John Petrin, Sharon Flaherty – Community Paradigm Associates (CPA)

Mr. Lynch detailed that the Board could utilize a screening committee to help with the Town Manager selection process, or opt to consider the use of a professional panel, in combination with scheduling a related community forum.

CPA professionals provided summary of their professional backgrounds.

Board Member Roberts motioned that CPA conduct the screening of Town Manager candidates by instituting a professional panel and provide the Select Board with three or four finalists. Vice-Chair Dretler seconded the motion.

It was on motion 5-0; Roberts-aye, Kouchakdjian-aye, Carty-aye, Dretler-aye, Russo-aye

VOTED: That CPA conduct the screening of Town Manager candidates by instituting a professional panel, and provide the Select Board with three or four finalists.

Mr. Lynch detailed that Town Manager resumes are due by October 7, 2022, and the goal would be to select the finalists by the third week in October, with interviews to take place within the first two weeks of November.

Sudbury Transportation Committee Update

Present: Bob Liberman, Kay Bell, Dan Carty and Alice Sapienza, Sudbury Transportation Committee Members

Board Member Carty opened the meeting of the Sudbury Transportation Committee at 7:51 PM. Roll call was taken: Sapienza-present, Bell-present, Lieberman-present, Carty-present.

Board Member Carty presented program updates since April 5, 2022; Article 14 passed nearly unanimously at the 2022 Town Meeting. He noted that from April through August Uber has provided 1,159 rides and the Taxi program has provided 374 rides. Several changes made to the program included modest increase with Uber co-pays and number of rides per month capped. Board Member Carty explained the program has engaged Annex Transit to provide wheelchair-accessible vehicles.

Board Member Carty stated the “Making the Connections” program stopped because of COVID, and has resumed thanks to a grant extension to December 2022. He mentioned submission of the MPO Technical Assistance application.

Mr. Lieberman stated a regional approach would provide more flexibility/options. He acknowledged that assistance from COA has helped residents with enrollment.

Board Member Carty recognized the Planning and Community Development Department has contributed much towards this effort.

Transportation Committee Members concurred that program regionalization might take as long as five years to be fully running.

Committee Members presented various initiatives, and yearly projections extending to FY27 and beyond

Board Member Carty concluded that Select Board feedback/support was needed in order to proceed with transportation planning.

Chair Russo favored maintaining the present program, and looking to go forward with next steps. Ms. Sapienza suggested the Transportation Committee come back to the Board in late October and provide more information with an MPO update regarding funding.

Resident Manish Sharma suggested that local drivers might be interested in getting more work.

Board Member Carty motioned to close the Sudbury Transportation Committee joint meeting with the Select Board. Ms. Bell moved in the words of the Transportation Chair. Mr. Lieberman seconded the motion.

It was on motion 4-0; Bell-aye, Sapienza-aye, Lieberman-aye, Carty-aye

VOTED: To close the Sudbury Transportation Committee meeting with the Select Board.

Discuss and possibly vote to have the Sudbury Select Board liaison to Lincoln-Sudbury School Committee (LSSC) inquire of the LSSC Chair the current status of the LSSC Subcommittee established to discuss the Lincoln-Sudbury Regional School Agreement and report back to the Sudbury Select Board accordingly.

Board Member Carty noted it had been 18 months since the LSSC Subcommittee considered the Lincoln-Sudbury Regional School Agreement.

As the LSSC liaison, Board Member Kouchakdjian confirmed she would present related update to the Select Board.

Chair Russo suggested that Board Member Kouchakdjian review a MARS (Massachusetts Association of Regional Schools) presentation regarding best practices for regional school agreements.

Update on Vocational Schools and letters of application to Vocational School Districts

Board Member Kouchakdjian provided update about her interactions with the four Vocational School Districts. She mentioned that Medford did not return the call she made, and that she had a good meeting and tour at the Minuteman Vocational Education School.

Board Member Kouchakdjian confirmed that both Nashoba Valley Technical School and Minuteman Vocational School had waiting lists at this time.

Related discussion among Board Members took place. Vice-Chair Dretler asked if the Select Board had the authority to send these letters. Board Member Kouchakdjian responded in the affirmative adding it is the responsibility of the Town and the Board has made such decisions in the past. Board Member Carty concurred such letters were within the purview of the Board, and this consideration is related to the Lincoln-Sudbury Regional Agreement which has not been addressed in 18 months.

Chair Russo motioned to release the four letters and incorporating edits as suggested by Superintendent Wong to the four vocational educational districts identified in the packet, including the language: “The Town of Sudbury is in the process of determining options to becoming a member of a vocational education school. This letter serves as a formal request to engage with *school to be named* for consideration of becoming a member.” Board Member Roberts moved in the words of the Chair. Board Member Kouchakdjian seconded the motion.

It was on motion 5-0; Kouchakdjian-aye, Dretler-aye, Carty-aye, Roberts-aye, Russo-aye

VOTED: To release the four letters and incorporating edits as suggested by Superintendent Wong to the four vocational educational districts identified in the packet, including the language: “The Town of Sudbury is in the process of determining options to becoming a member of a vocational education school. This letter serves as a formal request to engage with *school to be named* for consideration of becoming a member.”

Chair Russo defined *school to be named* referring to the individual letters being sent to the Keefe Vocational Technical School, the Nashoba Valley Technical School, the Assabet Valley Vocational Technical School, Minuteman Vocational School. Members agreed not to send the letter to the Medford Vocational Technical High School at this time.

Chair Russo stated this topic will be discussed in two weeks.

Review and possible vote to update and/or accept Sudbury’s Board of Selectmen Statement of Mission and Values for Determining Goals last updated in 2005

Vice-Chair Dretler presented the “Board of Selectmen Statement of Mission and Values for Determining Goals,” and suggested that Board Members assist in updating the language in the document.

Members agreed to review the document and make recommendations.

Chair Russo confirmed the Board would revisit the topic in four weeks.

Vote on a letter of support for Camp Sewataro Camp Operator Special Permit Application to the Planning Board, to expand the number of campers

Interim Town Manager Bilodeau confirmed that Town Counsel Lee Smith, had reviewed the request for Special Permit for Camp Sewataro, which will be included on the November 14th ZBA agenda.

Chair Russo commented that the Select Board had previously agreed to send ZBA a letter of support regarding this matter. He added that a brief endorsement letter would be in compliance with the Select Board’s agreement with Camp Sewataro. Board Member Kouchakdjian indicated the matter reflected a lease agreement, and she was not a Select Board Member when these matters were publicly considered.

Vice-Chair Dretler indicated that additional information regarding ADA Title II and Title III from legal counsel and the Planning Board would be beneficial before a vote was taken.

Resident Manish Sharma asked why KP Law was being consulted regarding this matter. Chair Russo responded KP Law serves the Town.

Scott Brody, Camp Sewataro Operator, commented that the Board was not acting in good faith, and such a delay might affect the granting of the Special Permit. He stressed that ADA compliance is important to him, and indicated that Town Counsel would likely reach the same conclusion that his lawyer did, regarding Title II classification.

Public Comment on items not on the agenda

Resident Manish Sharma, 77 Colonial Road, asked about water quality and the testing of the water from the Sudbury school bubblers. Chair Russo responded that school infrastructure concerns go through the School Department.

Resident Kevin LaHaise, 195 Horse Pond Road, asked about profits made by Camp Sewataro, indicating that the deal with Sewataro is lopsided and flawed. He stressed that the Town must do better, and advocate for residents and taxpayers.

Vote to review and possibly approve the open session minutes of 6/28/22, 7/6/22, and 8/15/22

6/28/22

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Vice-Chair Dretler seconded the motion.

It was on motion 5-0; Dretler-aye, Kouchakdjian-aye, Roberts-aye, Carty-aye, Russo-aye

VOTED: To approve the Select Board Minutes of 6/28/22, as edited

7/6/22

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Kouchakdjian-aye, Roberts-aye, Carty-aye, Russo-aye

VOTED: To approve the Select Board Minutes of 7/6/22, as edited

8/15/22

Chair Russo read in the words of the motion. Vice-Chair Dretler moved in the words of the Chair. Board Member Carty seconded the motion.

It was on motion 5-0; Dretler-aye, Kouchakdjian-aye, Roberts-aye, Carty-aye, Russo-aye

VOTED: To approve the 8/15/22 Joint Meeting Minutes with the School Committee.

Upcoming agenda items

9/27/22:

- KPI Updates
- DEI Updates and Mission Statement
- Update on Sewataro – if ready
- Sustainability Coordinator Update
- Vocational Education Updates if ready

10/24, 11/1 or 11/3:

- SB Goal Setting Mission Statement Update/Review

Future:

- Discussion around business/economic committee
- Housing Bylaw
- ADA Transition Plan Update

Consent Calendar

Vote to approve an award of a two-year contract to Girard & Associates, LLC by the Town Manager as a sole source procurement for services to be provided for the Fire Department's Advanced Life Support Program involving quality assurance/quality control, in the amount of \$17,800 per year, for a two-year contract.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To approve an award of a two-year contract to Girard & Associates, LLC by the Town Manager as a sole source procurement for services to be provided for the Fire Department's Advanced Life Support Program involving quality assurance/quality control, in the amount of \$17,800 per year, for a two-year contract

Vote to accept the resignation of Paula Hudson, 20 Adams Road, from the Diversity, Equity, and Inclusion Commission, effective immediately, and send a thank you letter for her service to the Town.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To accept the resignation of Paula Hudson, 20 Adams Road, from the Diversity, Equity, and Inclusion Commission, effective immediately, and send a thank you letter for her service to the Town.

Vote to accept the resignation of Susan Abrams, 24 Hudson Road, from the Diversity, Equity, and Inclusion Commission, effective immediately, and send a thank you letter for her service to the Town.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To accept the resignation of Susan Abrams, 24 Hudson Road, from the Diversity, Equity, and Inclusion Commission, effective immediately, and send a thank you letter for her service to the Town

Vote to appoint members Janie Dretler and Dan Carty to the Small Wireless Subcommittee for a term expiring 5/31/23.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To appoint members Janie Dretler and Dan Carty to the Small Wireless Subcommittee for a term expiring 5/31/23

Vote to appoint Board member Dan Carty as Sudbury's designee to the MBTA Advisory Board for a term expiring 5/31/23.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To appoint Board member Dan Carty as Sudbury's designee to the MBTA Advisory Board for a term expiring 5/31/23

Vote to accept the Declaration of Restrictive Covenants and Grant of Easement regarding the Stormwater Management System for the property at 105 Boston Post Road, subject to the Stormwater Management Permit issued for the property.

Chair Russo read in the words of the motion. Board Member Kouchakdjian moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Dretler-aye, Carty-aye, Roberts-aye, Kouchakdjian-aye, Russo-aye

VOTED: To accept the Declaration of Restrictive Covenants and Grant of Easement regarding the Stormwater Management System for the property at 105 Boston Post Road, subject to the Stormwater Management Permit issued for the property

Approve award by the Town Manager of a contract between the Town and PARE Corporation for engineering services to be performed relative to Cricket Pond in Heritage Park pursuant to Contractor's proposal (number GP288.22) dated August 5, 2022, in the amount of \$26,500, and further, to execute all documents relative to said contract inclusive of amendments, if any.

After some discussion, Interim Town Manager Bilodeau suggested that a vote be taken, and Staff would check with DPW Director Dan Nason.

Chair Russo motioned to approve award by the Town Manager of a contract between the Town and PARE Corporation for engineering services to be performed relative to Cricket Pond in Heritage Park pursuant to Contractor's proposal (number GP288.22) dated August 5, 2022, in the amount of \$26,500, and further, to execute all documents relative to said contract inclusive of amendments, in compliance with all Town Boards/Committees, and regulations, as needed. Vice-Chair Dretler moved in the words of the Chair. Board Member Kouchakdjian seconded the motion.

It was on motion 5-0; Roberts-aye, Carty-aye, Dretler-aye, Kouchakdjian-aye, Russo-aye

VOTED: To approve award by the Town Manager of a contract between the Town and PARE Corporation for engineering services to be performed relative to Cricket Pond in Heritage Park pursuant to Contractor's proposal (number GP288.22) dated August 5, 2022, in the amount of \$26,500, and further, to execute all documents relative to said contract inclusive of amendments, in compliance with all Town Boards/Committees, and regulations, as needed.

Vote whether to accept the following expenditure limits for the Town Trust Funds for Fiscal Year 2023: Goodnow Library \$35,000; Rhodes Memorial \$600; Lydia Raymond \$100; Forrest Bradshaw \$100; Cheri-Anne Cavanaugh \$1,000; Raymond Scholarship \$1,000; Discretionary \$4,000; Sept. 11 Memorial \$2,000; Perpetual Care \$70,000, for a total of \$113,800, as requested by Dennis Keohane, Finance Director.

Board Member Kouchakdjian expressed concern about the Goodnow Library Trust Fund. Chair Russo explained the fluctuations were reflective of the market changes.

Chair Russo read in the words of the motion. Board Member Carty moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Roberts-aye, Carty-aye, Dretler-aye, Kouchakdjian-aye, Russo-aye

VOTED: To accept the following expenditure limits for the Town Trust Funds for Fiscal Year 2023: Goodnow Library \$35,000; Rhodes Memorial \$600; Lydia Raymond \$100; Forrest Bradshaw \$100; Cheri-Anne Cavanaugh \$1,000; Raymond Scholarship \$1,000; Discretionary \$4,000; Sept. 11 Memorial \$2,000; Perpetual Care \$70,000, for a total of \$113,800, as requested by Dennis Keohane, Finance Director

Resident Susan Pettit, 84 Pokonoket Avenue, stated she submitted a letter to the Select Board to express her concern about consistent funding requested by the Library, and asked why the Select Board would approve these dollar amounts, without performing due diligence. She requested this be voted upon at another time. Vice-Chair Dretler stated that she saw no email from Ms. Pettit, and suggested she send the communication to the whole board. Chair Russo reiterated the funds are doing fine, and adjusting to market trends, but funds are always welcomed.

Vote to approve the Town of Sudbury, through its Historical Commission and Historic Districts Commission, to become a Certified Local Government with the Massachusetts Historical Commission.

Chair Russo explained the Certified Local Government designation would advance grant opportunities. Historical Commission Member Chris Durall, 14 Haden Circle, noted that the purpose for becoming a Certified Local Government, is to increase eligibility for funding grants. He stated that the Historical Commission Members would present a more in-depth presentation for the Board at an upcoming meeting.

Chair Russo read in the words of the motion. Vice-Chair Dretler moved in the words of the Chair. Board Member Kouchakdjian seconded the motion.

It was on motion 5-0; Roberts-aye, Dretler-aye, Kouchakdjian-aye, Carty-aye, Russo-aye

VOTED: To approve the Town of Sudbury, through its Historical Commission and Historic Districts Commission, to become a Certified Local Government with the Massachusetts Historical Commission

Adjourn

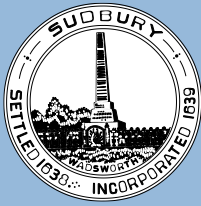
Chair Russo read in the words of the motion. Vice-Chair Dretler moved in the words of the Chair. Board Member Roberts seconded the motion.

It was on motion 5-0; Kouchakdjian-aye, Roberts-aye, Dretler-aye, Carty-aye, Russo-aye

VOTED: To adjourn the Select Board Meeting.

There being no further business, the meeting was adjourned at 11:17 PM.

DRAFT



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

13: Public Comments (cont)

REQUESTOR SECTION

Date of request:

Requested by: Patty Golden

Formal Title: Public Comments (cont)

Recommendations/Suggested Motion/Vote:

Background Information:

Financial impact expected:

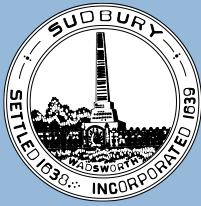
Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

MISCELLANEOUS (UNTIMED)

14: 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:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

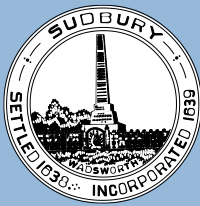
12/06/2022 6:00 PM

POTENTIAL UPCOMING AGENDA ITEMS/MEETINGS

MEETING/EVENT	DESCRIPTION
Dec. 13 (addl mtg)	First Parish Lease/License
	Discussion on Town Meeting Warrant articles: Sudbury Housing Trust; Transportation; Small Wireless Facility
	CIAC candidate interview
	Energy Committee candidate interview
	DEI Commission candidate interviews
Dec. 20	Annual License Renewals (Alcohol/Common Victualler)
	Update with Eversource (7:45 PM requested)
	KPI update
	Small Cell Wireless Subcommittee update
	Sewataro Financials
	Financial condition of the Town
	ARPA update
High priority items	Goal-setting update
	Energy Committee update/potential candidate interview
	Discussion on recent Board/Committee resignations (per Dan Carty)
	Town Counsel evaluation (before 12/31)
	MBTA communities discussion (with Planning Board)
	Friends of BFRT - change to a Town commission?
	Voc Ed update (Lisa K.)
	LS agreement
	Sewataro – looking ahead at Director’s plan for investments into improvements as per operator contract
	Mass Central Rail Trail/DCR
Date to be determined	Remote Meeting Policy (Lisa K.)
	Interview candidate for Energy Committee
	Capital Process
	Citizen Leadership Forum (Govt and how it works)
	Climate Emergency declaration & sustainability director
	Discussion on Civics projects for SPS/LS/Scouts
	Discussion on Select Board meeting flow, process, efficiency, and decorum
	Discussion on potential ADA policy
	Discussion on Town Manager Task Requests
	SB self-evaluation process individually and collectively (Lisa K)
	Fairbank Community Center update (ongoing)
	Goal setting update (deliverables)
	Pets in cemeteries
	Health/COVID-19 update
	Investment Advisory Committee
	Invite Commission on Disability Chair to discuss Minuteman High School
	Local receipts – fee schedule review (Chair Russo)
	Bi-monthly update from Eversource (Oct, Dec, Feb, Apr, June, Aug)

Attachment 14.a: Upcoming items 12.06.22 (5489 : Upcoming agenda items)

	Quarterly review of approved Executive Session Minutes for possible release (February, May, August and November). Consider separate meeting solely for this purpose.
	Quarterly update from Diversity, Equity and Inclusion Commission (DEI) (December, March, June, September)
	Quarterly update on Bruce Freeman Rail Trail (BFRT) (March, June, September, December)
	Quarterly update on Key Performance Indicators (KPIs) projects to track (December, March, June, September)
	Peakham Road Speed Limits (citizen request)
	Route 20 empty corner lot – former gas station
	Select Board Retreat (Vice Chair Dretler) and SB statements
	Sidewalks discussion
	Solar Panels
	Subcommittee discussion (Executive)
	Town meeting recap – year in review
	Town-wide traffic assessment and improve traffic flow
	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
Standing Items for All Meetings	Select Board requests for future agenda items at end of meeting
	Public Comments, continued (if necessary)



SUDBURY SELECT BOARD
Tuesday, December 6, 2022

CONSENT CALENDAR ITEM

15: Accept donation to Commision on Disability

REQUESTOR SECTION

Date of request:

Requested by: Leila S. Frank

Formal Title: Vote to accept a donation of \$30 to the Commission on Disability, account 118348/483100: Handicap Parking Contributions & Donations, from Patricia A Brown, 34 Whispering Pine Road.

Recommendations/Suggested Motion/Vote: Vote to accept a donation of \$30 to the Commission on Disability, account 118348/483100: Handicap Parking Contributions & Donations, from Patricia A Brown, 34 Whispering Pine Road.

Background Information:

Financial impact expected:\$30 to Commission on Disability

Approximate agenda time requested:

Representative(s) expected to attend meeting:

Review:

Select Board Office	Pending
Town Manager's Office	Pending
Town Counsel	Pending
Select Board	Pending
Select Board	Pending

12/06/2022 6:00 PM