

Date: January 4, 2008

Subject: Sudbury Budget Review Task Force Minutes from December 10, 2007

From: K. Massey

To: Bob Jacobson, Co Chairman
Marty Ragonas, Co Chairman

List:

| Members in Attendance (marked by √) | Guests in Attendance |
|---|----------------------------------|
| √ Robert N. Jacobson, Co-Chair | |
| √ Martha M. Ragonas, Co Chair | Jody Kablack, Town Planner/Dr of |
| A Bill Braun, Designee | Planning & Community Development |
| √ Jeffrey Beeler, Member SSC | Jim Jacobson, FinCom |
| A William E. Kneeland, Jr., Acting Co-Chair | Jamie Gossels, FinCom |
| √ Ralph F. Verni, Acting Co-Chair | |
| √ Miner A. Crary, Citizen | |
| √ Daniel C. Difelice, Citizen | |
| A Tammie Dufault, Citizen | |
| A Paul Fuhrman, Citizen | |
| √ Paul C. Gannon, Citizen | |
| √ Robert C. Haarde, Citizen | |
| √ Karen Massey, Citizen | |
| √ Sabino (Sam) Merra, Citizen | |
| √ Lawrence W. O'Brien, Selectmen | |
| √ Paul E. Pakos, Citizen | |

“Committee in these meeting minutes refers to Sudbury Budget Task Force Committee”

Minutes:

Meeting was called to session at 7:35 p.m. All committee members present, with exception of those noted above as A (Absent). Guests for this meeting noted above. All participants introduced themselves.

Minutes from previous meeting 11/26 not yet available for review.

Topics and key discussion points of the meeting were as follows:

- 1) Community Preservation Act (CPA)
 - a. Explanation of CPA: dollars generated from Registry of Deeds fees available to communities for open space, recreation, historic preservation and affordable housing. Sudbury has adopted 3% surcharge on residential real estate tax bills (the max of the 1-3% allowed) because if town assesses full 3% we are eligible for 100% state matching funds. We have received 100% matching funds 5 years in a row.
 - b. Currently \$8million in bonds and \$6million cash on hand
 - c. Minimum distribution requirements:
 - i. 10% affordable housing
 - ii. 10% historic preservation
 - iii. 10% open space/recreation (must be for something new, not renovation)
 - d. Can use up to 5% for administration (ie consultants, housing specialists)

- e. Town expects decline in state match as follows: 100% 2007, 70% 2008, 55% 2009, unsure after that. New state legislation attempting to dedicate more funds into state CPA account.
 - f. CPA currently collects \$2.5 million per year via real estate tax bills
 - g. In response to a question: town meeting could repeal CPA at any point and likewise reinstate at any point – would require both a majority vote of town meeting and a ballot vote.
 - h. Discussion of open space and the positive economic impact to the town (education & public services not required)
- 2) Affordable Housing
- a. There are 4 new 40B developments in town: 75% of the units in each development are market rate, 25% are affordable.
 - b. Town expects 140 units in next 5-10 years, 25% of them affordable.
 - c. Town expects these units to attract smaller household size, providing positive financial benefits
 - d. Town stated following statistic: on average 1.8 children per house, .5 children per condo
- 3) Commercial Development
- a. Currently 250 55+ condos (considered by town to be comm'l development) in Sudbury, about ½ permitted & ½ built & occupied – expect positive impact on tax revenue within 5 years.
 - b. Significant current commercial properties in Sudbury: Bosse, Range Rover
 - c. Expected that Herb Chambers BMW will reside behind Sky Restaurant, expect \$250k/yr tax revenue
 - d. Biggest hurdle to commercial development in Sudbury – SEPTIC!
 - e. Town has been exploring options for sewer and wastewater treatment for last 40 years.
 - f. Sudbury is not part of MWRA
 - g. Marlborough has 2 treatment sites – East and West – there has been thought into connecting into Marlborough's system
 - h. Marlborough's costs were approximately \$10 million each, plus an add'l \$20 mill to upgrade each
 - i. New Wayland Town Centre project will include rehab to treatment plant and leaching field – old Polaroid facility had large capacity
 - j. Town estimates that 50 acres are needed for a town sewer site
 - k. Sudbury/Wayland Septage has its own budget and is responsible for its own billing & collections
 - i. Currently processes 25k gal/day. Would like to increase that to 35-40k gal/day – estimate \$2m to rehab/upgrade
- 4) Water District
- a. Established in 1930's & self-sustaining with own staff, benefits, payroll, and add'l revenue from a few cell towers
 - b. Own town meeting in May and a separate election from the town
- 5) Senior Property Tax Relief
- a. Property Tax Equity Committee – article 54
 - i. History – passed at town meeting, then failed on Beacon Hill. 2nd attempt failed at town meeting
 - b. Circuit breaker legislation: Sudbury could borrow from this and propose to the citizens: age requirement, income requirement, house value requirement – results in tax credit.
 - c. However, state resistant because creates a class for a state wide tax
 - d. Boston Council on Aging got the state to approve a more liberal deferral program
- 6) Meeting was adjourned at approx 9:45 pm.
- 7) Next Sudbury Review Task Force meeting, Monday, February 11, 7:30 EST Flynn Building, 2nd Floor.

Dufault, Tammie M

From: Marty Ragones [ragones@comcast.net]
Sent: Friday, December 07, 2007 12:26 PM
To: brtf@sudbury.ma.us
Cc: Zurka, Debbie; Verni, Ralph; Stewart, Sheila; Kneeland, Bill; Jacobson, James; Jacobson, Bob; Gossels, Jamie; Woodard, Chuck
Subject: 12/10 Reading list and other info
Attachments: BRTF Wayland Sudbury Septage 12-7-07.pdf; BRTF Agenda 12-10-07.doc

Hi--

The agenda for our mtg on Monday, 12/10 (Flynn Bldg, 7:30pm) is attached as is the Septage Disposal Agreement between Wayland-Sudbury. If you will remember, topics for discussion are: Community Preservation Act, Affordable Hsg, Commercial Development, Sudbury Wtr District, Senior Property Relief and the Wayland-Sudbury Septage. Larry O'Brien will lead the discussion, and Jody Kablack, Town Planner/ Dr of Planning and Community Development will also attend.

Larry's suggested reading list entails going to the town website (www.town.sudbury.ma.us) and accessing the following:

1. CPA - Committees, Community Preservation Committee
2. Affordable Hsg - Documents, Committees, Planning Bd, Master Plan, Housing Elements, pp 72-82
3. Commercial Development - Documents, Committees, Planning Bd, Master Plan, Economic Development Element, pp 33-42.
4. Senior Tax Relief - 1) Search, Archives: Documents, Property Tax Equity Review Committee Final Report, and 2) Search, Property Tax Deferral

Tammie will not be attending this mtg, so if anyone would be available to take minutes, it would be much appreciated.

Brainstorming

In order to move into our brainstorming phase, we agreed at our last mtg that each member would submit a list of his/her own ideas for revenue generation and/or expense reduction to be considered by the committee. These lists could be submitted in bullet format and will then all be compiled and distributed to the committee to digest before the first brainstorming mtg on 2/11/08. (Please do not write extensive narrative. You have the option of presenting your own ideas at our meetings, but we would like this compilation to be in an outline format.) This compilation will be the basis for our group brainstorming sessions. As a reminder, our mission statement clearly instructs us as a committee to develop up to five promising areas of revenue generation and expense reduction/avoidance that can be investigated further, based on their potential to produce significant fiscal impacts. Deadline for your individual list of ideas is Friday, 1/18/08 by email. Will let you know as time gets closer who will be receiving those emails. Marty