

CPC Reporting Requirement Policy

Adopted December 6, 2017

Accurate record keeping and reporting are crucial to the successful management of CPC funded activities. Maintaining adequate documentation of CPC funded projects is important for the Town to track performance and to provide adequate support and oversight of projects.

Recipients of CPC funds shall establish and maintain the following records and those records shall be available to CPC if requested. All records shall be accurate, complete and orderly.

1. Administrative records
 - a. Files and records that apply to the administration of CPC funded projects, including but not limited to:
 - i. General program files
 - ii. Legal files, including contracts
2. Financial records
 - a. Includes chart of account, journals and ledgers, invoices, procurement information, and other records
3. Project files
 - a. Documentation of activities undertaken with respect to the project.

Records shall include a full description of each activity funded with CPC funds, including amount spent.

The records shall document that the funds were spent in compliance with the Town Meeting vote and for the use approved by the Town meeting vote.

CPC shall receive from the recipient of the CPC Funds an Annual Report for each of their CPC funded projects or activities until the account has been spent down or the project deemed final. This report shall be submitted by October 15 of each year to the Director of Planning and Community Development. If the recipient of the CPA funds is a private entity, the Director of Planning and Community Development or designee shall interview the recipient to confirm the funds were received and spent according to the Town Meeting warrant article and complete the form on the recipient's behalf.

The Annual Report shall be submitted on the attached form.

Town of Sudbury
Community Preservation Committee
Annual Reporting Form

Name of Project including year of Town Meeting and Article Number:

Date of Report:

Date of Town Meeting Approval:

Project Proponent:

Recipient of CPC Funds:

Name of Person Completing Form:

Description of Project:

Total Project Budget through CPC:

Total Spent in FY \$

Total Spent in prior fiscal years:

Balance Remaining:

Is the project completed? Yes No

Description of status of the project:

Project results, including any changes since Town Meeting:

Description of other pertinent information: