

Town of Sudbury

Community Preservation Committee Plan

Adopted 10/30/2025



Please email comments or questions to cpc@sudbury.ma.us
Community Preservation Committee, c/o Planning and Community Development Department,
278 Old Sudbury Road, Sudbury, MA 01776

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I. Introduction

The Community Preservation Act, MGL Chapter 44B (the “CPA”) is statewide enabling legislation allowing cities and towns in the Commonwealth of Massachusetts to adopt a property tax surcharge with revenues from this surcharge (plus state matching funds) to be used for open space preservation, creation of community housing, preservation of historic buildings and landscapes, and creation of recreation opportunities. Sudbury adopted the CPA at the 2001 Annual Town Meeting and at a Town Election in March 2002. The surcharge went into effect with the start of Fiscal Year 2003 on July 1, 2002. Sudbury was one of the first communities in the Commonwealth to adopt the CPA.

The Community Preservation Committee (CPC) requires that all proposed projects be eligible for CPA funding according to the [requirements described in the legislation](#). Funds collected under the CPA can only be spent for four main community preservation purposes – open space, historic resources, community housing and recreation. In addition, at least 10% of the funds received in any fiscal year must be spent or set aside for each of the first three of those areas (open space, historic resources and community housing). The remaining 70% of each year’s funds can be spent in any of the four areas. In addition, up to 5% of the annual Community Preservation revenues can be spent on administrative and operating expenses of the CPC. (MGL c.44B, Section 6)

All Community Preservation Act funding requests require the recommendation of the project by the CPC to Town Meeting, and a majority vote of Town Meeting, except for bonded projects and land acquisitions, which require a two thirds majority vote of Town Meeting.

After its formation in 2002, the CPC determined that its role would be as facilitator for community preservation in Sudbury. The committee wrote the following guidelines for its conduct.

- It will be a catalyst for projects, not an initiator
- It will be a funder, not a developer
- It will utilize community goals previously set forth in other public documents that have received wide scrutiny and public input
- It will attempt to meet multiple community preservation goals in each project
- It will communicate its mission and goals to the general public

The Community Preservation Act has proven to be very popular and successful in Sudbury. Residents have now seen the successful completion of over 140 projects, including the preservation of hundreds of acres of open space.

Community Preservation Committee

Pursuant to the provisions of the Community Preservation Act (CPA), and our local by-law, Chapter 5, Article IV, Sudbury established a Community Preservation Committee (CPC) in 2002. The committee consists of 9 members, including a member designated from each of the following commissions or boards: Select Board, Conservation Commission, Historical Commission, Planning Board, Park and Recreation Commission, Finance Committee, and Housing Authority; and 2 members at large appointed by the Select Board.

The Duties of said Community Preservation Committee shall be to:

1. Study the needs, possibilities, and resources of the Town regarding community preservation. The Committee shall consult with existing municipal boards, including the Conservation Commission, the Sudbury Historical Commission, the Planning Board, the Park and Recreation Commission, the Sudbury Housing Authority, or persons acting in those capacities or performing like duties, in conducting such studies. As part of its study, the Committee shall hold one or more public informational hearings on the needs, possibilities, and resources of the Town regarding community preservation possibilities and resources, notice of which shall be posted publicly and published for each of two weeks preceding a hearing in a newspaper of general circulation in the town. (MGL c44B, Section 5(b)(1))
2. Make recommendations to the legislative body for the acquisition, creation and preservation of open space; for the acquisition, preservation, rehabilitation and restoration of historic resources; for the acquisition, creation, preservation, rehabilitation and restoration of land for recreational use; for the acquisition, creation, preservation and support of community housing; and for rehabilitation or restoration of open space and community housing that is acquired or created as provided in this section; provided, however, that funds expended pursuant to this chapter shall not be used for maintenance. With respect to community housing, the community preservation committee shall recommend, wherever possible, the reuse of existing buildings or construction of new buildings on previously developed sites. With respect to recreational use, the acquisition of artificial turf for athletic fields shall be prohibited. (MGL c. 44B, Section 5(b)(2))
3. Community Preservation Committee may include in its recommendation to the Town Meeting a recommendation to set aside for later spending funds for specific purposes that are consistent with community preservation but for which sufficient revenues are not then available in the Community Preservation Fund to accomplish that specific purpose or to set aside for later spending funds for general purposes that are consistent with community preservation. (MGL c.44B, Section 6)

Community Preservation Committee members as of October 22, 2025

Sherrill Cline, Chair, Housing Authority representative
Sam Markuse, Vice-Chair, Member-at-Large
Kirsten Roopenian, Planning Board representative
Daniel Carty, Select Board representative
Andrew Bettinelli, Finance Committee representative
Harry Hoffman, Conservation Commission representative
William Atkeson, Park and Recreation Commission representative
Jan Costa, Historical Commission representative
David Kaplan, Member-at-Large

II. Sudbury CPA Program: 2002-2025

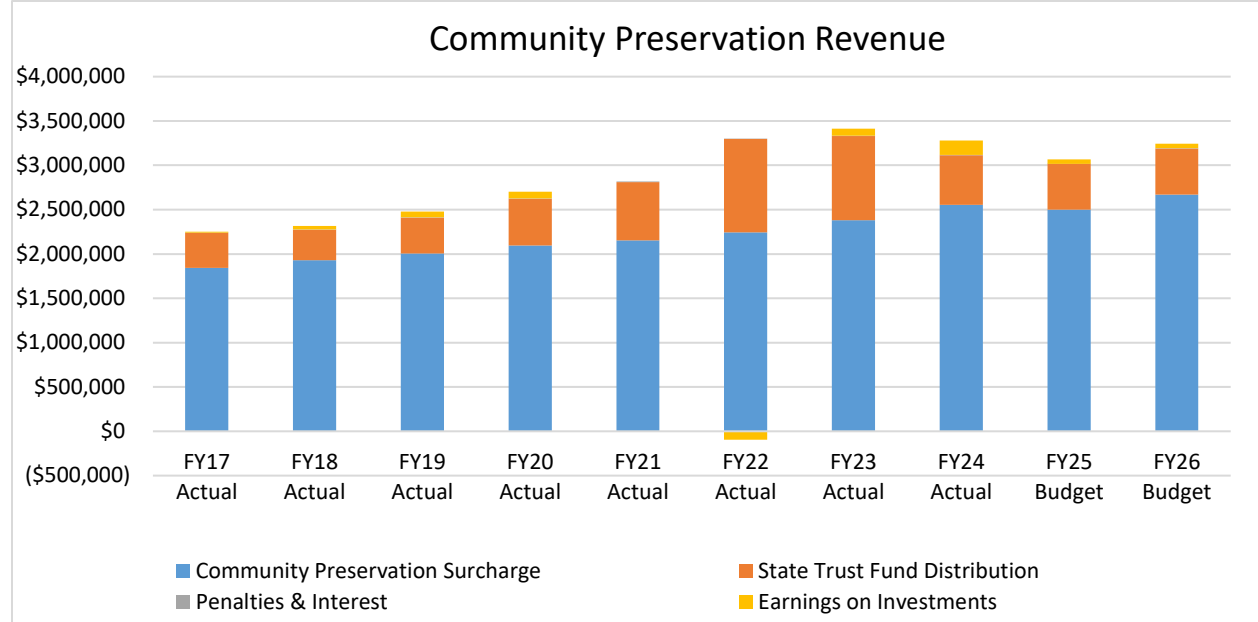
Revenue

The 3% surcharge went into effect in 2003 and through this surcharge, Sudbury has raised almost \$37 million through FY 24. In addition, Sudbury has received over \$15 million of state matching funds. Because Sudbury adopted the maximum 3% surcharge, the Town has received the maximum State match as shown in the table below. The CPA fund balance also earns interest income on its unspent funds. Therefore, the total revenue generated by the CPA in Sudbury since 2003 is almost \$55 million of funding dedicated to Parks and Recreation, Open Space, Historic Preservation and Community Housing.

Town of Sudbury Community Preservation Act Revenues					
Fiscal Year	3% CPA Tax Surcharge	State Match	State Match %	Total CPA Tax/Match	Interest Earned
2003	\$1,030,840			\$1,030,840	\$3,552
2004	\$1,090,772	\$1,030,840	100.00%	\$2,121,612	\$13,755
2005	\$1,105,972	\$1,090,772	100.00%	\$2,196,744	\$74,624
2006	\$1,248,806	\$1,105,972	100.00%	\$2,354,778	\$220,411
2007	\$1,307,615	\$1,248,806	100.00%	\$2,556,421	\$293,629
2008	\$1,355,513	\$1,307,615	100.00%	\$2,663,128	\$294,945
2009	\$1,436,011	\$965,898	71.26%	\$2,401,909	\$248,946
2010	\$1,471,025	\$539,676	37.58%	\$2,010,701	\$185,471
2011	\$1,502,906	\$431,234	29.32%	\$1,934,140	\$158,067
2012	\$1,534,878	\$431,743	28.73%	\$1,966,621	\$102,681
2013	\$1,587,599	\$443,953	28.91%	\$2,031,552	\$48,566
2014	\$1,646,001	\$895,751	56.42%	\$2,541,752	\$28,050
2015	\$1,668,843	\$559,382	34.00%	\$2,228,225	\$25,494
2016	\$1,761,704	\$534,729	32.10%	\$2,296,433	\$27,465
2017	\$1,844,796	\$391,958	22.25%	\$2,236,754	\$12,227
2018	\$1,929,918	\$342,975	18.60%	\$2,272,893	\$39,040
2019	\$2,005,977	\$403,176	20.89%	\$2,409,153	\$65,412
2020	\$2,096,860	\$525,058	26.17%	\$2,621,918	\$76,173
2021	\$2,154,274	\$657,465	31.35%	\$2,811,739	(\$1,236)
2022	\$2,243,896	\$1,055,262	48.98%	\$3,299,158	(\$95,554)
2023	\$2,381,306	\$948,629	42.28%	\$3,329,935	\$80,014
2024	\$2,553,631	\$558,308	23.45%	\$3,111,939	\$163,672
Total	\$36,959,143	\$15,469,202		\$52,428,345	\$2,065,404

* State matching funds are received in the following fiscal year.

The table below shows where Community Preservation revenue comes from.



Below is a present-day illustration of the CPA surcharge assessment. As shown in the table below, the 3% surcharge costs the average household in Sudbury \$449 a year. CPA is a low cost, high impact program that benefits every resident in some way.

Real Estate Taxes - Residential

Assessed Value	\$1,121,972
per /\$1,000	1,122
Rate Per \$1,000	\$14.64
Residential Annual Real Estate Tax	\$16,426

Community Preservation Tax

Assessed Value	\$1,121,972
Less \$100,000 exemption	(100,000)
Adjusted Assessed Value	\$1,021,972
per /\$1,000	1,022
Rate Per \$1,000	\$14.64
Adjusted Tax	\$14,962
Community Preservation x 3%	3.00%
Community Preservation Tax	\$449
Total Residential Real Estate Tax	\$16,875

Expenditures

It has been the CPC's practice to use the estimated annual revenue from the local surcharge, state matching funds, and interest, as determined by the Director of Finance, as the annual budget for projects for the following fiscal year. However, there is no requirement to do so. The CPC has banked the interest earning surplus revenue for unexpected opportunities, such as a large land purchase or other costly allocation. This practice is intended to maintain an undesignated fund balance adequate to respond quickly if needed. As of the end of FY25, the undesignated fund balance was \$8,668,417.20.

Appropriated funds for approved projects are disbursed on a reimbursement basis for non-Town departments and by bill payment for Town departments. Appropriated funds that are not spent when the project is complete are reverted to the Community Preservation Fund.

As of the close of FY25, the CPC has recommended and Town Meeting has approved projects in the Open Space and Recreation categories totaling \$36,021,586, the Historic Resources category totaling \$4,220,704, and the Community Housing category totaling \$7,491,900.

Projects

To date, Town Meeting has approved over 140 projects. The full detailed list of CPA funded projects can be found in the Community Preservation Coalition Databank by visiting:

<https://www.communitypreservation.org/databank/projectsdatabase> Information about ongoing projects can be found on the CPC website by looking at the Annual Reports filed by the applicants.

Some of the most notable CPA funded projects in Sudbury include:

Bruce Freeman Rail Trail (BFRT) – Widely praised for outdoor recreation, biking, and walkability
Historic Monuments and Cemeteries - Revolutionary War, Wadsworth and Town Cemeteries
Hosmer House – Historic structure and collection preservation
Dickson property – 2.4 acres of open space and historic preservation
Cutting Farm – 54 acres of open space and recreational playing fields
Libby Property – 24 acres of open space
Town Clock - Restoration and preservation
Nobscot Conservation – over 300 acres of open space
Broadacres Farm Acquisition – Beautiful open space and potential for recreational playing fields
Lincoln-Sudbury Athletic Complex – Popular among families and sports groups
Playground Modernization Projects –Especially appreciated by parents and school communities
Coolidge Sudbury – Positively recognized for increasing senior and affordable housing

III. Sudbury's Community Preservation Goals

Sudbury's community preservation goals are included in the goals and objectives noted in town wide studies including the 2021 Master Plan, 2009 to 2013 Open Space and Recreation Plan, the 2024 Facility Condition Assessment, Study, the 2025 Housing Production Plan, the 2025 Athletic Field Evaluation and Needs Assessment, the 2021 Historic Property Survey, Phase 4, and the 2022

Historic Preservation Plan, as well as new goals developed annually by the Select Board. It should be noted that the Community Preservation Committee encourages proponents to refer to these goals when making their applications for funding.

Pursuant to MGL c 44B, Section 5(b)(1), the Community Preservation Committee held a Public Forum on April 16, 2025. The public was invited to attend and suggest projects for future consideration. The following potential CPA project goals were identified:

- Continued work at the Fairbank Community Center including a Pavilion and a Sport Court
- Continued preservation and rehabilitation of the Hosmer House and its contents
- Rehabilitation of the Carding Mill
- Rehabilitation of the Section Tool House and the South Sudbury Train Station along the Mass Central Rail Trail
- Marking and preserving the historic railroad artifacts along the Bruce Freeman and Mass Central Rail Trails
- Restoration of Town Hall
- Further development of the Broadacres Farm property for community housing and recreation
- Completion of the BFRT south to Framingham
- Purchase of the vacant lot on Rt 20 adjacent to the southern extension of the BFRT for an amenity associated with the BFRT
- Identifying proposals in the recently completed Facilities Needs Assessment that would be eligible for CPA funding
- Hiring a consultant to study the boundaries of the current Historic Districts
- Pursuing a joint effort with Habitat for Humanities for the creation of community housing

These proposed projects, as well as the findings of the studies listed above, will be considered by the committee.

Open Space

Sudbury enjoys a variety of open spaces which are owned and/or maintained by the Sudbury Conservation Commission, the Federal Government (Great Meadows National Wildlife Refuge and Assabet River National Wildlife Refuge), the State Department of Transportation (Bruce Freeman Rail Trail) and Department of Conservation Resources (Mass Central Rail Trail) and Sudbury Valley Trustees. Sudbury also enjoys many privately owned parcels of land that add significantly to the “rural” character of the Town, some of which are not permanently protected from development.

Sudbury has benefited from the use of CPA funds to acquire or protect 567 acres of open space as listed below.



There were 42 parcels on the 2009 Open Space Plan that the Town had an interest in purchasing or preserving if and when the properties come on the market. Between 2009 and the date of this publication, the Town has successfully purchased 7 of the 42.

The seven parcels which have been acquired, either in fee or by conservation restriction are: the CSX corridor, Fairbank Farm, Broadacres Farm, Johnson Farm, Liberty Ledge (aka Camp Sewataro), and Pantry Brook Farm. The Mass Central Rail Trail has been developed into a rail trail by the state.

The Town still maintains an interest in the remaining open space parcels. To that end, the CPC is conservative in the use of funds to preserve the ability to purchase large parcels as they come on the market.

Recreation

The Town of Sudbury, through its Park and Recreation Department, maintains and manages the recreational facilities and programs established by the Town. In addition to the playgrounds on school properties, residents enjoy many of the town's recreational areas which include the Bruce Freeman Rail Trail, Mass Central Rail Trail, Broadacres Farm, Lincoln Meadows Community Garden, Cutting Field, Davis Recreation Area, Fairbank Community Center, Featherland Park, Frank Feeley Park/Field, Haskell Field Recreation Area, Heritage Park, and the Lincoln Sudbury Community Field. Of these, the Town has used CPA funds to purchase Cutting Field and Broadacres Farm and has made significant improvements at several of the other properties as follows:

- 2004-2014 – Create approximately 7 miles of walkways
- 2005 – Purchase and create the Cutting Athletic Field
- 2005 – Construct the dock at Willis Pond
- 2006 – Major improvements to the Lincoln Sudbury Community Athletic Fields
- 2013, 2015, 2016 – Restoration of historic town center landscaping
- 2017 & 2019 – Reconstruct the former Featherland Park tennis courts into four multi-sport courts

2018 & 2019 – Bring Noyes School playground into compliance with accessibility requirements
2019 – Bring Nixon School playground into compliance with accessibility requirements
2021 – Major improvements to the Adelson Playground in the Haskell Field Recreation Area
2021 – Major improvements to Feeley Field 1
2023 – Install Fence and Outdoor Lights for Multisport Courts at the Fairbank Community Center
2023 – Create Outdoor Health and Wellness Space at the Curtis Middle School

CPA funds have been appropriated for the following projects:

2024 – Development of a driveway to Parkinson Field
2024 – Install an artisan well at Lincoln Meadows Community Garden
2025 – Build a pavilion at the Fairbank Community Center and create a landscape design

Future Recreation Projects

In addition to the projects identified at the Public Forum, the following projects were identified by the Park and Recreation Commission:

- Recreational walkway plan
- Broadacres Farm

Historic Preservation

Reverence for the past is amply demonstrated in Sudbury in areas where the look and feel of a small New England town has been preserved. Residents treasure the open space, stone walls, and beautiful older homes that grace many of the Town's scenic roadways. Historic District boundary designations have been adopted to preserve and maintain older structures in several areas in town. An active Historical Commission, Historic Districts Commission and Historical Society work to enhance preservation efforts.

Some of the efforts include signage on homes stating the year built, roadside markers delineating historic district boundaries, completion of inventories of non-designated historic structures, creation of four historic districts, restoration of several historic Town structures, and completion of a preservation project for historic Town documents.

CPA funds have also contributed to the preservation of Sudbury's historic resources in the following ways.

2003-2025 – Multiple allocations for the Hosmer House and its contents.
2004-2014 – Historic town cemeteries restoration
2005-2023 – Town wide surveys of historic structures
2006 – Relocate and restore the historic Hearse House
2007 – Study of the Carding Mill House
2008 – Study of the Stearn's Mill Dam
2008 – Archeological Study of the Military Training Field
2010, 2012 & 2017 – Town Hall architectural and design study
2008-2019 – Multiple allocations for the preservation of Historic Town records

2022 – Town Clock restoration
2006, 2009, 2016 & 2019 – Loring Parsonage - The Sudbury History Center and Museum
2020 – Goodnow Library historic room rehabilitation
2022 – Rewrite of the Historic District design guidelines
2020 & 2024 – Wayside Inn site study and historic bridge construction

Community Housing

Planning for affordable housing in Sudbury takes place through the participation of a number of Town boards and departments, including the Regional Housing Services Office, Housing Trust, Housing Authority, and the Department of Planning and Community Development. The Housing Production Plan, undertaken every five years and submitted to the Massachusetts Executive Office of Housing and Livable Communities for approval, informs decisions made with regard to affordable housing. However, decisions are also made based on properties that become available, resources needed to create the housing, meeting community housing needs, and other factors. The CPA allows for acquisition, creation, preservation, and support of housing for low- and moderate-income people (“community housing”), The CPA also allows for rehabilitation or restoration of community housing that has been created or acquired with community preservation funds.

Sudbury uses the CPA funds to support the efforts of the Sudbury Housing Authority to expand its inventory of rental homes. The Sudbury Housing Authority has used CPA funds to preserve the exterior structure at Musketahquid Village (in 2008), to purchase a home, and to leverage over \$3 Million in state funds for the demolition of 4 single family homes and the construction of 5 two family homes on SHA owned land. Those homes were occupied in 2012.

In 2006, Sudbury adopted M.G.L. c. 44, s.55C to create the Sudbury Housing Trust with the mission to increase the number of affordable home ownership units. The SHT is funded by allocations from the CPA fund. The SHT has created 14 home ownership units; 8 units through the Home Preservation program, 2 Habitat for Humanity units, 3 Maynard Road units, and 1 buy-down on Old Country Road. The SHT also assisted in the creation of another 126 units at Coolidge in Sudbury.

State housing policy set a goal of 10% affordable housing for municipalities throughout the state. Sudbury currently exceeds the 10% requirement of the total housing stock certified as affordable. However, the real number of homes that are for low and income people is 478 or 7.33%. Sudbury, with its concentration of single-family housing and escalating land values, must stay vigilant to provide the kind of diversity necessary for a thriving community.

Future Community Housing Projects

The following parcels were identified in the 2025 Housing Production Plan as having the potential for development for affordable housing.

- Public Safety Complex west - 77 Hudson Road
- Frost Farm – Site of old home which has been removed
- Broadacres Farm – ~4-acre portion of land for municipal use north of Morse Road

- Liberty Ledge – Site of Camp Sewataro where there are several existing buildings which have the potential for renovation
- Other potential town owned parcels including those identified in the “Town Owned Property Review SHA 2017”

IV. The Process

Every year, the CPC invites the submission of applications for CPA funds. Town boards, committees and departments, civic organizations, and residents may bring proposals for funding to the CPC. The application form is found on the CPC website and in Appendix IV. The process is as follows:

- Interested parties submit project applications in the early fall
- CPC reviews each application for CPA eligibility
- CPC gathers information about the plan, process, cost, and proposed timeline of each application
- CPC interviews project applicants at an open meeting during which the public may question the applicants.
- CPC deliberates taking into account the merits of each application and the available funds
- CPC recommends a list of projects to Town Meeting for approval

The requirements for eligible CPA projects are stated in the statute as follows:

- acquisition, creation, and preservation of open space
- acquisition, preservation, rehabilitation, and restoration of historic resources
- acquisition, creation, preservation, and support of community housing
- acquisition, creation, preservation, and rehabilitation or restoration land for recreational use
- rehabilitation and/or restoration of open space and community housing that has been acquired with CPA funds.

The Community Preservation Act has a multi-step process to determine eligibility for funding in the Historic Resource category which is considered by the Sudbury Historical Commission before the application can be approved by the CPC.

The chart in Appendix VI summarizes the eligibility criteria for CPA funds.

While the CPC is empowered to make recommendations to Town Meeting, it does not have the authority to appropriate funds for particular projects. That power is reserved solely for Town Meeting. Town Meeting may choose to deny or reduce funding for a project recommended by the CPC, but it may not increase a recommended appropriation, nor may Town Meeting entertain a project for CPA funding unless recommended by the CPC.

The CPC maintains a Town-wide and long-term perspective. The Committee recommends projects that will have a significant, positive long-term impact on the Town. The CPC strives to provide Town Meeting with a strong and consistent rationale for its recommendations and to create an effective process through which departments, organizations and citizens may gain access to CPA funds for projects that enhance the Town.

In 2017, Sudbury's CPC instituted a reporting requirement which applies to all appropriations that were approved at Town Meeting more than one year ago. The proponents of the appropriation must advise the committee as to the status of the project and the project results. In this way, the CPC can monitor whether a project is complete, and, if there are unspent funds, they can be reverted.

The CPC generally meets twice a month from September through January to review the applications and prepare warrant articles by the end of January. All the meetings are open to the public. The proposals are then reviewed by the Capital Improvement Advisory Committee (if applicable), the Finance Committee and the Select Board. Proponents may be invited by these committees to make further presentations. Finally, the applications, now Warrant Articles, are voted on at Town Meeting.

V. Additional Sources of Information

The Community Preservation Coalition is an alliance of open space, affordable housing, and historic preservation organizations that works with municipalities to help them understand, adopt, and implement the CPA. Members of the Coalition include: the Citizens Housing and Planning Association (CHAPA); the Massachusetts Affordable Housing Alliance (MAHA); the Massachusetts Audubon Society; the National Trust for Historic Preservation; Preservation Massachusetts; the Trust for Public Land (TPL) and The Trustees of Reservations (TTOR). Their website is www.communitypreservation.org. This website is an excellent source of information about the permitted and prohibited uses of CPA funds, as well as a database of projects throughout the Commonwealth.

In addition to the legislation, the Department of Revenue (DOR) issues bulletins and Informational Guideline Releases (IGRs) covering a wide scope of information on the financial reporting aspects of the CPA. The original guidance on how to administer the CPA is IGR No. 00-209, dated December 2000. Occasional updates are issued and can be found on the DOR website at www.mass.gov/DOR.

APPENDIX

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I. The Community Preservation Act, M.G.L. c. 44B

The Community Preservation Act, M.G.L. c. 44B, (“CPA”) is a Massachusetts state law that allows cities and towns to create a fund to support improvements in Open Space & Outdoor Recreation, Community Housing, and Historic Preservation. The CPA enables communities to raise money through a surcharge on property taxes which is partially matched by the state. Two of the relevant sections are as follows:

Section 5. (a) A city or town that accepts sections 3 to 7, inclusive, shall establish by ordinance or by-law a community preservation committee. The committee shall consist of not less than five nor more than nine members. The ordinance or by-law shall determine the composition of the committee, the length of its term and the method of selecting its members, whether by election or appointment or by a combination thereof. The committee shall include, but not be limited to, one member of the conservation commission established under section 8C of chapter 40 as designated by the commission, one member of the historical commission established under section 8D of said chapter 40 as designated by the commission, one member of the planning board established under section 81A of chapter 41 as designated by the board, one member of the board of park commissioners established under section 2 of chapter 45 as designated by the board and one member of the housing authority established under section 3 of chapter 121B as designated by the authority, or persons, as determined by the ordinance or by-law, acting in the capacity of or performing like duties of the commissions, board or authority if they have not been established in the city or town. If there are no persons acting in the capacity of or performing like duties of any such commission, board or authority, the ordinance or by-law shall designate those persons.

(b)(1) The community preservation committee shall study the needs, possibilities and resources of the city or town regarding community preservation, including the consideration of regional projects for community preservation. The committee shall consult with existing municipal boards, including the conservation commission, the historical commission, the planning board, the board of park commissioners and the housing authority, or persons acting in those capacities or performing like duties, in conducting such studies. As part of its study, the committee shall hold one or more public informational hearings on the needs, possibilities and resources of the city or town regarding community preservation possibilities and resources, notice of which shall be posted publicly and published for each of two weeks preceding a hearing in a newspaper of general circulation in the city or town.

(2) The community preservation committee shall make recommendations to the legislative body for the acquisition, creation and preservation of open space; for the acquisition, preservation, rehabilitation and restoration of historic resources; for the acquisition, creation, preservation, rehabilitation and restoration of land for recreational use; for the acquisition, creation, preservation and support of community housing; and for the rehabilitation or restoration of open space and community housing that is acquired or created as provided in this section; provided, however, that funds expended pursuant to this chapter shall not be used for maintenance. With respect to community housing, the community preservation committee shall recommend, whenever possible, the reuse of existing buildings or construction of new buildings on previously developed sites. With respect to recreational use, the acquisition of artificial turf for athletic fields shall be prohibited; provided, however, that any project approved by a municipality for the acquisition of

artificial turf for athletic fields prior to July 1, 2012 shall be a permitted use of community preservation funding.

Section 6. In each fiscal year and upon the recommendation of the community preservation committee, the legislative body shall spend, or set aside for later spending, not less than 10 per cent of the annual revenues in the Community Preservation Fund for open space, not less than 10 per cent of the annual revenues for historic resources and not less than 10 per cent of the annual revenues for community housing. In each fiscal year, the legislative body shall make appropriations from the Community Preservation Fund as it deems necessary for the administrative and operating expenses of the community preservation committee and such appropriations shall not exceed 5 per cent of the annual revenues in the Community Preservation Fund. The legislative body may also make appropriations from the Community Preservation Fund as it deems necessary for costs associated with tax billing software and outside vendors necessary to integrate such software for the first year that a city or town implements the this chapter; provided, however, that the total of any administrative and operating expenses of the community preservation committee and the first year implementation expenses shall not exceed 5 per cent of the annual revenues in the Community Preservation Fund.

Funds that are set aside shall be held in the Community Preservation Fund and spent in that year or later years; provided, however, that funds set aside for a specific purpose shall be spent only for the specific purpose. Any funds set aside may be expended in any city or town. The community preservation funds shall not replace existing operating funds, only augment them.

II. Administrative Funds Policy

Section 6 of the Community Preservation Act allows the Community Preservation Committee to appropriate such funds from the Community Preservation Fund as it deems necessary for the administrative and operating expenses of the Committee. Such appropriations shall not exceed five percent (5%) of its annual revenues.

The CPC has used its administrative funds to perform studies, evaluations, tests and other preliminary work on projects likely to be approved by the CPC or to cover unanticipated but appropriate expenses of CPA projects that have been approved by Town Meeting. The Committee's remaining operating expenses are generally confined to partial salaries for Town staff that perform appropriate CPA-related services.

The Committee adopted the following Administrative Funds Policy in August 2007 to guide applications for CPA administrative funds.

1. The use of administrative funds must be deemed by majority vote of the Committee to be appropriate and necessary and to meet one or more of the following criteria:
 - a) the expense is attributable to the operations of the Committee or to the administration of CPA funds generally, or
 - b) the project as a whole meets the requirements and limitations of the CPA and the General and Specific Guidelines of the CPC Report.
2. Any application for the use of administrative funds must demonstrate in writing, and with specificity, that the request falls under one of these areas.
3. If the application meets either of the above criteria, then the Committee will consider whether:
 - a) time is a critical factor, or
 - b) there is a lack of other funding resources (this last reason cannot be the *sole* reason for the granting of administrative funds).
4. An application for the use of administrative funds must, at the least, address the following items as they prove germane to the type of request:
 - a) How exactly does the request relate to a planned project, and how does that project meet the relevant General and Specific Criteria found in the CPC Report?
 - b) What exactly are the time-sensitive attributes of the request, and why is it not possible or desirable to wait until the following Town Meeting?
 - c) If the request is for consultant funding, either for consultant hours or a complete study, what exactly do we seek to learn from the end product (RFP-level detail)?
 - d) What alternative funding sources were approached, when and through whom? Why was the request denied?
5. Approval of applications for Administrative Funds is in the sole discretion of the Committee which will consider the language of the Act, guidance from the Community Preservation Coalition, the above-stated Policy, and the availability of funds, including consideration of potential future projects and expenses.

Following are lists of Appropriate and Inappropriate funding areas. These are illustrative and are not intended to be exhaustive.

Areas Appropriate for the Use of Administrative Funds

- a) Any expenses that are related to the operations of the Committee or the administration of CPA funds generally, and are allowable under State guidelines.
- b) Any expenses that could be termed “investigative” in nature and are required on a timely basis for the advancement of a project that, using the Committee’s existing General and Category Specific Criteria, the Committee feels might well be recommended by it to Town Meeting. For the most part these would include professional studies, evaluations and tests (for example, appraisals and soil tests in the case of a land purchase).

Areas NOT Appropriate for the Use of Administrative Funds

- a) Any expenses that clearly fall under the category of “normal Town operations”, even if those expenses are incidental, irregular, intermittent or otherwise not regular expenses of the Town.
- b) Any expenses related to proposed projects that the Committee feels are not likely to be recommended by it to Town Meeting due to a failure to meet General and Category Specific Criteria.
- c) Any expenses in which expediting the time of performance, while perhaps desirable, is not necessary.
- d) Any expenses that would appear to the Committee, either because of their size, type or debatable merit, to be more appropriately under the purview of Town Meeting.

III. Annual Reporting 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.

IV. Solicitation of Project Proposals

The Community Preservation Committee welcomes project proposals that may contribute to community preservation in Sudbury. [Forms and guidelines for submission](#) have been developed and are available on the Town's web site.

Project Submission Form:

	Town of Sudbury Community Preservation Committee cpc@sudbury.ma.us	Flynn Building 278 Old Sudbury Road Sudbury, MA 01776 978-639-3387 Fax: 978-639-3314 www.sudbury.ma.us/cpc
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PROJECT SUBMISSION FORM																													
<u>Applicant:</u>	<u>Submission Date:</u>																												
<u>Group or Committee Affiliation (if any):</u>																													
<u>Applicant Address:</u> 	<u>Purpose (please select all that apply):</u>																												
<u>Applicant Email & Phone Number:</u> 	☐ Open Space & Recreation																												
	☐ Community Housing																												
	☐ Historic Resource																												
<u>Project Manager Email & Phone Number:</u>																													
<u>Project Name:</u>																													
<u>Project Description:</u> 																													
<u>Costs:</u>																													
<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th style="width: 10%;">Fiscal Year</th><th style="width: 20%;">Total Project Cost</th><th style="width: 20%;">CPC Funds Requested</th><th style="width: 50%;">Other Funding Sources (Amount and Source)</th></tr></thead><tbody><tr><td>2027</td><td> </td><td> </td><td> </td></tr><tr><td>2028</td><td> </td><td> </td><td> </td></tr><tr><td>2029</td><td> </td><td> </td><td> </td></tr><tr><td>2030</td><td> </td><td> </td><td> </td></tr><tr><td>2031</td><td> </td><td> </td><td> </td></tr><tr><td>Total</td><td> </td><td> </td><td> </td></tr></tbody></table>	Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (Amount and Source)	2027				2028				2029				2030				2031				Total				
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2027																													
2028																													
2029																													
2030																													
2031																													
Total																													
<u>How does this project meet the General Criteria and Category Specific Criteria for Community Preservation Committee projects (see attached)?</u> 																													
<u>Does this project fall within the jurisdiction or interest of other Town Boards, Committees, Commissions, or Departments? If so, please list the boards, committees, commissions, or departments, whether applications and/or presentations have been made, and what input or recommendations have been given.</u> 																													
<u>For Community Preservation Committee Use:</u>																													
<u>Form Received On:</u>	<u>Project Presented to CPC On:</u>																												
<u>Reviewed By:</u>	<u>Determination:</u>																												

IV. (a) Project Guidelines

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

Guidelines for Project Submission

1. Each project request must be submitted to the Community Preservation Committee using the Project Submission Form as a cover sheet. Applications should be submitted as an electronic PDF file.
2. Requests must include a statement of need and be documented with appropriate supporting information. The use of maps, visual aids, and other supplemental information is encouraged.
3. Obtain written proposals, estimates, quotes, and such other evidence to document project scope and cost.
4. If the request is part of a multi-year project, include the total project cost and allocations.
5. Describe the endorsement, support, or other recommendations, if any, by other Town Boards, Committees, Commissions, and Departments.
6. Provide examples of similar project proposals in other communities, if any, including examples of project scope, project cost, and status of completion.
7. For Applicants that have multiple project requests, please prioritize projects.
8. Requests must be received by **Sunday, September 21, 2025** to be considered for recommendation at the May 2026 Annual Town Meeting.
9. Applicants must be present at a Community Preservation Committee meeting to answer questions. [The Community Preservation Committee meeting schedule has been announced and is posted on the Town's website.](#)

Please keep in mind there are legal limitations on the use of Community Preservation Act funds. Additional information on the [Community Preservation Act](#) and the [Community Preservation Committee](#) can be found on the [Town's website](#).

Please check the [allowable uses chart](#) to determine project eligibility.

Please submit the Project Submission Form and accompanying documentation to:

Ryan Poteat, Community Preservation Coordinator
c/o Planning and Community Development Department
Flynn Building 278 Old Sudbury Road
Sudbury, MA 01776
PoteatR@sudbury.ma.us

IV. (b) Project Criteria

General Criteria

The Sudbury Community Preservation Committee will give preference to proposals that address as many of the following general criteria as possible:

- Are eligible for Community Preservation Act (CPA) funding according to the requirements described in the CPA legislation;
- Are consistent with the Town's Master Plan, Open Space and Recreation Plan, Land Use Priorities Committee Report, Town-wide Comprehensive Facility Study, Community Housing Plan, and other planning documents that have received wide scrutiny and input and have been adopted by the Town;
- Receive endorsement by other municipal boards, committees, commissions, or departments.
- Preserve the essential character of the town as described in the Master Plan;
- Save resources that would otherwise be threatened and/or serve a currently under-served population;
- Either serve more than one CPA purpose (especially in linking open space, recreation, and community housing) or demonstrate why serving multiple needs is not feasible;
- Demonstrate practicality, feasibility, urgency;
- Demonstrate that the project can be implemented expeditiously and within budget;
- Demonstrate that project alternatives, and alternative funding mechanisms, have been fully explored;
- Produce an advantageous cost/benefit value;
- Leverage additional public and/or private funds; and
- Preserve or utilize currently owned Town assets.

Category Specific Criteria

Open Space proposals that address as many of the following specific criteria as possible will receive preference:

- Permanently protect important wildlife habitat, including areas that:
 - are of local significance for biodiversity;
 - contain a variety of habitats, with a diversity of geologic features and types of vegetation;
 - contain a habitat type that is in danger of vanishing from Sudbury; or
 - preserve habitat for threatened or endangered species of plants or animals;
- Preserve Sudbury's rural and agricultural character;
- Provide opportunities for passive recreation and environmental education;
- Protect or enhance wildlife corridors, promote connectivity of habitat or prevent fragmentation of habitats;
- Provide connections with existing trails or potential trail linkages;
- Preserve scenic views;
- Border a scenic road;
- Protect drinking water quantity and quality;

- Provide flood control/storage;
- Preserve important surface water bodies, including wetlands, vernal pools or riparian zones; and
- Preserve a parcel identified in the Open Space and Recreation Plan.

Recreation proposals that address as many of the following criteria as possible will receive preference:

- Support multiple recreation uses;
- Serve a significant number of residents;
- Expand the range of recreational opportunities available to Sudbury residents of all ages;
- Jointly benefit Conservation Commission and Park and Recreation Commission initiatives by promoting passive recreation, such as hiking, biking, and cross-country skiing, on town owned property;
- Maximize the utility of land already owned by Sudbury (e.g. school property); and
- Promote the creative use of railway and other corridors to create safe and healthful non-motorized transportation opportunities.

Community Housing proposals that address as many of the following criteria as possible will receive preference:

- Contribute to the goal of 10% affordability;
- Conform to the Town's Housing Production Plan;
- Promote a socioeconomic environment that encourages a diversity of income;
- Provide housing that is harmonious in design and scale with the surrounding community;
- Intermingle affordable and market rate housing at levels that exceed state requirements for percentage of affordable units;
- Ensure long-term affordability;
- Promote use of existing buildings or construction on previously-developed or Town-owned sites;
- Convert market rate to affordable units; and
- Give priority to local residents, and Town employees.

Historic Resource proposals that address as many of the following criteria as possible will receive preference:

- Protect, preserve, enhance, restore, and/or rehabilitate historic, cultural, architectural, or archaeological resources of significance, especially those that are threatened; and in the case of proposals on private property, the proposal and/or proponent meet certain economic criteria as may be required by the Community Preservation Committee;
- Protect, preserve, enhance, restore and/or rehabilitate Town-owned properties, features or resources of historical significance;
- Protect, preserve, enhance, restore, and/or rehabilitate the historical function of a property or site;
- Project is within a Sudbury Historic District, on a State or National Historic Register, or eligible for placement on such registers, or on the Sudbury Historic

Properties Survey;

- Project demonstrates a public benefit; and
- Project demonstrates the ability to provide permanent protection for maintaining the historic resource; and in the case of proposals on private property, the proposal and/or proponent have demonstrated additional protective measures and have met additional criteria, as may be imposed by the Community Preservation Committee, to ensure the continued permanent protection of the historic resource.

V. Sudbury's Current CPA Debt Obligations

Sudbury's current debt service amortization for all CPA projects is as follows:

Fiscal Year	Community Preservation		Total
	Principal	Interest	
FY2025	\$650,000	\$100,193	\$750,193
FY2026	550,000	78,943	\$628,943
FY2027	540,000	63,143	\$603,143
FY2028	540,000	50,043	\$590,043
FY2029	540,000	36,655	\$576,655
FY2030	310,000	25,568	\$335,568
FY2031	315,000	19,718	\$334,718
FY2032	230,000	13,768	\$243,768
FY2033	230,000	9,073	\$239,073
FY2034	235,000	4,651	\$239,651
FY2035	50,000	1,563	\$51,563
Total	\$4,190,000	\$403,314	\$4,593,314

Sudbury's current bond maturity for specific CPA projects is as follows:

Project	Principal Outstanding	Interest Outstanding	Debt Type	Bond Matures
Libby	\$115,000	\$2,300	CPA	2025
Johnson Farm	\$550,000	\$101,313	CPA	2035
Nobscot Conservation	\$1,195,000	\$71,238	CPA	2029
Pantry Brook	\$1,700,000	\$162,364	CPA	2034
Nobscot Refunding	\$630,000	\$66,100	CPA	2031

Total Debt Projects	\$4,190,000	\$403,314
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VI. Chart of Allowable Spending Purposes from the Community Preservation Coalition

	Open Space	Historic	Recreation	Housing
Acquire	Yes	Yes	Yes	Yes
Create	Yes	No	Yes	Yes
Preserve	Yes	Yes	Yes	Yes
Support	No	No	No	Yes
Rehabilitate and/or Restore	No (unless acquired or created with CPA \$\$)	Yes	Yes	No (unless acquired or created with CPA \$\$)