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 May 2022 ATM, Article 49

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

Date of Report: 5 November 2026

Date of Town Meeting Approval: May 2022

Project Proponent: Historic Districts Commission

Recipient of CPC Funds: Historic Districts Commission

Name of Person Completing Form: Adam Burney

Description of Project:

The May Annual Town Meeting voted to approve the appropriation a sum of money not to exceed $50,000 from the Historic Resources category of Community Preservation Act Funds, funded from Historic Resources Reserves, for the purpose of contracting for the creating of comprehensive and professionally-developed Design Guidelines for the Local Historic Districts including incidental and related expenses associated therewith; or act on anything relative thereto.

Total Project Budget through CPC: $50,000

Total Spent in FY26 $12780

Total Spent in prior fiscal years:

Balance Remaining: $37220

Is the project completed? Yes ☐ No ☑

Description of status of the project:

Through the fall of 2025 and into winter 2026 Heritage Strategies has begun working with the HDC to begin work on the Design Guidelines. Special HDC meetings were held on 11/13/25 and 2/24/26 for the HDC to meet with Heritage Strategies - these meetings are available on Sudbury TV. Additionally, Heritage Strategies regularly attends monthly HDC meetings to discuss project updates and next steps. Heritage Strategies has also compiled approximately 20 sample guidelines from other towns for the HDC to review and additional meetings are scheduled for spring 2026. The HDC's original timeline included a goal to have a final design guidelines ready for approval by the HDC by the end of 2026.

Project results, including any changes since Town Meeting:

The HDC is in receipt of draft Sections for a majority of the Guideline and is working on detailed review of such.

Description of other pertinent information: