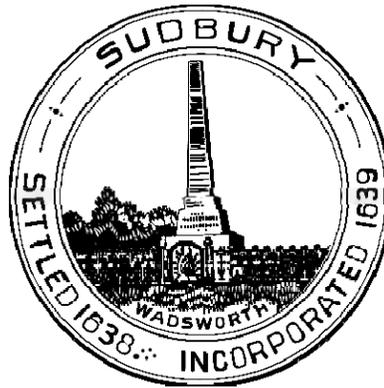


# Town of Sudbury Massachusetts



## OFFICIAL WARRANT

**ANNUAL TOWN MEETING**

**MONDAY, MAY 6, 2024, 7:30 p.m.**

CONTINUATION DATES, IF NEEDED

**TUESDAY, MAY 7, 2024 – 7:30 p.m.**

**WEDNESDAY, MAY 8, 2024 – 7:30 p.m.**

**MONDAY, MAY 13, 2024 – 7:30 p.m.**

Lincoln-Sudbury Regional High School  
390 Lincoln Road, Sudbury, MA

**BRING THIS BOOK WITH YOU**



**ADDITIONAL ARTICLE INFORMATION**

To learn more about the articles in the Town Meeting  
Warrant, please visit

**<https://sudbury.ma.us/townmeeting/2024atm>**

**TOWN OF SUDBURY  
2024 ANNUAL TOWN MEETING WARRANT**

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## ACCESS TO LINCOLN-SUDBURY REGIONAL HIGH SCHOOL AND PROVISIONS FOR PARTICULAR ACCOMMODATIONS

Note: Please check the Town of Sudbury website for changes or additional information.

The Select Board wishes to accommodate the attendance and participation of persons with disabilities at Town Meeting. As such, we urge those who may require particular accommodations to read the following carefully.

**Parking:** “HP” parking spaces are provided at two different locations: 1) the main entrance at the upper level (which will require using an elevator to the lower level to check in and to access the auditorium) and 2) the main parking lot to the right (east) of the school. From this location, you may also be dropped off at the entry walkway – a clear path to the entrance doors, leading directly to the check-in tables and the auditorium. Police on duty will provide assistance as needed, or requested.

**Auditorium Balcony:** The balcony can only be accessed from the Main Level. From the lower level of the building, you may use either the stairs or the elevator to gain entrance to the balcony – the upper level of the auditorium. The Moderator has ruled that if there is adequate seating on the main floor, the balcony **will not** be opened.

**Persons with Ambulatory Disabilities:** Spaces for persons who use wheelchairs will be available at the front and at the rear of the auditorium. For those who use assistive devices to ambulate, seating will be reserved at the rear of the hall and may be used if desired.

**Persons who are Blind or have Vision Impairments:** Reserved seating will be available at the front of the auditorium for persons with vision impairments who prefer to be close to the overhead projector. Large print materials will be made available where possible. We encourage those making prepared, formal presentations to have copies of viewgraphs, especially motions, available in large print.

**Persons who are Deaf or have Hearing Impairments:** Closed captioning will be available.

**Restrooms:** Restrooms are located across the hall from the auditorium.

## ADDITIONAL ACCESS INFORMATION 2024

### WHEELCHAIR-ACCESSIBLE TRANSPORTATION

The Sudbury Connection van service, through the Sudbury Senior Center and MetroWest Regional Transit Authority (MWRTA), will provide free accessible transportation to and from the meetings. If you are a registered rider, please reserve a ride to Sudbury Town Meeting by Thursday, May 2 by 4:00 PM by calling 508-820-4650. If you are not registered as a rider, please contact the Sudbury Senior Center to register at 978-443-3055 to complete an application by Wednesday, May 1 at 4:00 PM.

### HEARING & SIGHT IMPAIRMENTS

Those with hearing and vision impairments are encouraged to sit in designated areas by the front of the stage. **Closed Captioning** screens will be available. Those who wish to use their phone or device to view the captions may do so at <https://sudbury.ma.us/townmeeting/captions>.

Assisted Listening services are available through the **Audio Fetch** app, available on iOS and Android devices. A QR code to direct you to where to download the app will be available at Town Meeting or you can download the app in advance via the links below:

- Apple Store: <https://apps.apple.com/us/app/audiodfetch/id955015484>
- Google Play: <https://play.google.com/store/apps/details?id=com.waio.mobile.android>

Please bring your own headphones to use Fetch on your device.

If you do not own a smart phone or tablet and/or headphones, please contact the Sudbury Senior Center at 978-443-3055 or [senior@sudbury.ma.us](mailto:senior@sudbury.ma.us) as soon as possible, and at the latest by Tuesday, April 30 at 4:00 PM so that an accommodation may be arranged.

### MOBILITY AID, MEDICAL DEVICE, WHEELCHAIR AND OTHER ACCESSIBILITY ASSISTANCE

Seating for persons using a wheelchair is located in both the right and left rear sections of the main auditorium. Persons who use oxygen or mobility aids may also find it useful to sit near the back for ease of access and to exit.

### TOWN MEETING ELECTRONIC VOTING DEVICES (CLICKERS)

Electronic Voting Devices (“clickers”) will be used at the 2024 Sudbury Annual Town Meeting. Clickers with braille are available by request. If you wish to use a **Braille Voting Device**, please request one from the Election Official when you sign in to vote.

Persons requiring an accommodation in order to attend Town Meeting are urged to contact the Sudbury Senior Center at **978-443-3055** or [senior@sudbury.ma.us](mailto:senior@sudbury.ma.us) as soon as possible and at the latest by Tuesday, April 30 at 4:00 PM.

# ELECTRONIC VOTING AT TOWN MEETING

## HOW TO VOTE

- The Moderator will declare Open Vote and the Close of Vote
- To respond, press the button that matches your answer:

**1A = YES**

**2B = NO**

- Vote will be submitted automatically
- Only the last vote counts
- No need to press "Send"

## WHEN IS THE VOTE COUNTED?

- Only respond when the vote is open
- You may correct your previous votes  
**ONLY YOUR LAST VOTE WILL BE COUNTED**
- Recorded results will appear on large overhead screen

**Don't forget to turn in your voting devices to clerk staff before leaving.  
THEY DO NOT WORK OUTSIDE OF THE AUDITORIUM.**



**SUMMARY OF BASIC TOWN MEETING PROCEDURES**  
**General Rules of Debate and Voting**

1. Only registered voters, non-resident appointed or elected representatives of the Town, and Town employees may speak without consent of Town Meeting. The Moderator will not vote, even in the case of where the Moderator's vote would break or create a tie.
2. The proponents of an article make the first motion under the article. A voter must then second the motion. The proponents then make a presentation in support of the motion. The Moderator then recognizes the Select Board and Finance Committee for reports, followed by any other boards that are required to report on the article. After the Town boards have spoken, Town Meeting proceeds to general debate on the matter and a vote.
3. Please raise your hand when you wish to speak. After being recognized by the Moderator, please wait for a microphone to be passed to you at your seat. The record of Town Meeting is made on audiotape and your remarks will not be recorded if you do not speak into a microphone. Each and every time you speak, please stand (if you are able) and begin by giving your name and address for the record.
4. Until everyone who wishes to be heard has spoken, no one may speak more than twice on a matter except to correct an error or answer a question. The initial presentation by the proponent(s) of an article is limited to ten minutes, and all other comments are limited to five minutes, unless a majority of those present and voting give consent.
5. All votes are by majority unless otherwise announced. If the count is taken using electronic voting technology, the Moderator shall declare the vote, and provide an opportunity for any voter to notify the Town Moderator that they believe their vote was recorded in error; if so, the Moderator shall direct that the record be corrected by the Town Clerk. If seven or more voters doubt the vote, the Town Moderator may request another vote using the handheld technology, or otherwise set the manner of voting.
6. If Town Meeting approves a motion for reconsideration, the motion at issue immediately prior to the vote will be back before the voters, and the electronic voting system shall be used to record and tabulate the votes taken on the main motion.
7. If such electronic voting equipment is unavailable, the Town Moderator shall notify the Town Meeting as to what manner of voting will be used, and, unless 20 people stand in opposition, such method shall be implemented. If 20 voters do stand, then the Moderator's recommendation is pending before the meeting, subject to amendment like any other motion. If the Moderator is unable to decide the vote or if the declaration by the Moderator is immediately questioned by 10 or more voters rising in their places, the Moderator shall then direct that a count be taken, whether by counting raised hands, raised placards or other indicia of vote, or by secret ballot or otherwise, as determined by the Moderator in the Moderator's sole discretion.
8. In the event of a non-electronic vote, votes will first be taken by a show of hands while voters are

seated. If the Moderator is in doubt, then a standing vote will be taken. If the Moderator is still in doubt, then tellers will count the votes. If a voter disagrees with the Moderator's call of a sitting or standing vote, the voter may challenge the call by immediately standing and saying loudly, "I challenge the vote!" If six additional voters support the challenge, the vote will be counted.

### **Motions and Amendments**

1. The purpose of an article in the Warrant is to inform the voters of what may come before the meeting and the outside scope of what may be considered. Every matter that is voted on at Town Meeting must come in the form of a motion. It is a motion that puts an article before Town Meeting, and it is the motion, *not the article*, that is actually voted on. Therefore, while speakers may refer to passing, defeating, or otherwise dealing with "the article," what Town Meeting actually debates and votes on are motions, not articles.
2. A speaker may question whether a certain motion is "within the four corners of the article." Such a challenge requires the Moderator to determine whether the motion is within a reasonable reading of the article as printed in the Warrant, and therefore should be allowed, or ruled out of order as being beyond the legitimate subject matter of the article.
3. Often, the first or "main" motion under an article will be to "move in the words of the article." By making this motion, the speaker is adopting the article as his or her motion thereunder. This can only be done if the language of the article is drafted in such a way that it is appropriate for simple adoption as a motion. Whenever the presenter's motion differs from the wording in the Warrant, the presenter must point out and explain those differences to Town Meeting.
4. All substantive motions, including all main motions and motions to amend a main motion, must be provided to the Moderator, the Town Clerk, and the Technology Administrator in writing before they are made. Please see the guidelines for electronic presentation on the Town website: [www.sudbury.ma.us](http://www.sudbury.ma.us).
5. If you have an amendment, you should e-mail it to the Technology Administrator at [infosystems@sudbury.ma.us](mailto:infosystems@sudbury.ma.us), with a copy to the Moderator at [moderator@sudbury.ma.us](mailto:moderator@sudbury.ma.us), and the Town Clerk at [clerk@sudbury.ma.us](mailto:clerk@sudbury.ma.us). Advance notice to the Technology Administrator, Moderator and Clerk enhances time efficiency at Town Meeting, and the Moderator may be able to suggest language that is both acceptable to you and within the four corners of the article and therefore permissible to proceed to debate and vote. It is also recommended that you discuss your amendment with the presenter of the article as you may be able to convince him or her to include it as part of the main motion and thus avoid having to vote separately on the amendment. The Moderator may reject proposed amendments that fail to adhere to these guidelines.

### **Dismissing Articles, Indefinite Postponement and Withdrawing Motions**

1. It is possible for Town Meeting to decide to take no action on an article. This decision is usually made because new or additional information has come to light after the preparation of the warrant indicating that action on the article is unnecessary, unwise or illegal. In such instances, frequently there will be a motion "to indefinitely postpone" an article. This motion, if adopted, kills the article for all intents and purposes for the Town Meeting. The motion is frequently used when proponents of an article have

decided not to proceed with it but want an opportunity to explain to the meeting why they are, in effect, abandoning the article at this time. The motion also may be used by someone who wishes to defeat an article before it can be fully debated on the merits. In such cases, it is important to understand that indefinite postponement can have the same effect as defeat which, in turn, can have significance with respect to some items, notably zoning matters, as to when the matter can again be considered by the Town.

2. If you have made a motion or an amendment, you can move to “withdraw the motion” if you have second thoughts or new information. A motion to withdraw can be made any time during the debate of the motion but cannot be made after the motion has been voted on.

### **Limits on Debate**

1. There is no prescribed limit to debate except common sense. The Moderator can limit debate and can ask speakers to stop if they are straying from the subject, repeating points already made or talking at unnecessary length.
2. Town Meeting itself can also terminate debate. To do so, after being recognized by the Moderator, you may say, “I move the previous question.” This motion is not debatable, and if seconded and voted by a two-thirds majority, debate ends and the motion under discussion will be then put to a vote.
3. The Moderator may defer motions to limit debate when, in his or her reasonable judgment, there are a significant number of voters who have indicated a desire to speak but have not yet been recognized.

### **Points of Order**

1. Once recognized by the Moderator, no speaker may be interrupted in any way except by a “point of order.” A point of order is not a motion, and does not require a second or a vote. It is a question, and on a point of order a voter may raise only three valid concerns:
  - a. Is the speaker entitled to the floor? For example, is the person a non-voter, or spoken for longer than his/her allotted time?
  - b. Is the speaker saying something inappropriate, frivolous, irrelevant, or illegal?
  - c. Is there some error in the procedure of the pending action or motion?
2. The Moderator welcomes proper points of order and will make every effort to explain the procedural issues that shape Town Meeting discussions. When exercising this parliamentary privilege, you should stand and state loudly that you wish to make a point of order, and wait for the Moderator to recognize you. No voter should hesitate to rise and bring to the Moderator’s attention an issue that constitutes a proper point of order because, when exercised responsibly, it functions as a tactful hint from a voter regarding important points of procedure that the Moderator may have missed.

## **Motions for Reconsideration**

1. Article II, Section 13 of our Bylaw controls. A motion to reconsider an article previously voted on in the same session (i.e. the same night), is proper, and an affirmative vote of 2/3 of the voters present is required for passage. If Town Meeting has adjourned for the evening, a motion to reconsider an article voted on in a previous session requires a unanimous vote, unless written notice of an intention to move for reconsideration, signed by 15 voters, is given to the Town Clerk by noon of the next weekday, in which case, a 2/3 vote would be required to pass a motion to reconsider.
2. In the event a motion to reconsider is properly made and seconded, all discussion must be confined exclusively to the merits or demerits of reconsideration. In general, the only proper reasons to seek reconsideration are that there occurred such a misstatement of fact or law in the preceding debate, or such an error of procedure, that the voters, if aware of such discrepancies, would have voted differently. It is not a proper basis for reconsideration to argue simply that the voters arrived at the wrong result.

## **The Budget**

1. A motion is first made by the Finance Committee proposing a budget that is limited to the amount required to finance the Finance Committee's budget proposal. This limiting motion only seeks a declaration from Town Meeting as to the overall limit on the budget. A vote in favor of the motion does not mean that Town Meeting has voted for the particular distribution of the total amount as set forth in the Warrant.
2. After voting on the limiting motion, Town Meeting will address the budget as follows:
  1. The Moderator will read the budgets in numerical order by title. For example, the Moderator will say "200 Public Safety, does anyone have a motion to amend or a question involving 200 Public Safety?" If you have a motion to amend or a question, please raise your hand.
  2. If you have a motion to amend, it should be in one of two forms:
    - a. For example, "I move to increase 200 Public Safety to the sum of \$X and to reduce 600 Culture and Recreation to the sum of \$Y." X cannot be greater than Y.
    - b. For example, "I move to reduce 200 Public Safety to the sum of \$Z."

A motion simply to increase a line item, without a corresponding reduction in another line item, will not be accepted because the preceding vote on the limiting motion will have capped the total amount of allowable appropriation.
  3. Town Meeting will debate and vote on any motion to amend.
  4. Town Meeting will arrive at the end of this process with a main motion on the budget as it may be amended, and then vote on it.

## **Consent Calendar**

1. In order to expedite Town Meeting and save valuable time for discussion of key issues, Sudbury utilizes a "Consent Calendar" to speed passage of articles that appear to raise no controversy. The purpose of the Consent Calendar is to allow the motions under these articles to be acted on as one unit and to be passed

by a vote without debate. The Consent Calendar will be taken up as the first order of business at the beginning of Town Meeting.

2. The Moderator will read the title of each article on the Consent Calendar in order to give voters the opportunity to remove it from the Consent Calendar. A total of seven (7) voters must request removal from the Consent Calendar. In the event an article is removed from the Consent Calendar, it will be voted upon when it is taken up in the usual course.
3. After calling out each individual article in the Consent Calendar, the Moderator will ask that all articles not removed from the Consent Calendar be passed as a unit. The quantum of vote required to pass the Consent Calendar will be the strictest quantum of vote required for any individual article on it.
4. Please review the list of articles and motions proposed for the Consent Calendar that follow. Complete reports are to be found under each article printed in this Warrant. If you have questions about the articles, motions or procedure, please feel free to call the Town Manager at 978-639-3381 before Town Meeting.

### **CONSENT CALENDAR ARTICLES AND MOTIONS**

**ARTICLE 5. FY25 TRANSFER STATION ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$312,318 for the Transfer Station Enterprise Fund for FY25, and further to authorize use of an additional \$17,551 for indirect costs; such sums to be raised from \$329,869 in FY25 receipts of the Enterprise, as set forth in the article. (See article at page 3.)

**ARTICLE 6. POOL ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$492,783 for the Pool Enterprise Fund for FY25, and further to authorize use of an additional \$45,000 for indirect costs; said sums to be raised from \$407,783 in FY25 receipts of the Enterprise and \$130,000 from Enterprise Fund retained earnings, as set forth in the article. (See article at page 4.)

**ARTICLE 7. RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET:** Move to appropriate the sum of \$215,663 for the Recreation Field Maintenance Enterprise Fund for FY25, and further to authorize use of an additional \$28,000 for indirect costs; said sums to be raised from \$243,663 in FY25 receipts of the Enterprise, as set forth in the article. (See article at page 5.)

**ARTICLE 8. SNOW AND ICE TRANSFER:** Move to indefinitely postpone. (See article at page 5.)

**ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING:** Move in the words of the article.  
(See article at page 6.)

**ARTICLE 11. FY25 STABILIZATION FUND:** Move in the words of the article with the sum of \$201,507 to be transferred from Free Cash. (See article at page 6.)

**ARTICLE 12. FY25 REVOLVING FUND SPENDING LIMITS:** Move in the words of the article.  
(See article at page 7.)

**ARTICLE 13. CAPITAL STABILIZATION FUND:** Move in the words of the article with the sum of \$250,000 to be transferred from Free Cash. (See article at page 8.)

**ARTICLE 15. MEANS TESTED SENIOR TAX EXEMPTION EXTENSION:** Move in the words of the article. (See article at page 9.)

**ARTICLE 18. SWAP BODY TRUCKS W/PLOW & VARIOUS BODIES:** Move in the words of the article with the sum of \$560,000 to be transferred from Free Cash. (See article at page 16.)

**ARTICLE 19. PICKUP TRUCK WITH PLOW:** Move in the words of the article with the sum of \$120,000 to be transferred from Free Cash. (See article at page 16.)

**ARTICLE 21. DPW ROOF TOP HVAC UNIT REPLACEMENTS** Move in the words of the article with the sum of \$200,000 to be raised by taxation. (See article at page 17.)

**ARTICLE 22. DPW SALT SED VINYL COVER REPLACEMENT** Move in the words of the article with the sum of \$125,000 to be raised by taxation. (See article at page 17.)

**ARTICLE 24. SPS SCHOOL CLASSROOM INSTRUCTIONAL EQUIPMENT REPLACEMENT:** Move in the words of the article with the sum of \$100,000 to be transferred from Free Cash. (See article at page 18.)

**ARTICLE 25. SPS HAYNES ELEMENTARY SCHOOL DEHUMIDIFICATION HVAC;** Move in the words of the article with the sum of \$150,000 to be transferred from Free Cash. (See article at page 19.)

**ARTICLE 26. LINCOLN-SUDBURY REGIONAL HIGH SCHOOL LIGHTING CONTROL REPLACEMENT:** Move in the words of the article with the sum of \$144,585 to be transferred from Free Cash. (See article at page 19.)

**ARTICLE 27. LINCOLN-SUDBURY REGIONAL HIGH SCHOOL EXTERIOR STAIRWELL REPLACEMENT:** Move in the words of the article with the sum of \$130,975 to be transferred from Free Cash. (See article at page 20.)

**ARTICLE 35. COMMUNITY PRESERVATION ACT FUND – WAYSIDE INN ROAD CONSTRUCTION:** Move to appropriate \$400,000 as set forth in the words of the article. (See article at page 28.)

**ARTICLE 36. COMMUNITY PRESERVATION ACT FUND – BRUCE FREEMAN RAIL TRAIL – PHASE 3:** Move to appropriate \$600,000 as set forth in the words of the article. (See article at page 29.)

**ARTICLE 37. COMMUNITY PRESERVATION ACT FUND – HOUSING AUTHORITY ALLOCATION:** Move to appropriate \$450,000 as set forth in the words of the article. (See article at page 29.)

**ARTICLE 38. COMMUNITY PRESERVATION ACT FUND – HOUSING TRUST ALLOCATION:** Move to appropriate \$380,000 as set forth in the words of the article. (See article at page 30.)

**ARTICLE 39. COMMUNITY PRESERVATION ACT FUND – REMEDIATION OF WATER CHESTNUTS FROM HOP BROOK POND SYSTEM:** Move to appropriate \$56,221 as set forth in the words of the article. (See article at page 31.)

**ARTICLE 40. COMMUNITY PRESERVATION ACT FUND – PARKINSON FIELD**

**DRIVEWAY DESIGN:** Move to appropriate \$100,000 as set forth in the words of the article.

(See article at page 32.)

**ARTICLE 41. COMMUNITY PRESERVATION ACT FUND – COMMUNITY GARDEN**

Move to appropriate \$40,000 as set forth in the words of the article. (See article at page 33.)

**ARTICLE 42. COMMUNITY PRESERVATION ACT FUND – REGIONAL HOUSING SERVICES**

**OFFICE (RHOS) MEMBERSHIP FEE** Move to appropriate \$33,000 as set forth in the words of the article.

(See article at page 33.)

**ARTICLE 43. COMMUNITY PRESERVATION ACT FUND – RETURN OF UNSPENT FUNDS**

Move in the words of the article. (See article at page 34.)

**ARTICLE 44. COMMUNITY PRESERVATION ACT FUND – GENERAL BUDGET AND**

**APPROPRIATIONS:** Move to appropriate the sums recommended by the CPC in the following

Community Preservation Act budget for FY25 Community Preservation surtaxes.

\$ 114,500 Administrative and Operating Cost

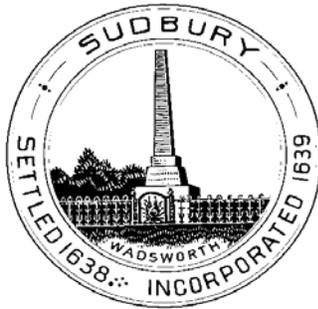
\$ 750,193 Debt Service

(See article at page 35.)

We gather at Town Meeting as friends and neighbors, united by a shared commitment to the civic life and governance of Sudbury. The town meeting form of government is unique to New England, and its continued existence links us directly to the founding of Sudbury more than 375 years ago. It is democracy in its finest and purest form, and its value lies in townspeople having discussions and making decisions together, face to face, in real time. Its proper functioning requires that every speaker be treated with courtesy and respect, no matter how strongly one may disagree with his or her point of view. To that end, the Moderator will not allow any clapping, hissing, booing or other audible noise, for or against any speakers, either before, during or after presentations. The Moderator has the power to terminate the right to speak of anyone who makes disrespectful comments, whether directed at a voter, speaker or Town official.

**PART I**

**TOWN OF SUDBURY ANNUAL  
TOWN MEETING WARRANT**



Commonwealth of Massachusetts Middlesex, ss.

To the Constable of the Town of Sudbury:

GREETINGS:

In the name of the Commonwealth of Massachusetts, you are hereby required to notify and warn the inhabitants of the Town of Sudbury, qualified to vote in Town affairs to meet at the Lincoln-Sudbury Regional High School Auditorium, 390 Lincoln Road, in said Town on Monday, May 6, 2024, at 7:30 p.m., then and there to act on the following articles:

**ARTICLE 1. HEAR REPORTS**

To see if the Town will vote to hear, consider and accept the reports of the Town Boards, Commissions, Officers and Committees as printed in the 2023 Town Report or as otherwise presented; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD POSITION: The Select Board supports this article.

**ARTICLE 2. FY24 BUDGET ADJUSTMENTS**

*(Consent Calendar)*

To see if the Town will vote to amend the votes taken under Article 3, FY24 Budget, of the 2023 Annual Town Meeting, by adding to or deleting from line items thereunder, by transfer between or among accounts or by transfer from available funds; or act on anything relative thereto.

Submitted by the Select Board.

(Majority vote required)

SELECT BOARD REPORT: This article will allow flexibility to review all accounts within the FY24 Operating Budget to make adjustments at the Annual Town Meeting as necessary.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 3. FY25 BUDGET**

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, for any or all Town expenses and purposes, including debt and interest, and to provide for a Reserve Fund, all for the Fiscal Year July 1, 2024 through June 30, 2025, inclusive, in accordance with the following schedule, which is incorporated herein by reference:

| <b>EXPENDITURES</b>  | <b>FY25<br/>Recommended</b> |
|--|-----------------------------|
| 300: Education - Sudbury Public Schools (SPS)              | 45,785,871                  |
| 300: Education - LS Regional High School (LS) <sup>1</sup> | 29,497,481                  |
| 300: Education - Vocational                                | 450,000                     |
| <b>Total: Schools</b>                                      | <b>75,733,352</b>           |
| 100: General Government                                    | 3,817,526                   |
| 200: Public Safety <sup>4</sup>                            | 10,399,288                  |
| 400: Public Works <sup>5</sup>                             | 6,370,754                   |
| 500: Human Services  | 1,031,179                   |
| 600: Culture & Recreation                                  | 1,716,739                   |
| <b>Total: Town Departments</b>                             | <b>23,335,486</b>           |
| 800: Reserve Fund  | 300,000                     |
| 800: Town-Wide Operating and Transfers                     | 201,305                     |
| 700: Town Debt Service                                     | 4,897,465                   |
| 900: Employee Benefits (Town and SPS) <sup>2</sup>         | 16,487,414                  |
| 1000: OPEB Trust Contribution (Town and SPS) <sup>3</sup>  | 650,000                     |
| <b>TOTAL OPERATING BUDGET:</b>                             | <b>121,605,022</b>          |
| (not including Capital or Enterprise Funds)                |                             |

<sup>1</sup> Includes \$334,492 for OPEB and \$451,371 for Debt Service.

<sup>2</sup> Includes \$7,144,239 for Town and \$9,343,175 for SPS.

<sup>3</sup> Includes \$213,434 for Town and \$436,566 for SPS.

<sup>4</sup> Appropriation is partially funded by \$780,000 of ambulance receipts.

<sup>5</sup> Partially funded by \$44,494 of solar revolving fund receipts.

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed budget information, including details on each of these items in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the FY25 Budget.

**ARTICLE 4. FY25 CAPITAL BUDGET**

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums, or any other sum or sums, or authorize lease purchase agreements of up to five years, for the purchase or acquisition of capital items including but not limited to capital equipment, construction, engineering, design, renovation to buildings, equipping of vehicles, and all incidental and related expenses for projects:

|                                       | <b>FY25<br/>Recommended</b> |
|---------------------------------------|-----------------------------|
| <b>Operating Capital Budget</b>       |                             |
| Sudbury Public Schools                | 275,000                     |
| LS Regional High School               | 71,197                      |
| Fire                                  | 69,500                      |
| Public Works                          | 115,000                     |
| Combined Facilities                   | 98,000                      |
| <b>Total Operating Capital Budget</b> | <b>628,697</b>              |

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed budget information, including details on each of these items in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of the FY25 Capital Budget.

**ARTICLE 5. FY25 TRANSFER STATION ENTERPRISE FUND BUDGET** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY25 budget of the Transfer Station Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

|   | <b>FY23<br/>Actual</b> | <b>FY24<br/>Appropriated</b> | <b>FY25<br/>Requested</b> |
|---|------------------------|------------------------------|---------------------------|
| <b>TRANSFER STATION ENTERPRISE FUND</b> |                        |                              |                           |
| Direct Costs                            | 247,325                | 310,648                      | 312,318                   |
| Indirect Costs <sup>1</sup>             | 17,551                 | 17,551                       | 17,551                    |
| <b>Total Expenditures</b>               | <b>264,876</b>         | <b>328,199</b>               | <b>329,869</b>            |
| Enterprise Receipts                     | 216,689                | 328,199                      | 329,869                   |
| <b>Total Revenues</b>                   | <b>216,689</b>         | <b>328,199</b>               | <b>329,869</b>            |

<sup>1</sup> Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 6. FY25 POOL ENTERPRISE FUND BUDGET**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY25 budget of the Atkinson Pool Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

|                             | <b>FY23<br/>Actual</b> | <b>FY24<br/>Appropriated</b> | <b>FY25<br/>Requested</b> |
|-----------------------------|------------------------|------------------------------|---------------------------|
| <b>POOL ENTERPRISE FUND</b> |                        |                              |                           |
| Direct Costs                | 277,189                | 482,280                      | 492,783                   |
| Indirect Costs <sup>1</sup> | 40,733                 | 45,000                       | 45,000                    |
| <b>Total Expenditures</b>   | <b>317,922</b>         | <b>527,280</b>               | <b>537,783</b>            |
| Enterprise Receipts         | 403,328                | 527,280                      | 407,783                   |
| Retained Earnings Used      | -                      | -                            | 130,000                   |
| <b>Total Revenues</b>       | <b>403,328</b>         | <b>527,280</b>               | <b>537,783</b>            |

<sup>1</sup> Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 7. FY25 RECREATION FIELD MAINTENANCE ENTERPRISE FUND BUDGET**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or appropriate from available funds, the following sums set forth in the FY25 budget of the Recreation Field Maintenance Enterprise, to be included in the tax levy and offset by the funds of the enterprise:

|  | FY23<br>Actual | FY24<br>Appropriated | FY25<br>Requested |
|--|----------------|----------------------|-------------------|
| <b>FIELD MAINTENANCE ENTERPRISE FUND</b> |                |                      |                   |
| Direct Costs <sup>1</sup>                | 214,250        | 213,514              | 215,663           |
| Indirect Costs <sup>2</sup>              | 26,089         | 28,000               | 28,000            |
| <b>Total Expenditures</b>                | <b>240,339</b> | <b>241,514</b>       | <b>243,663</b>    |
| Enterprise Receipts                      | 216,689        | 241,514              | 243,663           |
| <b>Total Revenues</b>                    | <b>216,689</b> | <b>241,514</b>       | <b>243,663</b>    |

<sup>1</sup> Direct costs include \$10,500 of capital expenditures.

<sup>2</sup> Paid for by Enterprise Revenue Transfer to Unclassified Benefits (General Fund)

; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: See detailed information in the Finance Section of the Warrant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 8. SNOW AND ICE TRANSFER**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums of money, to be expended under the direction of the Town Manager, for the purpose of funding the Fiscal Year 24 Snow and Ice deficit; or act on anything relative thereto.

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER REPORT: This article will fund any deficit in the snow and ice account required due to the nature of this year’s winter.

SELECT BOARD POSITION: Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 9. UNPAID BILLS**

To see if the Town will vote to raise and appropriate, or transfer from available funds, a sum or sums of money for the payment of certain unpaid bills incurred in previous fiscal years which may be legally unenforceable due to the insufficiency of the appropriation in the years in which such bills were incurred; or act on anything relative thereto.

Submitted by the Town Accountant. (Four-fifths vote required)

TOWN ACCOUNTANT REPORT: Invoices that are submitted for payment after the accounts are closed at the end of a fiscal year or payables for which there are insufficient funds (and were not submitted for a Reserve Fund Transfer) can only be paid by a vote of the Town Meeting, a Special Act of the Legislature, or a court judgment.

SELECT BOARD POSITION. The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 10. CHAPTER 90 HIGHWAY FUNDING** (Consent Calendar)

To see if the Town will vote to authorize the Town Manager to accept and to enter into a contract for the expenditure of any funds allotted or to be allotted by the Commonwealth for the construction, reconstruction and maintenance projects of Town ways pursuant to Chapter 90 funding; and to authorize the Treasurer to borrow such amounts in anticipation of reimbursement by the Commonwealth; or act on anything relative thereto.

Submitted by the Director of Public Works. (Majority vote required)

DIRECTOR OF PUBLIC WORKS REPORT: Each year the Legislature allocates funds to cities and towns for the improvement of their infrastructure, to be expended under the Chapter 90 guidelines. The current plans are to continue the implementation of our pavement management program.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 11. FY25 STABILIZATION FUND** (Consent Calendar)

To see if the Town will vote to raise and appropriate or transfer from available funds, the sum of \$201,507, or any other sum or sums, to be added to the Stabilization Fund established under Article 12, of the October 7, 1982 Special Town Meeting, pursuant to General Laws Chapter 40, Section 5B; or act on anything relative

thereto.

Submitted by the Select Board. (Majority vote required)

SELECT BOARD REPORT: Based on the Select Board’s Budget and Financial Policies, the Town’s goal is to maintain in the Stabilization Fund an amount equal to 5% of the total projected general fund operating revenues for the last fiscal year. This Fund protects the Town in case of a severe emergency and is beneficial in supporting the Town’s AAA bond ratings, which in turn results in lowering borrowing costs.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 12. FY25 REVOLVING FUND SPENDING LIMITS** (Consent Calendar)

To see if the Town will vote to establish the FY25 spending limits for the use of revolving funds under M.G.L. c.44, s.53E ½, by the following departments of the Town, in accordance with each fund as set forth in Article XXXIII of the Town of Sudbury General Bylaws:

| <u>Fund</u>  | <u>Department</u>              | <u>Maximum Amount</u> |
|--|--------------------------------|-----------------------|
| Public Health Vaccinations & Tobacco Control         | Board of Health                | 50,000                |
| Plumbing & Gas Inspectional Services                 | Building Inspector             | 65,000                |
| Portable Sign Administration & Inspectional Services | Building Inspector             | 10,000                |
| Conservation (Trail Maintenance)                     | Conservation Commission        | 15,000                |
| Conservation (Wetlands)                              | Conservation Commission        | 50,000                |
| Forestry Activities                                  | Conservation Commission        | 10,000                |
| Council on Aging Activities                          | Council on Aging               | 65,000                |
| Council on Aging Van Transportation (MWRTA)          | Council on Aging               | 175,000               |
| Cemetery Revolving Fund                              | Public Works                   | 30,000                |
| Fire Department Permits                              | Fire                           | 70,000                |
| Goodnow Library Meeting Rooms                        | Goodnow Library                | 10,500                |
| Goodnow Library Services                             | Goodnow Library                | 25,000                |
| Recreation Programs                                  | Park and Recreation Commission | 570,000               |
| Teen Center  | Park and Recreation Commission | 15,000                |
| Youth Programs                                       | Park and Recreation Commission | 150,000               |
| Bus  | Sudbury Public Schools         | 600,000               |
| Instrumental Music                                   | Sudbury Public Schools         | 100,000               |
| Cable Television                                     | Town Manager                   | 30,000                |
| Rental Property                                      | Town Manager                   | 50,000                |
| Dog  | Town Clerk                     | 75,000                |
| Zoning Board of Appeals                              | Zoning Board of Appeals        | 50,000                |
| Solar Energy   | Combined Facilities            | 1,000,000             |

; or act on anything relative thereto.

Submitted by the Town Finance Director. (Majority vote required)

FINANCE DIRECTOR REPORT: As set forth in Article XXXIII of the Town of Sudbury General Bylaws, this article seeks authorization for Fiscal Year 2025 for revolving funds previously established pursuant to M.G.L. c.44, s.53E ½. Expenditures from each revolving fund are subject to the limitation established annually by Town Meeting or any increase therein as may be authorized in accordance with M.G.L. c.44, s, 53E ½. The maximum amount stated is the same as the FY24 maximum voted for each revolving fund except for the following: the Board of Health Public Health Vaccinations & Tobacco Control Fund increased from \$30,000 to \$50,000; the Public Works Cemetery Revolving Fund increased from \$20,000 to \$30,000; the Goodnow Library Meeting Rooms decreased from \$20,000 to \$10,500; the Park and Recreation Commission Recreation Programs decreased from \$650,000 to \$570,000; the Park and Recreation Commission Teen Center increased from \$10,000 to \$15,000; the Park and Recreation Commission Youth Programs decreased from \$200,000 to \$150,000 and the Sudbury Public Schools Bus account increased from \$450,000 to \$600,000.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 13. CAPITAL STABILIZATION FUND** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate or transfer from available funds, the sum of \$250,000, or any other sum, to be added to the Capital Stabilization Fund established under Article 13 of the 2018 Annual Town Meeting; or act on anything relative thereto.

Submitted by the Town Manager. (Majority vote required)

TOWN MANAGER REPORT: This transfer is for the purpose of saving funds for future capital needs.

BOARD OF SELECTMEN POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 14. REVOKE OPIOID SETTLEMENT STABILIZATION FUND**

To see if the Town will vote in accordance with the provisions of Chapter 77 of the Acts of 2023 to revoke the vote taken under Article 5 of the October 23, 2023 Special Town Meeting creating a new special purpose Opioid Settlement Stabilization Fund pursuant to G.L. c. 40, s. 5B; and to create a special revenue fund; and to place all past and future statewide opioid settlement receipts received or to be received by the Town into said special revenue fund to be expended without further appropriation for all of the purposes allowed by law, including those outlined in applicable opioid litigation settlement documents; or act on anything relative thereto.

Submitted by the Board of Health. (Two-thirds vote required)

BOARD OF HEALTH REPORT: On December 4, 2023, Governor Healey signed Chapter 77 of the Acts of 2023, Section 197 of which provides, in part, for the following exception to the general rule that all receipts, including opioid settlement receipts, are to be recorded as general fund revenue per G.L. c. 44, § 53. This allows for municipalities that have received or will receive funds in Fiscal Year

2024, or thereafter, pursuant to settlement agreements entered into by the Commonwealth with opioid distributors and opioid-makers for prevention, harm reduction, treatment, and recovery, may place said funds into a special revenue fund. The proceeds can then be expended, without further appropriation, at the direction of the chief executive officer only for the purpose identified in said settlement agreements. This article will revoke the Opioids Stabilization Fund, moving opioid settlement monies in a special revenue fund. Under the terms of the settlements, the funds may only be used for supplementing and strengthening the resources available to individuals and families for substance use disorder prevention, harm reduction, treatment, and recovery. Opioid settlement expenditures are reported by the Town to the State and are annually published on the Municipal Opioid Abatement Funds Data Dashboard in a fiscal year expenditure report.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 15. MEANS TESTED SENIOR TAX EXEMPTION EXTENSION**

*(Consent Calendar)*

To see if the Town will vote in the affirmative on the question: “Shall an act passed in the general court in the year 2012 entitled ‘An act authorizing the town of Sudbury to establish a means tested senior citizen property tax exemption’ be extended for another 3 years”; or act on anything relative thereto.

Submitted by the Board of Assessors.

(Majority vote required)

BOARD OF ASSESSORS REPORT: Chapter 10 of the Acts of 2016 allows for a continuation of the means tested senior citizen property tax exemption, originally authorized by Chapter 169 of the Acts of 2012, (the "Exemption Program"), provided Town Meeting approves the program continuation every 3 years. The program is due for continuation for the next 3 fiscal years. A majority vote at an Annual or Special Town Meeting is required for passage. The Exemption Program reduces real property taxes for certain low to moderate-income seniors through a redistribution of the property tax burden within the residential class. Therefore, there is a residential tax rate increase associated with the implementation of the Program (any exemption is shifted to the non-qualifying residential real property owners in Town). The exemption does not impact the Commercial, Industrial or Personal Property classes.

In FY 2014, 118 applications for the exemption were approved with an average benefit of \$2,450. In FY 2014, the average single-family tax increase attributable to the program was \$45.

In FY 2015, 124 applications for the exemption were approved with an average benefit of \$2,664. In FY 2015, the average single-family tax increase attributable to the program was \$60.

In FY 2016, 103 applications for the exemption were approved with an average benefit of \$3,288. In FY 2016, the average single-family tax increase attributable to the program was \$61.

In FY 2017, 111 applications for the exemption were approved with an average benefit of \$3,282. In FY 2017, the average single-family tax increase attributable to the program was \$63.

In FY 2018, 113 applications for the exemption were approved with an average benefit of \$3,664. In FY 2018, the average single-family tax increase attributable to the program was \$73.

In FY 2019, 112 applications for the exemption were approved with an average benefit of \$3,735. In FY

2019, the average single-family tax increase attributable to the program was \$67.

In FY 2020, 106 applications for the exemption were approved with an average benefit of \$3,999. In FY 2020, the average single-family tax increase attributable to the program was \$76.

In FY 2021, 101 applications for the exemption were approved with an average benefit of \$4,247. In FY 2021, the average single-family tax increase attributable to the program was \$75.

In FY 2022, 95 applications for the exemption were approved with an average benefit of \$4,201. In FY 2022, the average single-family tax increase attributable to the program was \$65.

In FY 2023, 82 applications for the exemption were approved with an average benefit of \$4,040. In FY 2023, the average single-family tax increase attributable to the program was \$57.

In FY 2024, 85 applications for the exemption were approved with an average benefit of \$4,249. In FY 2024, the average single-family tax increase attributable to the program was \$76.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 16: AMEND ZONING BYLAW, SECTIONS 2200 AND 7000, FIREARMS SAFETY BUSINESS USE**

To see if the Town will vote to amend the Sudbury Zoning Bylaw, Sections 2200 and 7000, as set forth below, by adding the following provisions; or act on anything relative thereto:

2200. PRINCIPAL USE REGULATIONS

**A.**

Insert in Section 2230, Table of Principal Use Regulations, Part C. Commercial, after “28. Marijuana Establishment” a new use category entitled “29. Firearm Business Use”, as shown in the table below.

| PRINCIPAL USE            | A-RES | C-RES | WI | BD | LBD | VBD | ID | LID | IP | RD |
|--------------------------|-------|-------|----|----|-----|-----|----|-----|----|----|
| C. COMMERCIAL            |       |       |    |    |     |     |    |     |    |    |
| 29. Firearm Business Use | N     | N     | N  | N  | N   | N   | SB | N   | N  | N  |

**B.**

2250. Firearm Business Use.

2251. Purpose: To establish reasonable criteria for the establishment of Firearm Business Uses in the Town of Sudbury to address public safety concerns arising from the operations of such businesses and the potential disruption of peace and quiet enjoyment of the community and to address the location, siting, design, placement, security, safety, monitoring and modifications of Firearm Business Uses within the Town to minimize the adverse impacts on Firearms Business Uses on adjacent properties, residential neighbors, schools and other locations where children congregate, and to protect and

promote the quality of the Town's neighborhoods, commercial and business districts, and the general health, safety, and welfare of the residents of Town.

2252. Compatibility with State and Federal Laws and Regulations: This bylaw is not intended to supersede federal or state laws or regulations except to the extent that any such laws or regulations allow the Town to adopt standards more stringent than other applicable legal requirements. No Firearm Business Use shall operate until the operator of such business has obtained all necessary federal, state, and other required local firearms approvals and licenses.

2253. Applicability: This section shall apply to all Firearm Business Uses. Unless in specific conflict with this section, all other applicable provisions of the Zoning Bylaw shall apply to Firearm Business Uses.

2254. Configuration and Operations – Firearm Business Uses shall be conducted entirely within a Building and shall comply with the following standards:

- a. The hours of operation for a Firearm Business Use shall not adversely impact nearby uses. The hours of operation shall follow all applicable statutory and regulatory requirements and shall be limited to 9:00AM-6:00PM.
- b. There shall not be more than one Firearm Business Use on a Lot.
- c. The Firearm Business Use shall procure and at all times while in operation maintain insurance issued by an insurance company licensed to do business in the Commonwealth, insuring the Firearm Business against liability for damage to property and for injury to, or death of, any person as a result of the theft, sale, lease or transfer, or offering for sale, lease or transfer of a firearm or ammunition, or any other operation of the Firearm Business. The limits of liability shall not be less than \$1,000,000 for each incident of damage to property or incident of injury to death to a person; provided however, that increased limits of liability may be required by the Special Permit Granting Authority upon a finding that the size of the operation warrants greater liability. Notice of termination of any applicable insurance must be given to the Special Permit Granting Authority at least 30 days prior to the effective date of the cancellation.
- d. Firearm Businesses shall submit a security plan to the Sudbury Police Department for review and approval prior to applying for special permit. Review of the plan may require an on-site inspection of the property. The security plan must include, but is not limited to, the following:
  1. Names and phone number of all management staff and employees.
  2. Firearms Business Uses shall conduct criminal history background checks in compliance with state and federal law. The Firearms Business Use shall submit written certification that no employees have past criminal history of felony record or are otherwise prohibited from firearms licensure under state and federal law.
  3. A plan showing exterior ground lighting.
  4. Description of security systems and alarms.
  5. 24-hour video surveillance system in parking lots, building entrances and exits and transaction or point-of-sale locations.
  6. Location of dumpsters shall be locked with screening.
  7. Floor plan showing interior layout of operation.
  8. Evidence of after-hours storage of all Firearms in locked containers or by otherwise securing the Firearms with tamper-resistant mechanical locks.

- e. The Special Permit Granting Authority shall require that Firearm Business notify the Police Department of any changes to the name or phone numbers of all management staff and keyholders.
- f. The Firearms Business Use shall be equipped with, and the operation of such Firearm Business Use shall maintain in working order at all times, security system to the satisfaction of the Town.
- g. A video surveillance system shall be installed and maintained which shall monitor all parking lot areas, main building entrances and exits, storage areas, and any and all transition areas for sale of merchandise. Recordings shall be maintained for a minimum of three (3) years. A sign no larger than 2 square feet shall be placed in a visible location on the building which notes that video surveillance is in use on the property.
- h. The exterior grounds, including the parking lot and landscape areas, shall be lit in such a manner that all areas are clearly visible at all times during business hours; all lighting shall be compliant with Section 3427f of the Zoning Bylaw and the International Dark Sky Association standards, as amended.
- i. No person under the age of eighteen (18) shall be permitted on the premises of the Firearms Business Use unless they are accompanied by a parent or legal guardian and notice of such limitation shall be posted outside the business.

2255. Storage of Firearms. Firearms shall be secured consistent with state and federal firearms security requirements, including, but not limited to, G.L. c. 140.

2256. Location Requirements. All distances in this section shall be measured in a straight line from the Lot line of the Lot containing the Firearm Business Use to the nearest Lot line of any of the following designated uses:

- a. A Firearm Business Use shall not directly abut any Lot containing a residential use.
- b. A Firearm Business Use shall not be located within 250 feet of the following uses: a public or private K-12 school, child care facility (including family daycare homes, daycare centers, preschools, and/or nursery schools), public park or playground, rail trail, establishment catering to minors or seniors, religious organization, business establishment that sells or serves malt, wine, or spirits for consumption off premises, or an existing Firearm Business Use.
- c. A Firearm Business Use shall not be located within a building containing a dwelling unit.
- d. The Special Permit Granting Authority may reduce the setback requirement between Firearms Business Uses in 2261b, if:
  - (1) The applicant demonstrates the Firearms Business Use would effectively be prohibited within the municipality without such waiver;
  - (2) The reduced setback distance will not create, exacerbate, or otherwise increase any public safety issues;
  - (3) The two Firearms Business Uses are owned independently; and
  - (4) The waiver is not inconsistent with the purposes and intent of this Bylaw.

2257. Special Permit for Firearm Business Use: In addition to the requirements of Section 6200, an application for Special Permit for Firearm Business Use shall include, at a minimum, the following information:

- a. Description of Activities: A narrative providing information about the type and scale of all activities that will take place on the premises.
- b. Lighting Analysis: A lighting plan showing the location of proposed lights on the building and the lot, and a photometric plan showing lighting levels.
- c. Context Map: A map depicting all properties and land uses within a 1,000-foot radius of the lot on which the Firearm Business Use is proposed to be located.
- d. Comprehensive Signage Plan in conformance with the Sign Bylaw.
- e. Report from the Police Chief or Designee: Confirming that the applicant has submitted the plans and information described in 2254 above and that those plans have been approved.
- f. Certificate of Insurance as required by Section 2254.c above.

2258. Special Permit Criteria: In granting a Special Permit for a Firearm Business Use, in addition to the general criteria for granting a Special Permit, the Select Board shall find that the following criteria are met:

- a. The Lot is designed such that it provides convenient, safe, and secure access and egress for clients and employees arriving to and leaving from the lot.
- b. The establishment will have adequate storage, security, and lighting.
- c. Loading, refuse, and service areas are designed to be secure and shielded from abutting uses.
- d. The establishment is designed to minimize any adverse impacts on abutters or pedestrians.
- e. The location and characteristics of the proposed use will not be detrimental to the public health, safety, and welfare of the neighborhood, which may extend into an adjacent municipality, or the Town.
- f. All signage has been reviewed and approved by the Building Commissioner or Design Review Board, as applicable, as to letter size, color, and design per section 3200 to ensure mitigation of impact to the surrounding neighborhood, consistent with applicable Federal and State law.
- g. The establishment has satisfied all of the conditions and requirements in this section.

2259. Limitation and Termination of Special Permit - No more than two Firearm Business Uses are allowed within the Town of Sudbury at any given time. A Special Permit for a Firearm Business Use shall be valid for one year. The owner of a Firearm Business Use shall annually apply to the Special Permit Granting Authority for renewal of the Special Permit, which renewal shall not exceed one (1) year.

A Special Permit for Firearm Business Use, if granted, shall at a minimum be issued in the name of a specific individual and is not transferable upon a sale, transfer, or assignment of the Firearms Business

Use. A special permit for a Firearm Business Use may be revoked for violation of the Sudbury Zoning Bylaw or state and federal law, including, but not limited to, G.L. c. 140, ss. 122B, 130, 131N. Upon expiration or cancellation of the policy of insurance as required herein, and if no additional insurance is obtained, the special permit may be revoked. The Special Permit granting authority may hold a public hearing with notice, posting and publication as required by G.L. c. 40A, §11 to consider revoking a Special Permit under this paragraph. A concurring vote of four members of the Select Board shall be necessary to revoke a special permit for a Firearms Business Use.

2260. Severability: The provisions of the Bylaw are severable. To the extent this Bylaw conflicts with G.L. c. 140 or other State laws or regulations currently in effect, the section shall be interpreted to minimize any conflict with State laws or regulations while maximizing the furtherance of the public safety and other public purposes underlying this Bylaw. The invalidity of any Section or provision of this Zoning Bylaw shall not invalidate any other Section or provision hereof.

### C. DEFINITIONS

Insert in Article 7000, Definitions, the following new definition:

**Ammunition:** Cartridges or cartridge cases, primers (igniters), bullets, tear gas cartridges, or propellant powder designed for use in any Firearm.

**Firearm:** Any device designed or modified to be used as a weapon capable of firing a projectile using an explosive charge as a propellant, including but not limited to guns, pistols, shotguns, rifles.

**Firearm Accessory:** Any device designed, modified, or adapted to be inserted into or affixed onto any Firearm to enable, alter, or improve the functioning or capabilities of the Firearm or to enable the wearing or carrying about one's person of a Firearm, including, but not limited to bags, siting systems, slings and scabbards, or maintenance kits.

**Firearm Business Use:** Any retail or wholesale operation involving the purchase or sale, in any amount of Firearms or Ammunition; sale of Firearm Accessories, in any amount; any retail or manufacturing operation involving, in any amount, the repairing, altering, cleaning, polishing, engraving, bluing or performing of any mechanical operation on any Firearm; and sale of conversion devices, in any amount, such as an auto sear, fuel filters or solvent filters, trigger switches and/or similar products that when combined create a firearm.

Submitted by the Select Board.

(Two-thirds vote required)

**SELECT BOARD REPORT:** The 2023 Annual Town Meeting considered a citizens' petition to ban firearms businesses in all zoning districts. During debate and discussion on the article, the Select Board committed to study the issue and return to a future Town Meeting with a proposal that ensures the safety of the community and its residents. After debate concluded, the Moderator called for a vote and the article was defeated. Over the past year, the Select Board, working with staff and Town Counsel, crafted a zoning bylaw amendment that a majority of the Board supports. The bylaw allows for not more than two firearms businesses to be located in Sudbury and ensures that any such businesses would be separated from sensitive uses. Moreover, the bylaw sets stringent standards that safeguard the community in the event that business opens.

**SELECT BOARD POSITION:** The Select Board supports this article.

**FINANCE COMMITTEE REPORT:** The Finance Committee will report at Town Meeting.

## **ARTICLE 17. ACQUISITION OF MBTA BUILDINGS**

To see if the Town will vote to authorize the acquisition, by gift or purchase, the fee interest in certain real property, together with the improvements thereon, known as (1) the "Section Tool House" identified as Assessor's Parcel K09-0067 located off of Boston Post Road, and (2) the "South Sudbury Train Station" identified as Assessor's Parcel K09-0054 located off of Union Avenue, for general municipal purposes, including without limitation, historic preservation purposes, on such terms and conditions as the Select Board deems appropriate, and further, to raise and appropriate, transfer from available funds or borrow a sum of money therefor, including all costs and expenses related thereto; or act on anything relative thereto.

Submitted by the Historical Commission.

(Two-thirds vote required)

**HISTORICAL COMMISSION REPORT:** The Sudbury Historical Commission is seeking to have the Town of Sudbury acquire two historic railroad related structures to ensure their preservation and historical interpretation for the residents of Sudbury.

The first structure is the Central Massachusetts Railroad Section House (Section House) located along the former Central Massachusetts Railway in South Sudbury alongside Route 20. The Section House was built in 1890 to house a track inspection car and track repair tools. A crew of men was responsible for inspecting and maintaining a section of track - usually 5-10 miles. The Section House foreman oversaw the section crew and the section house was the crew's headquarters. In the 1890's, there were 22 scheduled trains per day over this line consisting of 16 passenger trains and 6 freight trains. Trains ran fast and frequently so track maintenance was essential to keeping the trains running. At one time, section houses were found on all railroad lines throughout New England. This Section House was last used in 1958 when the B&M RR abolished section crews. This building is one of the few remaining section houses and the only original one known to still exist in Massachusetts, a tribute to the bygone era of railroad history.

This Section House is located within the Sudbury George Pitts Tavern Historic District and within the National-Register-determined-eligible Central Massachusetts Railroad Corridor Historic District. It has been under a long-term lease to the Town of Sudbury who has maintained the structure. It also sits alongside the Central Massachusetts Rail Trail presently under construction. The Sudbury Historical Commission has been working with the Massachusetts DCR to develop interpretative signage for the Section House for the benefit of the future users of the Central Massachusetts Rail Trail.

The second structure is the South Sudbury Railroad Station Building (Station Building). This Station Building was constructed in 1952 to serve as a replacement Railroad Station Building for the original South Sudbury Railroad Station Building which was demolished. The South Sudbury Station is located at the intersection of Union Avenue and Station Road, on the south side of the tracks. The Station Building is also located within the National-Register-determined-eligible Central Massachusetts Railroad Corridor Historic District. It is alongside the Central Massachusetts Rail Trail presently under construction and is also in proximity to the intersection of the Bruce Freeman Rail Trail under construction and the Central Massachusetts Rail Trail under construction. The one-

story frame building is capped by an asphalt-shingled, side-gabled roof with overhanging eaves. A metal stovepipe and chimney pierce the south roof slope. The building has a centered entrance on the north, trackside, elevation which is sheltered by a cross-gabled projection and wood corbels. The station interior contains an office and a passenger waiting room. The entrance leads to the waiting room, which has a tongue and groove wood floor. The walls are plaster above the wood wainscoting. The partition wall that separates the spaces has a doorway and a passthrough opening framed by an arched lintel.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 18: SWAP BODY TRUCKS W/ PLOW & VARIOUS BODIES**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or to transfer from available funds, the sum of \$560,000, or any other sum, for the purchase or acquisition and equipping of two (2) swap body trucks for the Department of Public Works; or act on anything relative thereto.

Submitted by the Public Works Director

(Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to purchase two new trucks with plow and various bodies to replace older models. The existing trucks are at their useful life-expectancy of about 15 years. It is the goal of the Public Works to focus on standardizing vehicles and specifying vehicles to better suit our multi-disciplinary needs. This proposal is to replace the existing dedicated spreaders with swap bodies (dump truck, spreader, chip body, etc.) to be used throughout all seasons.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 19 PICKUP TRUCK WITH PLOW**

*(Consent Calendar)*

To see if the Town will vote to raise and appropriate or transfer from available funds, the sum of \$120,000, or any other sum, for the purchase or acquisition and equipping of one (1) pickup truck with plow for the Department of Public Works; or act on anything relative thereto.

Submitted by the Public Works Director.

(Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to purchase a new pickup truck with a plow to replace an older model. It is a goal of the Public Works to focus on standardizing vehicles and specifying vehicles to better suit our multi-disciplinary needs. Pick-up trucks are one of the most used equipment in the fleet. The Public Works employees use these vehicles to perform their everyday tasks including moving materials and equipment that is carried and towed by these vehicles. These trucks also accompany larger equipment to perform snow removal.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 20. TOWN-WIDE CULVERT AND DRAINAGE RECONSTRUCTION**

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$625,000, or any other sum, for the Town-wide (various locations) culvert and drain replacement and appurtenances; or act on anything relative thereto.

Submitted by the Public Works Director.

(Majority vote required)

PUBLIC WORKS DIRECTOR REPORT: Approval of this article will provide funds to replace culverts and associated drain structures and appurtenances at various locations throughout the Town, including replacement of old corrugated metal pipe that deteriorates over time.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 21. DPW ROOF TOP HVAC UNIT REPLACEMENTS** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or transfer from available funds, \$200,000 to be expended under the direction of the Town Manager for the purpose of the replacement of the DPW roof top HVAC units, or act on anything relative thereto.

Submitted by the Combined Facility Director.

(Majority vote required)

Combined Facility Director Report: The six (6) HVAC roof top units that are on the DPW roof are 20 years old and as a result of the planned new roof installation, must be removed and reinstalled. Since the units are at their expected useful life, this request is to fund the replacement and electrification of said units. As these units are at the end of their useful life, if not replaced during the roof project, they will result in increased operational/repair costs until such time as they fail and/or are replaced.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 22. DPW SALT SHED VINYL COVER REPLACEMENT** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or transfer from available funds, \$125,000 to be expended under the direction of the Combined Facility Director for the purpose of the replacement of the DPW Salt Shed Storage Vinyl Cover, or act on anything relative thereto.

Submitted by the Combined Facility Director.

(Majority vote required)

Combined Facility Director Report: The vinyl cover on the salt storage facility is 20 years old. It has reached the end of its life expectancy. Replacement of this cover in advance of failure will be accomplished with the funding of this vinyl cover replacement.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 23. ATKINSON POOL RENOVATION**

To see if the Town will vote to raise and appropriate, borrow, or transfer from available funds, the sum of \$2,350,000, or any other sum or sums, to be expended under the direction of the Town Manager, for the purpose of replacing the existing roofing system, replacing pool mechanical equipment and associated piping, replacing the dive pool skimmers and associated piping, tile repair and re-grouting at the Atkinson Pool including all incidental and related expenses; or act on anything relative thereto.

Submitted by the Combined Facility Director. (Two-thirds vote required, if borrowed)

COMBINED FACILITY DIRECTOR REPORT: The Atkinson Pool, built in 1987, houses a notarium, pool viewing area, aquatics office, boiler and chemical room. The new Fairbank Community Center has been built and attached to the Atkinson Pool. On the roof of the associated boiler room is a dehumidification unit. The dehumidification unit is responsible to control the humidity and the natatorium interior air quality. The roof and the dehumidification unit have reached the end of their useful life. The boiler room houses the water filtration equipment, the chemicals and associated equipment as well as the boiler equipment. There is insufficient air filtration and the proximity of the chemicals to the boilers creates a corrosive environment and premature failure of the boilers. The pool deck and pool interior tile shows significant deterioration and require isolated tile replacement and full re-grouting. During the construction of the new Fairbank Center it was discovered that the dive pool skimmers are deteriorated and leaking. These skimmers are incased in concrete several feet below the pool deck. Tile repair will be required in this area after the skimmer replacement is completed. This funding request is to replace the roof with a solar ready roof, replace the dehumidification unit, separate the chemical and boiler rooms by creating a separate room with adequate ventilation within the boiler/electrical room footprint, repair and re-grout the tile.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 24. SPS SCHOOL CLASSROOM INSTRUCTIONAL EQUIPMENT REPLACEMENT** (Consent Calendar)

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$100,000, or any other sum or sums, to be expended under the direction of the Sudbury Public School Department for the replacement of School Classroom Instructional Equipment in the Curtis Middle School, Haynes Elementary School, Loring Elementary School, Nixon Elementary School and Noyes Elementary School including all incidental and related expenses; or act on anything relative thereto.

Submitted by the Sudbury School Committee. (Majority vote required)

SCHOOL COMMITTEE REPORT: The article seeks funding for the purpose of purchasing and replacing classroom instructional equipment in twenty (20) total classrooms in all five (5) school buildings. Current equipment is 12-15 years old and have exceeded their useful life.

Sudbury Public Schools positions technology in instructional spaces to support communication and collaboration. The schools provide tools that support student collaboration, differentiation of instruction, and accessibility options for all students.

The District's standard set of classroom instructional equipment includes 1) an interactive display that provides a visual resource for displaying materials to the entire class with touch components allowing students to interact with educational content using a pen or touch; 2) wireless video projection for teacher mobility around the classroom while also permitting students to project directly from their devices; 3) auditory support for classroom instruction ensuring all students can receive instruction with clarity benefiting all students regardless of whether they have an issue with hearing; and, 4) document cameras allowing for immediate presentation of non-digital resources to the classroom.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 25. SPS HAYNES ELEMENTARY SCHOOL DEHUMIDIFICATION HVAC**  
*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$150,000, or any other sum or sums, to be expended under the direction of the Sudbury Public School Department for the purpose of the addition, replacement, and/or relocation of HVAC ventilation and air conditioning systems in the Haynes Elementary School including incidental and related expenses associated therewith; or act on anything relative thereto.

Submitted by the Sudbury School Committee. (Majority vote required)

SCHOOL COMMITTEE REPORT: The Haynes Elementary School has areas of the building that develop condensation on the tile floors and surfaces during humid weather conditions creating a safety risk to students, staff, and the public. This condition is caused by the inability of the current HVAC system to temper (cool) the air as it enters the building. Humidity that is pumped into the building from the exterior then condensates on cool tile surfaces (walls and floors).

The requested funds will be used for the addition, replacement, and/or relocation of HVAC systems that will temper the outside air during high humidity days.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 26. LINCOLN-SUDBURY REGIONAL HIGH SCHOOL LIGHTING CONTROL REPLACEMENT**  
*(Consent Calendar)*

To see if the Town will vote to raise and appropriate, borrow, or transfer from available funds, the sum of \$144,585, being the Town's 87.31% share of the total estimated construction project of \$165,600, to be used together with the amount requested from the Town of Lincoln for its 12.69% share, being the sum of \$21,015, for the purpose of replacing the Lighting Control Analog Panels on the property of Lincoln-Sudbury Regional High School, including any incidental and related costs; or act on anything relative thereto.

Submitted by the LSRHS Committee.

(Majority vote required)

LSRHS COMMITTEE REPORT: Purpose: This project is the original interior lighting control panels as part of the new high school construction in 2004. The expected life expectancy was 15 years and the analog panels are no longer supported by manufacturers or repair vendors. Analog systems have become obsolete with digital based boards and panels. Due to supply chain and labor shortage issues, only a formal bid will be able to determine the final cost expected. Given the long lead time and process for approval, we would conduct the bid in the spring with a confirmation of approval.

Cost: The estimated cost includes a 5% contingency allocation totaling \$165,000 with Sudbury's share of 87.31% at \$144,585 for the Sudbury request. LS is also requesting Lincoln's share of 12.69% totaling \$21,015 that has been approved by the Lincoln Capital Committee as an accepted capital project.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 27. LINCOLN-SUDBURY REGIONAL HIGH SCHOOL EXTERIOR STAIRWELL REPLACEMENT** *(Consent Calendar)*

To see if the Town will vote to raise and appropriate, borrow, or transfer from available funds, the sum of \$130,975, being the Town's 87.31% share of the total estimated construction project of \$150,000, to be used together with the amount requested from the Town of Lincoln for its 12.69% share, being the sum of \$19,035, for the purpose of replacing exterior stairwells on the property of Lincoln-Sudbury Regional High School, including any incidental and related costs; or act on anything relative thereto.

Submitted by the LSRHS Committee.

(Majority vote required)

LSRHS COMMITTEE REPORT: Purpose: This project is to replace the original building exterior stairwells with the new high school construction in 2004. The expected life expected was 20 years but with extreme winters and ground treatments they are significantly failing. They are considered a safety compliance item as

The safety of students, faculty and members of the public are impacted. The first year of request was denied for construction, however, the architectural study required for a more definitive construction cost was approved and completed in 2023. The results of the architectural study are provided as a detailed example for cost estimate in this's construction capital request.

The project will provide a safe exterior walkway from building to building and will be updated with more architectural components and materials to reach new life expectancy of stairwells. Accomplishing this construction project will relieve safety concerns for use, especially during seasonal challenges of falling leaves, rain, snow and ice.

Cost: The estimated cost includes a 7% contingency allocation totaling \$150,000 with Sudbury's share of 87.31% at \$130,975 for the Sudbury request. LS is also requesting Lincoln's share of 12.69% totaling \$19,035 that has been approved by the Lincoln Capital Committee as an accepted capital project.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 28 . ELECTRIC CAR CHARGING STATIONS FOR GOODNOW LIBRARY**

To see if the Town will vote to raise and appropriate, or transfer from available funds, the sum of \$80,000, or any other sum or sums, to be expended under the direction of the Combined Facilities Director, for the purchase and equipping of electric car charging stations, associated design services, and installation services for the Goodnow Library, located at 21 Concord Road, and any other incidental and related expenses associated therewith; or act on anything relative thereto.

Submitted by the Goodnow Library Trustees.

(Majority vote required)

GOODNOW LIBRARY TRUSTEES REPORT: This project was in progress with approximately half of the funding coming from the Solar Energy Revolving Fund and the other half coming from government grants. Unfortunately, the government grants have fallen through. Currently the Solar Energy Revolving Fund has a balance of approximately \$1 Million dollars, so we are hoping that the full cost can be covered by the Solar Energy Revolving Fund, Free Cash, or within the Town Manager’s Capital budget. Sudbury has been proactive with green energy initiatives and electric car chargers are a great next step.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 29. AMEND GENERAL BYLAW ARTICLE XV, BUILDING PERMIT FEES**

To see if the Town will vote to amend General Bylaw Article XV, Building Code, Section 1, Building Permit Fees, by amending certain fees charged by the Building Department, as described below; or act on anything relative thereto.

| <b>PERMIT TYPE</b>   | <b>CURRENT FEE</b>         | <b>PROPOSED FEE</b>        |
|--|----------------------------|----------------------------|
| <u>Single Family Dwellings.</u>                            |                            |                            |
| New, alterations, additions                                | \$10/\$1,000 value         | \$12/\$1,000 value of work |
| Minimum Permit Fee   | \$40                       | \$50                       |
| <br><u>Commercial Buildings and Multi-Family Dwellings</u> |                            |                            |
| New, alterations, additions                                | \$15/\$1,000 value of work | \$15/\$1,000 value of work |
| Minimum Permit Fee   | \$40                       | \$50                       |
| <br><u>Sheet Metal Permit Fees</u>                         |                            |                            |
| Single Family Dwellings                                    | \$10/\$1,000 value of work | \$12/\$1,000 value of work |
| Commercial & Multi Family                                  | \$15/\$1,000 value of work | \$15/\$1,000 value of work |
| Minimum Permit Fee   | \$40                       | \$50                       |

Plumbing & Gas Permit: Residential, Commercial & Multi-Family

|   |      |      |
|---|------|------|
| First Fixture (new or renovation)   | \$55 | \$60 |
| Each additional fixture   | \$8  | \$12 |
| Replacement Fixture (1 inspection)<br>(dishwasher, range, dryer, boiler etc.) | \$30 | \$50 |
| Reinspection Fee  | \$30 | \$50 |

Electrical Permit Residential  
& Commercial

|                        |                         |                         |
|------------------------|-------------------------|-------------------------|
|                        | \$3/\$100 value of work | \$3/\$100 value of work |
| Reinspection Fee       | \$30                    | \$50                    |
| Minimum Permit Fee     | \$30                    | \$50                    |
| Industrial Maintenance | \$200 (annual)          | \$250 (annual)          |

Other Charges

|  |      |      |
|--|------|------|
| Lost or Replacement Permit Card            | \$0  | \$75 |
| Certificate of inspection per IBC s. 110.7 | \$40 | \$60 |

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER'S REPORT: Fees are charged to offset the cost of providing services. The cost of providing services changes over time and fees need to be adjusted to keep pace with inflation. Town Meeting last revised Building Permit fees in April 2009. A survey of area communities shows that Sudbury's fees lag its market peers. The proposed adjustment of fees brings Sudbury's fees more in line with peer communities.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 30. AMEND GENERAL BYLAWS ARTICLE XXII CONSERVATION COMMISSION PERMIT FEES**

To see if the Town will vote to amend General Bylaw Article XXII, Wetlands Administration, Section 4. Applications for Permits and Requests for Determination, by amending the fees charged by the Conservation Commission, as described below; or act on anything relative thereto.

| Category                                      | Current | Propose   |
|---|---------|---|
| <b>Category A: Single minor project</b>       | \$25    | \$100 plus \$0.50 per square foot impact to unaltered Adjacent Upland Resource Area |
| <b>Category B: New single-family dwelling</b> | \$250   | \$300 Plus \$0.75 per square foot impact to unaltered Adjacent Upland Resource Area |

|   |  |   |
|---|--|---|
| <b>Category C: Subdivision-- road and utilities only</b>                                    | \$500 plus \$2 per foot of road sideline within a resource area                  | No Change Proposed  |
| <b>Category D: Drainage, detention/retention basins</b>                                     | \$500 plus \$2 per 100 cubic feet of basin within a resource area                | No Change Proposed  |
| <b>Category E: Multiple Dwelling Structure</b>  | \$500 plus \$100/unit, all or part of which is within a resource area            | No Change Proposed  |
| <b>Category F: Commercial and Industrial Projects</b>                                       | \$500 plus \$0.50 per square foot of disturbance in an undeveloped resource area | \$1000 plus \$0.75 per square foot of disturbance in an undeveloped resource area |
| <b>Category G: Application filed after Enforcement</b>                                      | Double the fee   | No Change Proposed  |
| <b>Category H: Determination of Applicability</b>   | No Fee   | \$75  |
| <b>Category I: Remediation of a Contaminated Site or Enhancement of a Degraded Resource</b> | \$25   | \$500   |

Submitted by the Town Manager.

(Majority vote required)

TOWN MANAGER'S REPORT: Fees are charged to offset the cost of providing services associated with administering the Sudbury Wetlands Administration Bylaw. The cost of providing services changes over time and fees need to be adjusted to keep pace with inflation. Town Meeting last revised Wetland Bylaw fees in 1999. Anevaluation of area communities shows that Sudbury's fees lag its market peers. The proposed adjustment of fees brings Sudbury's fees more in line with peer communities.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 31. AMEND ZONING BYLAW: CODIFICATION – ADDITIONAL CHANGES**

To see if the Town will vote to adopt the following changes to the Zoning Bylaw as set forth in the Final Draft of the Code of the Town of Sudbury, dated September 2023, on file with the Town Clerk; or

act on anything relative thereto.

**Specific Revisions:**

Section 1310 is amended to read:

Buildings, structures or signs may not be erected, structurally altered, moved, or changed in use and land may not be substantially altered or changed in principal use unless such action is in compliance with then-applicable zoning and that all necessary permits have been received under federal, state, or local law. All building permits shall be posted conspicuously on the premises to which they apply during the time of construction.

The second paragraph of original Sec. 2210, regarding the meaning of symbols in the Table of Principal Use Regulations, of the Zoning Bylaw is repealed.

Sections 2326 and 2327 are amended to read in relevant part: "See Appendix B, Table of Dimensional Requirements."

Section 3113e is amended to read: "The reduction in the number of required spaces will not create undue congestion or traffic hazards, and that such relief may be granted without substantial detriment to the neighborhood and without derogating from the intent and purpose of this bylaw."

Section 3290 is amended to read in relevant part: "In granting such special permit, the Zoning Board of Appeals shall specify the size and location of the sign or signs and shall impose such other terms and restrictions as it may deem to be in the public interest."

Section 3294B is amended to read: "Has been destroyed or damaged to the extent that the cost of repair or restoration will exceed 1/3 of the replacement value as of the date of destruction."

Section 4130, under the heading "Floodplain Boundaries," is amended to read in relevant part: "The FIRM and Flood Insurance Study booklet are incorporated herein by reference and are on file with the Town Clerk, Planning Board, Building Inspector, Conservation Commission and Engineering Department."

The following sections are amended to update the references to former Section 4221 to read "Section 7110": Sections 4230, 4242a and b, 4243j, 4252b, and 4253h.

Sections 4242p and 4252n are amended to read in relevant part: "Any existing facility with such a drainage system shall be required to either seal the floor drain (in accordance with the state plumbing code, 248 CMR 10.00), ..."

Section 4261e is amended to change "Treasurer of the Town" to "Treasurer-Collector of the Town."

Section 4270 is amended to read in relevant part: "The special permit granting authority under Section 4200 shall be the Planning Board."

Section 4623b is amended to read: "The applicant demonstrates that the medical marijuana treatment center will employ adequate security measures to prevent diversion of medical marijuana to minors who are not qualifying patients pursuant to 935 CMR 500 et seq."

Section 4642 is amended to read in relevant part: "The permit holder shall file a copy of any incident report required under 935 CMR 501.110 with the Zoning Enforcement Officer and the Sudbury Police Department within 24 hours of creation by the medical marijuana treatment center."

Section 4720A is amended to read in relevant part: "Except as explicitly provided elsewhere in Section 4700A, the provisions and requirements of other applicable zoning districts, and any rules, regulations, approval processes and/or design or performance standards contained elsewhere in this Zoning Bylaw, shall not apply to any project developed pursuant to Section 4700A; notwithstanding the above, Section 3200 (Signs and Advertising Devices), shall apply."

Section 4700B, Subsection I2b, is amended to read in relevant part: "Upon receipt by the approving authority, applications shall be distributed to the Building Inspector, Fire Chief, Police Chief, Health Department, Conservation Commission, the Town Manager, the Select Board, and the Department of Public Works."

Sections 5151, 5361c, and 5461c are amended to change "Soil Conservation Service" to "Natural Resources Conservation Service."

Section 5332 is amended to read in relevant part: "An SRC shall constitute housing intended for persons of age 55 or over within the meaning of MGL c 151B, § 4, Subdivision 6, and 42 U.S.C. § 3607(b)(2)(C)."

Section 6132 is amended to read: "There must be a substantial hardship to the owner, financial or otherwise, if the provisions of the ordinance or bylaw were to be literally enforced."

Section 6134 is amended to read: "Granting the variance must not nullify or substantially derogate from the intent of purpose of the ordinance or bylaw."

Section 7110. Definition of "sign."

The definition of "fuel pump sign" is amended to read: "In accordance with MGL c. 94, § 295C, standard gasoline fuel pump signs on service station fuel pumps bearing thereon in usual size and form the name, type and price of the gasoline."

The definition of "nonconforming sign" is amended to read: "Any sign that existed on the effective date of this bylaw (or amendment thereto) and does not comply with the regulations set forth herein."

Appendix A, Table of Principal Use Regulations, attached to this bylaw is amended as follows:

In entry C28, marijuana establishment, a superscript "8" is added after the type of permitted use in each district.

In the notes following the table, Note 8 is added to read "For medical marijuana treatment centers, see Section 4620."

Submitted by the Town Clerk.

(Two-thirds vote required)

TOWN CLERK REPORT: The goal of recodification is to update and revise the Town of Sudbury General and Zoning Bylaws to be clearer, internally consistent, and in compliance with M.G.L. Chapter 40A. To this end, in 2021 the Town retained General Code, LLC at a cost of \$10,000 to professionally codify the Town's General and Zoning Bylaws. General Code has undertaken a complete review of the Town's bylaws to with the assignment to eliminate inconsistencies, errors and outdated information. In addition, the Town Code will

be renumbered and will incorporate gender-neutral language.

At the 2023 Fall STM this article was submitted along with three other articles seeking to recodify the Town's General and Zoning Bylaws. 2023 STM Articles 1 through 3 which authorized the renumbering and other non-substantive changes of the zoning and general bylaws passed.

STM Article 4, which is now Article 31, which included specific revisions, did not pass by the required 2/3 vote. The result is that the renumbering and recaptioning of the zoning bylaws will not be consistent with the rest of the bylaws which will cause confusion to users. Therefore, this article has been resubmitted for approval so that the recodification process may be completed.

During the 2023 STM there were concerns voiced that some of the proposed revisions would alter the authority for determining certain fees from Town Meeting to individual boards. Those proposed revisions were removed from this Article. All of the current revisions are non-substantive in nature. A redlined version of Article 31 is available in the Town Clerk's office and on the Town Clerk's web page, highlighting the current bylaws with the proposed changes.

After this Article is approved by Town Meeting and by the Attorney General's office, the Sudbury Town Code will become electronically available to staff and residents as a fully searchable on-line resource. Going forward, this new platform will also make it easier and quicker to update the Town Code after each Town Meeting.

SELECT BOARD POSITION: The Select Board supports this article.

**ARTICLE 32. AMEND ZONING BYLAW ARTICLE IX, SECTION 6300, SITE PLAN REVIEW**

To see if the Town will vote to amend the Zoning Bylaw Section 6390A Lapse and Appeal by deleting the sentence "An appeal from a decision of the Planning Board relating to the substantive provisions of the Zoning Bylaw pursuant to section 6300 shall be taken in accordance with the provisions of G.L.c.40A,s.8," and replacing it with "An appeal by any person aggrieved by any site plan decision of the Planning Board shall be taken per MGL c. 40A, § 17, as amended."; or act on anything relative thereto.

Submitted by the Planning Board.

(Two-thirds vote required)

PLANNING BOARD REPORT: The Site Plan Review process is a formal review of commercial development with a significant level of professional work, input from a variety of professionals, Town Officials, and residents on each project. The decisions that are rendered at the close of each public hearing are thorough and often outline numerous conditions developed to protect residents, and enhance development within Sudbury. The language as written in the existing Bylaw would direct any appeal of the Planning Board's decision to be reviewed and acted upon by the Zoning Board of Appeals.

This is not a role that was envisioned for the Zoning Board of Appeals in its governing statute and is not a role it serves for any other Board, Committee, or Commission. The Zoning Board of Appeals does hear petitions of those individuals who are aggrieved by the decision of the Building Inspector, an individual, on zoning matters specially.

The proposed language change would direct appeals of Site Plan Review decisions to a court of competent jurisdiction which generally would be Land Court or Superior Court. With this change appeals of Site Plan

Review decisions would be handled in the same manner as the appeal of Special Permit decisions issued by the Zoning Board of Appeals.

SELECT BOARD POSITION: The Select Board supports this article.

**ARTICLE 33. AMEND ZONING BYLAW ARTICLE IX: INSERT SECTION 4700C  
MULTI-FAMILY OVERLAY DISTRICT**

To see if the Town will vote to amend the Zoning Bylaw, Article IX, by inserting a new Section 4700C "Multi-Family Overlay District", as set forth in the document entitled "Multi-Family Overlay District" dated 31 January 2024 and on file with the Town Clerk, and to amend the Zoning Map as shown on a plan entitled "Multi-Family Overlay District Map", dated 31 January 2024, and on file with the Town Clerk; or act on anything relative thereto.

Submitted by the Planning Board.

(Majority vote required)

PLANNING BOARD REPORT: This article is put forth by the Planning Board in response to the Legislature's adoption of Section 3A of Chapter 40A of the General Laws, commonly known as MBTA Communities Zoning. This Section of the General Laws requires any community defined in Chapter 161A Section 1 of the General Laws as an "MBTA Community" to adopt a Zoning Bylaw that allows multi-family development at a density of 15 units per acre by-right before the end of the calendar year 2024. If a municipality does not adopt a compliant Zoning District the Commonwealth may prohibit that community from accessing a variety of State funding streams in the form of grants and other financial assistance. Furthermore, the Attorney General has put communities on notice that willful disregard for this requirement may result in her office pursuing legal remedies.

The Bylaw submitted by the Sudbury Planning Board meets this requirement and places the proposed by-right multi-family districts at the location of the existing residential developments at Meadow Walk and Cold Brook Crossing. Although the Commonwealth has required that these Zoning Districts be created, there is no requirement that any new units be approved or constructed for a municipality to be considered compliant.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 34. AMEND ZONING BYLAW ARTICLE IX: SECTION 5600  
INCLUSION OF AFFORDABLE HOUSING**

To see if the Town will vote to amend the Zoning Bylaw, Article IX, Section 5623 by adding the words "Section 4700C Multi-Family Overlay District", as shown below; or act on anything relative thereto.

Developments which are permitted under the following regulations shall be exempt from this Section 5600, in its entirety: Massachusetts General Law Chapters 40B or 40R, and from this Zoning Bylaw Section 4700A North Road Residential Overlay District, Section 4700B Melone Smart Growth Overlay District, **Section 4700C Multi-Family Overlay District**, Section 5300 Senior Residential Community, and Section 5400 Incentive Senior Development.

Submitted by the Planning Board.

(Majority vote required)

PLANNING BOARD REPORT: The adoption of the section 3A of Chapter 40A of the General Laws limits the ability of municipalities to require affordable housing greater than 10% of the units in a development, which the language of Section 5600 exceeds. The language in Section 4700C includes provisions for 10% of the housing in developments permitted under that Overlay District to meet the Executive Office of Housing and Livable Communities affordability standards in order to comply with the legislation. This amendment would allow Sudbury to remain compliant with the MBTA Communities Zoning standards.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 35. COMMUNITY PRESERVATION ACT FUND – WAYSIDE INN ROAD BRIDGE RECONSTRUCTION** *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$400,000, for Historic Resources purposes under the Community Preservation Act from Historic Resources Reserves to reconstruct the Wayside Inn Road Bridge superstructure over the Hop Brook tributary which is located approximately 1,000 feet westerly from the Wayside Inn. The structure is located within the Wayside Inn Historic District. Construction shall include replacement/repair of the parapet walls, portions of the bridge deck, guardrail, pavement, grading, loam, seed and associated work including any incidental and related expenses; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This project will enhance the aesthetics of the Wayside Inn Historic District by reconstructing the portions of the bridge visible from the street and surroundings. The existing span of this structure triggers review by MassDOT under M.G.L. Chapter 85, Section 35. Therefore, the parapet walls and guardrails need to meet specific design criteria to sustain an impact by a motor vehicle. Structural design will provide the requisite crash rating while restoring the historic appeal to the bridge in the Wayside Inn Historic District. The westbound parapet wall on the Wayside Inn Road Bridge was severely damaged as a result of a motor vehicle accident on July 4, 2019. Immediately following this accident, the Public Works Department installed temporary barriers at the edge of the bridge deck. Additionally, the Public Works Department had the bridge re-inspected by Mass DOT. Results of the inspection concluded that, in its post-accident condition, the "unpinned temporary barriers in place cannot satisfactory address the safety concerns for the site. It is our (MassDOT's) recommendation that temporary barriers and bridge approach transitions that have been crash tested for a test level consistent with the level of service of roadway be installed as soon as possible. The conditions as they exist are considered unsafe and should remediated immediately".

At the Annual Town Meeting in September, 2020, the Town was allocated \$125,000 for the purpose of designing the replacement superstructure over Hop Brook. Since then, Sudbury's DPW has worked with the Historic Districts Commission and the state DOT to design a bridge system that is both safe, aesthetically appealing and historic looking. The proposal is to provide a stone veneer wall anchored to a

powder-coated steel guardrail barrier.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 36. COMMUNITY PRESERVATION ACT FUND - BRUCE FREEMAN RAIL TRAIL - PHASE 3** *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$600,000 for Open Space and Recreation purposes under the Community Preservation Act from FY25 CPA Estimated Annual Revenues and then from the CPA General Reserve Funds if needed, for the purpose of advancing the design and construction of the Bruce Freeman Rail Trail (BFRT) Phase 3, extending south of the intersection with the Mass Central Rail Trail to Eaton Road West near the Framingham city line; including any incidental and related expenses; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town of Sudbury seeks CPA funds to continue advancing the design and construction of the Bruce Freeman Rail Trail (BFRT) Phase 3, extending south of the intersection with the Mass Central Rail Trail to Eaton Road West just inside the Framingham city line.

The Town staff and members of the Rail Trail Advisory Committee are currently working with design engineering consultants, Fuss & O'Neill, to begin the 25% design phase of this final 1.4- mile portion of the BFRT, which is expected to be completed by June 30, 2024 and submitted to Mass DOT for review and comment. After the 25% plan review, the next phase of design will be underway to continue design to the final Plan, Specification and Estimate (PS&E) phase, after which Mass DOT will be responsible to advertise the project for construction.

Fuss & O'Neill completed a "Feasibility Study for the Bruce Freeman Rail Phase 3 Extension" in June 2023, which is available on the Town's website under the Rail Trail Advisory Committee\_ page. That study provides an "anticipated construction cost" of \$1,240,000 for Design/Permitting using the recommended alternative for crossing Boston Post Road/Route 20 (an at grade signalized crossing).

This request is for funds that will allow completion of the design/permitting as envisioned. The Town will also seek additional funds through grants or funding awards as the project design is underway.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 37. COMMUNITY PRESERVATION ACT FUND – HOUSING AUTHORITY ALLOCATION** *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$450,000 for Community Housing purposes under the Community Preservation Act, from FY25 CPA Estimated Annual Revenue and then from CPA General Reserve Funds, if needed, for the purpose of the acquisition, creation, preservation and support of community housing as allowed by the Community Preservation Act; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

**COMMUNITY PRESERVATION COMMITTEE REPORT:** This article requests an appropriation to the Sudbury Housing Authority (SHA) for the acquisition, creation, preservation and support of community housing. The SHA intends to use the funds for the redevelopment of two obsolete single-family homes in its portfolio (21 Great Lake Drive and 8 Oakwood Avenue).

The SHA is a quasi-governmental entity overseen by the state The Executive Office of Housing and Livable Communities (EOHLC) under 760 CMR. While locally controlled, and created by Town Meeting in 1971 under MGL Chapter 121B, Section 3, it is not legally a part of Sudbury's Town government.

21 Great Lake Drive and 8 Oakwood Avenue are single-family homes that SHA owns and operates as state-assisted public rental housing for families. Both of the homes, which are located in the Pine Lake neighborhood, have significant capital needs. 21 Great Lake Drive is currently vacant due to a variety of concerns with the 1960s-era structure, particularly water/moisture damage. It has been challenging for SHA to address these capital needs due to the limited amount of operating and capital funding that it receives from the State.

The SHA has consulted with an architect, an engineer, and an affordable housing development consultant regarding the possibility of demolishing these two older homes and replacing them each with two-bedroom duplex homes that are architecturally compatible with the neighborhood. Each of these experts has provided information that supports the current plans. The current funding from the CPA, in addition to previous CPA allocations to the SHA, would leverage state funding which would also be supplemented by a mortgage to be held by the SHA. Indeed, the SHA has recently been advised that this development qualifies for state funding. SHA will work with the community and the various Town Boards and committees during 2024 with the goal of reaching agreement to proceed to construction in 2025.

**SELECT BOARD POSITION:** The Select Board supports this article.

**FINANCE COMMITTEE REPORT:** The Finance Committee recommends approval of this article.

**ARTICLE 38. COMMUNITY PRESERVATION ACT FUND – HOUSING TRUST ALLOCATION**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$380,000 for Community Housing purposes under the Community Preservation Act from FY25 CPA Estimated Annual Revenues and then from the CPA General Reserve Funds if needed, as a grant to the Sudbury Housing Trust for the purpose of supporting community housing through the provision of grants loans, rental assistance, security deposits, interest-rate write downs, or other forms of assistance for the purpose of

making housing affordable; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Sudbury Housing Trust requests Community Preservation Act (CPA) funding to support the creation new affordable homeownership units of housing.

These funds will augment previously allocated funds to support community housing through the provision of grants loans, rental assistance, security deposits, interest-rate write downs, or other forms of assistance for the purpose of making housing affordable. The Trust has not created any new units since FYI6 and looks forward to creating housing opportunities for first-time homeowners in Sudbury.

This CPA funding request would enable the Trust to bring new units of affordable housing to Sudbury's existing inventory. This could be through the Trust's Home Preservation Program which converts existing smaller market homes to affordable homes and provides affordable homeownership opportunities to income eligible households, or other means. The Trust is the main, if not the only, entity whose mission is to create affordable homeownership units in Sudbury. Through this program, the Trust has seen tenants renting from the Sudbury Housing Authority become homeowners. In other instances, owners of deed restricted properties have been able to purchase market rate homes in town. These demonstrate first-hand the benefits of a homeownership program. Sudbury has 37 ownership units in its affordable housing portfolio; a number which has stayed constant since 2016. The seven-year hiatus will end with new affordable units created from the funds requested.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 39. COMMUNITY PRESERVATION ACT FUND – REMEDIATION OF WATER CHESTNUTS FROM HOP BROOK POND SYSTEM**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$56,221 for Open Space and Recreation purposes under the Community Preservation Act from FY25 CPA Estimated Annual Revenue and then from the CPA General Reserve Fund, if needed, as a grant to the Hop Brook Protection Association for the purpose of remediating/removing water chestnuts and other invasive species from the Hop Brook pond system and to authorize the Select Board to enter into a grant agreement on such terms and conditions as it deems appropriate; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: Hop Brook is the largest tributary of the Sudbury River and drains more than half of the land area of Sudbury. Dozens of homes, recreational and historical areas, town wells, and Town property are along this waterway and associated ponds. Until the 1970s, Hop Brook was a major recreational and natural asset - with multiple locations for swimming, fishing, ice skating, and canoeing, and supported a diverse ecosystem with many species of birds and fish. Recorded Sudbury history features activities along Hop Brook since the 1700s, including fishing, saw and grain mills, canoeing, and swimming. However, nutrient pollution-primarily from the

Marlborough Easterly wastewater treatment plant has caused severe degradation of water quality, and overgrowth of invasive plants and toxic algae. As a result, the Hop Brook waterway and associated ponds have become very unpleasant in the summer, are no longer attractive for recreational use, and require increasingly intensive management to reduce unwanted plants.

The goal of this project is to continue restoring water quality in the Hop Brook watershed, and thus reclaim an important recreational and historical asset for all Sudbury citizens. The Hop Brook Protection Association has collected extensive data on sources and variations in pollutant levels throughout Hop Brook, and have collaborated extensively with scientists at the Organization for the Assabet, Sudbury and Concord Rivers (OARS) to better understand how these pollutants, especially phosphorus, created the current situation. OARS has completed an in- depth evaluation using this data.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 40. COMMUNITY PRESERVATION ACT FUND – PARKINSON**  
**FIELD DRIVEWAY DESIGN** *(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$100,000 for Open Space and Recreation purposes under the Community Preservation Act from FY25 CPA Estimated Annual Revenues and then from the CPA General Reserve Fund, if needed, for the purpose of advancing the design of the driveway and parking area improvements at Parkinson Field, including any incidental and related expenses; or act on anything relative thereto.

Submitted by the Community Preservation Committee. (Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: The Town of Sudbury seeks CPA funds to undertake the design, engineering, and permitting of the driveway access for Parkinson's Field located behind Ti-Sales in Sudbury Center.

As construction has begun for the Bruce Freeman Rail Trail, which includes access improvements for trail users immediately adjacent to Parkinson's Field, it became apparent that the existing single-lane driveway from Hudson Road into the fields site needed attention. The driveway access at Hudson Road is overgrown with trees and shrubs, which obscure existing signs and the entrance itself. The driveway is 300-feet long, and is a single lane (which is located within a 20-foot wide right-of-way). This allows only one car at a time to use the driveway since there are no turn-outs available and no sight distance for drivers entering the driveway from Hudson Road. This configuration requires drivers attempting to exit from the site using the existing driveway to back up in the event of oncoming traffic.

These requested funds will be used to hire the appropriate consultants to conduct a survey of the driveway access, determine the extent and type of wetlands (it has been suggested that there are wetlands located to the east of the driveway, not just west of the driveway), work with town staff to determine whether an 18-foot wide, two-lane driveway can be designed and engineered, permitted, and, eventually reconstructed. The Town will also seek additional funds through grants or funding awards as the project design is underway. This request is for funds that will allow completion of the design/permitting as envisioned.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee will report at Town Meeting.

**ARTICLE 41. COMMUNITY PRESERVATION ACT FUND –  
COMMUNITY GARDEN**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$40,000 for Open Space and Recreation purposes under of the Community Preservation Act from FY25 CPA Estimated Annual Revenue, and then from the CPA General Reserve Fund, if needed, for the purpose of the installation and equipping of an artesian irrigation well for a reliable water source to support local farming at Lincoln Meadows including demolition, site preparation and any other incidental and related costs; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: Lincoln Meadows, gifted to the Town in 1965, is a 33-acre parcel located on Lincoln Road directly next to Sudbury Valley Trustees' Round Hill. Lincoln Meadows currently supports a seventy-plot community garden, each plot being roughly 30' x 30'. This garden currently has a hand pump for irrigating crops. The dug well is about 20 to 40 feet deep. This well is highly dependent on precipitation and regularly runs dry, particularly in the heat of summer when crops need to be irrigated the most. The gardeners request every year, whether a reliable artesian well can be installed. They take great pride in the vegetables and flowers that they produce, bringing water in from their homes, when the well runs dry.

The funds sought would be for the installation of the well, electricity and a shed to house the well pump and electronics. A spigot would be installed for gardeners to either fill buckets or connect hoses to water their plots. Funds for electricity and maintenance of the well and shed will be collected as a portion of the community gardener's fees;

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 42. COMMUNITY PRESERVATION ACT FUND – REGIONAL HOUSING  
SERVICES OFFICE (RHSO) MEMBERSHIP FEE**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money not to exceed \$33,000 for Community Housing purposes under the Community Preservation Act, funded from FY25 CPA Estimated Annual Revenue and then from the CPA General Reserve Fund, if needed, for the purpose of supporting and creating community housing by funding of the Town's portion of the FY25 Regional Housing Services Office (RHSO) membership fee; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: In recent years, Sudbury has made great strides

towards satisfying the requirements of the State’s Comprehensive Permit Act (Chapter 40B). This Act requires cities and towns to provide certification that the number of dwelling units in the municipality which qualify as “affordable” by statute, meets or exceeds ten percent (10%) of the municipality’s total number of dwelling units. Falling short of that number, as Sudbury had in the past, allows developers to both site and design partially affordable developments with extreme limitations on the Town’s zoning and development requirements, and design oversights. There are a great number of administrative requirements to monitor and certify this approved inventory and to maintain those certifications going forward.

Since 2011, the Town has contracted with the Regional Housing Services Office (RHSO) to provide services to the Town including affordable housing inventory monitoring; supervising lotteries to determine who qualifies for affordable housing; monitoring the Incentive Senior Developments at Frost Farm and Grouse Hill to ensure compliance with eligibility requirements; monitoring all deed restricted properties; providing valuations for deed restricted properties to the Town Assessor; reviewing compliance with Regulatory Agreements and certification to the Executive Office of Housing and Livable Communities for Local Initiative Program (LIP) rental units; maintaining the affordable housing inventory and providing estimates for 2030 SHI projections; and other administrative work, including annual action plans, 5-year consolidated plans, fair housing reports and programs, and related housing questions which arise during the year. This Article requests funding to continue to contract with the RHSO for these services.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 43. COMMUNITY PRESERVATION ACT FUND –  
RETURN OF UNSPENT FUNDS**

*(Consent Calendar)*

To see if the Town will vote to return the unused funds from appropriations voted at prior Town Meetings for projects that have been completed and for which no liabilities remain outstanding or unpaid, into the Community Preservation Act Fund as follows:

|   |             |
|---|-------------|
| 2020 ATM, Article 45- Remediation of Water Chestnuts<br>from Hop Brook Pond System to be returned to the<br>category of Open Space and Recreation | \$28,051.12 |
| Total:  | \$28,051.12 |

;or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

COMMUNITY PRESERVATION COMMITTEE REPORT: This project is completed at this time or will not proceed further. In order to return the funds to the Community Preservation Act general account, an affirmative vote of Town Meeting on this article is necessary.

SELECT BOARD POSITION: The Select Board supports this article.

FINANCE COMMITTEE REPORT: The Finance Committee recommends approval of this article.

**ARTICLE 44. COMMUNITY PRESERVATION ACT FUND –**  
**GENERAL BUDGET AND APPROPRIATIONS**

*(Consent Calendar)*

To see if the Town will vote to appropriate a sum or sums of money from Community Preservation Act Funds, as recommended by the Community Preservation Committee, for the FY25 Community Preservation Act budget, including the administrative expenses and all other necessary and proper expenses of the Community Preservation Committee for FY25, amounts for payment of debt service on the Community Preservation Act projects previously appropriated by Town Meeting, and as may be needed to comply with General Laws Chapter 44B, Section 6 to reserve for future appropriation, amounts for open space, including land for recreational use, historic resources, and community housing; or act on anything relative thereto.

Submitted by the Community Preservation Committee.

(Majority vote required)

**COMMUNITY PRESERVATION COMMITTEE REPORT:** This article sets forth the entire FY2025 Community Preservation Act budget, including appropriations and reservations as required in connection with the administration of the Community Preservation Act funds. The estimated annual revenue for FY2025 is \$2,925,000. The article appropriates funds for FY2025 debt service obligations totaling \$750,193. These obligations arise from prior Town Meeting approval for the bonding of four projects:

- 1) Purchase of the Libby property utilizing the Open Space and Recreation (\$117,300) category;
- 2) Purchase of development rights on the Nobscot Boy Scout Reservation Phases I and II utilizing the Open Space and Recreation (\$379,275) category;
- 3) Purchase of development rights on Pantry Brook Farm utilizing the Open Space and Recreation (\$185,993) category; and
- 4) Purchase of the Johnson Farm Property utilizing the Open Space and Recreation (\$67,625) category;

The article also appropriates funds for administrative and operational expenses of the Community Preservation Committee in the amount of \$114,500. The administrative fund can be used by the Community Preservation Committee to pay for technical staffing and expertise, consulting services (e.g. land surveys and engineering), property appraisals, legal advertisements, publication fees, and other administrative expenses. By statute, the Community Preservation Committee may budget up to five percent (5%) of its annual budget for these administrative and operational expenses, or \$146,000 based upon the projected FY2025 revenue of \$2,925,000. Any funds remaining in the administrative account at the fiscal year's end revert to the Community Preservation Act Fund Balance, and need to be re-appropriated for administrative use in subsequent years. The Community Preservation Committee believes having access to administrative funds is critically important as it allows the Committee to conduct business on a time-sensitive basis, a vital component of the Community Preservation Act.

The Community Preservation Act requires 10% of the estimated annual income be allocated to current projects or reserved for future expenditures in each of the three core categories: Community Housing, Historic Resources, and Open Space and Recreation. The actual amount reserved each year depends upon whether or not Town Meeting has appropriated money totaling less than 10%, or not appropriated any money at all in any of these three core categories. If there is a balance of unspent Community Preservation Act funds from that fiscal year after such reservations and after Town Meeting has voted the Community Preservation Act articles, it is budgeted in the unrestricted reserve account for future Community Preservation Act projects in all three categories.

**SELECT BOARD POSITION:** The Select Board supports this article.

**FINANCE COMMITTEE REPORT:** The Finance Committee recommends approval of this article.

**ARTICLE 45. AMEND GENERAL BYLAWS, CHAPTER 20, BY ADDING “DISABILITY”**

To see if the Town will vote to amend General Bylaws Section 20-4 by adding the word “disability” to the list of conditions in the definition of discriminatory, discriminate, or discrimination.

Submitted by Petition.

(Majority vote required)

PETITIONER’S REPORT: When we commit to anti-discrimination we must not forget people with disabilities. At the October 2023 Special Town Meeting, the Town voted to approve as amended Article 2 CODIFICATION OF GENERAL BYLAWS: ADDITIONAL SPECIFIC CHANGES. Among the changes was the addition of Chapter 20, Equal Opportunity, Section 20-4, definition of "discriminatory, discriminate, or discrimination.”.

The list of conditions in the definition omitted the term “disability.” The Massachusetts Commission Against Discrimination lists 13 protected conditions — the 12 specified in Section 20-4, plus “disability.”

The petitioners ask that “disability” be added, as shown underlined below, so that the bylaw reads:  
Chapter 20, Equal Opportunity, Section 20-4, definition of "discriminatory, discriminate, or discrimination": Includes all action which denies or tends to deny equal employment opportunity because of race, color, age, disability, religious creed, national origin, sex, gender identity, sexual orientation, which shall not include persons whose sexual orientation involves minor children as the sex object, genetic information, pregnancy or a condition related to said pregnancy, including, but not limited to, lactation or the need to express breast milk for a nursing child, ancestry or status as a veteran (as defined by state statutes).

We can remedy an omission and include people with disabilities by voting “yes” on Article 44.

SELECT BOARD POSITION: The Select Board will report at Town Meeting.

**TOWN COUNSEL OPINIONS**

It is the opinion of Town Counsel that, if the Zoning Bylaw amendments proposed in the following articles in the Warrant for the 2024 Annual Town Meeting are properly moved, seconded and adopted by a two-thirds vote in favor of the motion or in the case of Articles 33 and 34, by a majority vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Zoning Bylaw:

- Article 16. Amend Zoning Bylaw, Article IX, Sections 2200 and 7000, Firearms Safety Business Use
- Article 31. Amend Zoning Bylaw, Codification – Additional Changes
- Article 32. Amend Zoning Bylaw, Article IX, Section 6300 Site Plan Review
- Article 33. Amend Zoning Bylaw, Article IX, Insert Section 4700C, Multi-Family Overlay District
- Article 34. Amend Zoning Bylaw, Article IX, Section 5600, Inclusion of Affordable Housing

It is the opinion of Town Counsel that, if the Bylaw amendments proposed in the following article in the Warrant for the 2024 Annual Town Meeting are properly moved, seconded and adopted by a majority vote in favor of the motion, the proposed changes will become valid amendments to the Sudbury Bylaw:

- Article 29. Amend General Bylaw, Article XV, Building Permit Fees
- Article 30. Amend General Bylaw, Article XXII, Conservation Commission Permit Fees

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And you are required to serve this Warrant by posting an attested copy thereof at the Town Hall at least seven days before the time appointed for such meeting.

Hereof fail not and make due return of the Warrant by your doing thereon to the Town Clerk, at or before the time of meeting aforesaid.

Given under our hands this 2<sup>nd</sup> day of April, 2024.

SELECT BOARD OF SUDBURY:

Janie W. Dretler

Lisa V. Kouchakdjian

Daniel E. Carty

Jennifer S. Roberts

Charles G. Russo

Part II

**FINANCE SECTION**

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NOTE: If you have suggestions for the Finance Committee (“FinCom”) section of the warrant, please send your suggestions to [FinCom@sudbury.ma.us](mailto:FinCom@sudbury.ma.us).

Please use the following link to the Finance Committee section of the Town’s website for additional information: <https://sudbury.ma.us/financecommittee/>.

# Finance Committee Budget Report

The Finance Committee (“FinCom”) provides its Budget Report and accompanying information to assist residents in understanding Sudbury’s budget for fiscal year 2025 (“FY25,” the period from July 1, 2024 to June 30, 2025) and the related financial articles that will be presented at Town Meeting.

The mission of the FinCom is to make recommendations to Town Meeting on the annual budget and any other finance-related warrant articles. To achieve this mission, FinCom reviews and considers any matter that may have a long- or short-term fiscal impact on the Town and communicates with other Town Boards, the Town Manager, the Finance Director, the Superintendents of Sudbury Public Schools (“SPS”) and Lincoln-Sudbury Regional High School (“LSRHS”), and others as needed for the purpose of gathering information for evaluation, debate, and the formulation of a recommendation.

FinCom is an independent volunteer body appointed by the Town Moderator. The numbers contained in this document are based on FinCom’s or the Finance Director’s calculations as of March 20, 2024, unless otherwise noted, and in certain cases are approximations to explain the budget concisely. We provide links to detailed budgets for each cost center in the respective sections of this report. Please refer to the actual warrant articles that will be voted for exact amounts.

## Summary and Recommendations

**Operating Budget.** There are three cost centers that make up the majority of the Operating Budget (Article 3): SPS; LSRHS; and the Town Departments.

FinCom worked collaboratively with the three cost centers to analyze their budgets in detail, in particular examining those line items that are most material or that generate budget pressure.

FinCom recommends approval of the FY25 Operating Budget, for the reasons set forth below.

**Capital Budget.** The Town presents a Capital Budget of \$5,039,247, consisting of:

- The Town Manager’s Capital Budget (Article 4), in the amount of \$628,697;
- Nine Warrant Articles totaling \$2,060,550; and
- One Warrant Article seeking in-levy debt for the Atkinson Pool project in the amount of \$2,350,000.

FinCom recommends approval of all of these Capital articles.

**Community Preservation Act (“CPA”) Fund Articles.** FinCom has reviewed the ten CPA Fund Articles and recommends approval of all, with the exception of Article 40 (Parkinson Field Driveway Design), on which it will report at Town Meeting.

## Town Operating Budget

The Town of Sudbury’s Operating Budget for Town Departments, including Employee Benefits and OPEB contributions attributable to the Town and excluding debt payments, will increase by 4.38% over the Fiscal Year 2024 (FY24) budget.

| Item                              | YoY Change (\$)  | YoY Change (%) |
|-----------------------------------|------------------|----------------|
| General Government                | \$219,071        | 6.09%          |
| Public Safety                     | \$459,497        | 4.62%          |
| Public Works                      | \$259,154        | 4.24%          |
| Human Services                    | \$28,869         | 2.88%          |
| Culture and Recreation            | \$77,256         | 4.71%          |
| Town-Wide Operating and Transfers | \$5,314          | 2.71%          |
| Reserve Fund                      | \$0              | 0.00%          |
| Employee Benefits                 | \$259,765        | 3.77%          |
| OPEB Contribution                 | \$0              | 0.00%          |
| <b>TOTAL INCREASE</b>             | <b>1,308,926</b> | <b>4.38%</b>   |

FinCom makes the following observations with respect to the Town Operating Budget:

- The Town Departments deserve credit for their efforts to maintain services with a limited budget.
- There remains little room in the budget for anything new; once again, we have no new headcount and no new initiatives.
- FinCom is concerned that the Town (1) has identified needs that remain unmet and (2) faces fixed costs that are rising higher than revenue, creating the possibility that we will not be able to meet future departmental needs with the current budget.

- Many of the Town’s collective bargaining agreements expire at the end of FY24, creating some uncertainty about FY25 expenses.
- The Town Manager is completing his evaluation of our fiscal situation as he enters his second year with us, and we look forward to working with him to address these challenges.

The FY25 Preliminary Town Budget can be found at: <https://sudbury.ma.us/finance/wp-content/uploads/sites/292/2024/02/FY25-TM-Proposed-Budget-2-1-2024.pdf?version=0b85df7a7d871e4a53d9aac3883b0fe9>

## Sudbury Public Schools Operating Budget

The SPS operating budget, including Employee Benefits and OPEB contributions attributable to SPS and excluding debt, will increase by \$1,924,160, or 3.59% from the FY24 budget. (The increase is 3.22% over the FY24 budget – the Town’s guidance to SPS – when Employee Benefits and OPEB are not included.)

FinCom makes the following observations with respect to the SPS operating budget:

- In FY24, it was clear that there was overwhelming support from the community to adequately fund additional academic and social, emotional, and mental health support for SPS students. In keeping with this philosophy, the FY25 budget supports, and increases, the resources that were contemplated in the FY24 override budget.
- SPS continues to make concerted efforts to take a right-sized approach to its budget, balancing students’ needs while utilizing all available funding options.
- FinCom noted the significant increase in paraprofessional positions added over the last two years to support student needs arising from Covid and will continue to monitor this line item.
- FinCom is concerned that SPS is forecasting a need for a budget increase in FY26, currently modeled at 3.72%, that is higher than what we expect the operating budget in FY26 to support. While these are only preliminary numbers, we will need to monitor this potential budget pressure.
- While the requested base budget is fully funded for FY25, there remain Tier 1 and Tier 2 initiatives that are not supported and represent clear and present needs.
- Some FinCom members raised concerns about SPS’ long-term energy strategy and the development of solar resources using school property.

The SPS FY25 Budget Book may be accessed at: <https://www.sudbury.k12.ma.us/Page/887>

## Lincoln Sudbury Regional High School Operating Budget

Sudbury's contribution to the LSRHS operating budget, including Employee Benefits and contributions to the LSRHS OPEB Fund and excluding debt payments, will increase by \$578,975, or 2.03%. (The total LSRHS budget will increase by 3.4% over the FY24 budget.) Sudbury's assessment decreased by 0.13% to 87.31% of the total LSRHS budget versus the prior year.

FinCom makes the following observations with respect to the LS Operating Budget:

- Reflects a final appropriation below the total budget guidance provided by Sudbury, yet maintains current service levels and programs.
- Not taking on new recurring operating expenses that may be cost prohibitive in future years to address anticipated decreased enrollment in upcoming years.
- Has managed its budget such that the end of Covid funding will have no budget repercussions.
- Absorbs an increase in Out-Of-District special education expenses through prudent planning and significant use of special education circuit breaker reimbursements.
- A review of the LS solar contract demonstrates that the district continues to realize utility cost savings from preferential pricing locked-in by the long-term agreement.
- Further enrollment declines are expected over the next several years, and the impact of those declines on student services and programs must be monitored.

More detailed information about the FY24 LS budget may be accessed online at <https://drive.google.com/file/d/1RILw2q2aLSW9PZnH1kF1fGe5PaFObcrF/view>.

## Debt Service

The Town's debt service will increase by 76.10% in FY25 to a total of \$4,897,465. The key drivers of the increase are debt obligations approved in prior years for Fairbank, Fire Station #2, Stearns Mill Dam/Dutton Road Bridge, Town-wide drainage, and CSX land acquisition.

## Town Capital Budget

Capital spending in the Town supports everything from DPW equipment to HVAC units, public safety equipment, Town facilities, and buildings. Capital is presented in the Town Manager's Capital Operating Budget (Article 4), which includes items that cost \$100,000 or less, and in individual warrant articles for projects exceeding \$100,000.

There are several sources of funding for capital. Three are being recommended to fund capital requests at this year's Annual Town Meeting:

Tax Levy: the revenue a community can raise through real and personal property taxes. Typically, the tax levy is the funding source for the Town Manager's Capital Operating Budget, as well as a portion of debt service. This year in addition to the Town Manager's Capital Operating Budget, the tax levy is recommended as the source of funding for the Town Wide Culvert Replacement, DPW Salt Storage Vinyl Cover Replacement, and DPW Roof-Top HVAC Unit Replacements, and as funding for the debt payments for the Atkinson Pool Renovations.

Free Cash: the unencumbered fund balance in the General Fund at the end of a fiscal year. The free cash available at the Annual Town Meeting is \$2,508,130. A portion of the \$4,317,363 certified Free Cash was encumbered by vote at the fall Special Town Meeting. Free Cash is recommended to fund the Pick-Up Truck with Plow, 2 Swap Body Trucks with Plow and Various Bodies, Exterior Stairwell Masonry at LSRHS, Analog Lighting Control Panel Replacement at LS, and Haynes Elementary Dehumidification.

CPC Funds: the result of a tax surcharge residents pay of 3% beyond the levy, and a portion of matching funds from the State that varies from year to year. Each year, at least 10% of CPA funds must be spent or set aside for each of the following categories: open space and recreation, community housing, and historic preservation. CPC may also designate 5% for administrative costs. The CPC is projected to collect an estimated \$2.93 million in FY25 from CPC surcharge revenues, the State match, and interest. Of this, \$116,250 is requested for administration. After paying current debt service of \$750,193, for past purchases such as Cutting and Dickson, Libby, Nobscot, Pantry Brook and Johnson Farm, this leaves about \$2.03 million for new projects out of FY25 revenue.

CPC has recommended the following capital projects be funded or partially funded with CPA funds: the Wayside Inn Bridge, Bruce Freeman Rail Trail – Phase 3, Parkinson Field Driveway Design, and Community Garden.

### **Town Manager's Capital Operating Budget**

For FY25, the Town Manager's Capital Operating Budget, which appears in Article 4, totals \$628,697, a nearly \$100,000 decrease from FY24. Over the past few years fewer and fewer capital projects can be included in the Town Manager's Capital Budget due to increased prices, and FinCom recommends that the threshold for this Budget be reconsidered. Having reviewed and agreed with the need for and amount of each item in the Town Manager's Capital Budget, FinCom recommends approval.

### **Additional Capital Warrant Articles**

The FinCom has reviewed each of the additional capital warrant articles, relying on materials submitted by the proponents, information received at hearings, and the reports of the CIAC and, where applicable, the CPC. FinCom agrees with the need for and amount of each of these items and recommends approval of each Article (with the exception of Article 40, Parkinson Field Driveway Design, on which it will report at Town Meeting). FinCom also commends the Town for bringing more capital spending within the tax levy, in line with advice received from the state.

## **Your Property Tax Bill**

Under the FY25 proposed budget, the estimated tax increase for an average residential property in Sudbury (assessed at \$1,082,016 as of FY24) would be \$543, or 3.44% year over year, consisting of

- \$385, attributed to the FY25 operating budget increase
- \$243, attributed to previously approved debt exclusions
- (\$15), attributed to the FY25 Town Manager's capital budget decrease
- (\$153), attributed to the reduction in capital exclusions
- (\$60), attributed to contributions to stabilization funds
- \$143, attributed to FY25 capital articles

These increases do not account for the CPA 3% surcharge.

## Conclusion

The FinCom commends the Town, SPS, and LSRHS for their thoughtful budget efforts and their cooperation with the FinCom's work. As noted above, we remain concerned about pressures on our Operating Budget, particularly with regard to the Town's inability to fund necessary staff positions that were identified several years ago, the rise of fixed costs in relation to revenue, and the unfunded Tier 1 and Tier 2 initiatives of SPS. We also note concern about pressures on our Capital Budget, with several large projects (including the school roofs) anticipated in upcoming years. We look forward to the Town Manager's assessment of these pressures and working with him and his team to address them going forward.

Respectfully submitted,

Susan Berry

Andrew Bettinelli

Maura Carty

Michael Ferrari

Michael Joachim (Co-Chair)

Ryan Lynch

Eric Poch (Co-Chair)

Henry Sorett

LeYi (Colin) Wang

## Town Meeting Warrant Data Summary

## ARTICLES WITH FINANCE COMMITTEE RECOMMENDATIONS

| <u>Article</u> | <u>Description</u>  | <u>Requested Amount</u> | <u>Finance Committee Recommendation</u> |
|----------------|---|-------------------------|---|
| 3              | FY25 Budget   | 121,605,022             | Approval                                |
| 4              | FY25 Capital Budget   | 713,697                 | Approval                                |
| 5              | FY25 Transfer Station Enterprise Fund Budget  | 329,869                 | Approval                                |
| 6              | FY25 Pool Enterprise Fund Budget  | 537,783                 | Approval                                |
| 7              | FY25 Recreation Field Maintenance Enterprise Fund Budget  | 243,663                 | Approval                                |
| 8              | FY23 Snow & Ice Transfer  | TBD                     | Report at Town Meeting                  |
| 9              | Unpaid Bills  | TBD                     | Report at Town Meeting                  |
| 10             | Chapter 90 Highway Funding  | N/A                     | Approval                                |
| 11             | Stabilization Fund  | 201,507                 | Approval                                |
| 12             | FY25 Revolving Fund Spending Limits   | N/A                     | Approval                                |
| 13             | Capital Stabilization Fund  | 250,000                 | Approval                                |
| 14             | Revoke Opioid Settlement Stabilization Fund   | N/A                     | Approval                                |
| 15             | Means Tested Senior Tax Exemption Extension   | N/A                     | Approval                                |
| 16             | Amend Zoning Bylaw: Firearms Safety Business Use  | N/A                     | Report at Town Meeting                  |
| 17             | Acquisition of MBTA Buildings   | TBD                     | Approval                                |
| 18             | Swap Body Trucks w/Plow & Various Bodies - 2 of same vehicle                                    | 560,000                 | Approval                                |
| 19             | Pickup Truck with Plow  | 120,000                 | Approval                                |
| 20             | Town Wide Culvert and Drainage Reconstruction   | 625,000                 | Approval                                |
| 21             | DPW Roof Top HVAC Unit Replacements   | 200,000                 | Approval                                |
| 22             | DPW Salt Shed Vinyl Cover Replacement   | 125,000                 | Approval                                |
| 23             | Atkinson Pool Renovation  | 2,350,000               | Approval                                |
| 24             | SPS - School Classroom Instructional Equipment Replacement                                      | 100,000                 | Approval                                |
| 25             | SPS - Haynes Elementary School Dehumidification HVAC  | 150,000                 | Approval                                |
| 26             | LSRHS Lighting Control Replacement  | 144,585                 | Approval                                |
| 27             | LSRHS Exterior Stairwell Replacement  | 130,965                 | Approval                                |
| 28             | Electric Vehicle Charging Station - Goodnow Library   | 80,000                  | Report at Town Meeting                  |
| 29             | Amend General Bylaws, Art. XXII, Conservation Commission Fees                                   | N/A                     | Approval                                |
| 33             | Amend Zoning Bylaw Article IX: Insert Section 4700C Multi-Family Overlay District (MBTA Zoning) | N/A                     | Report at Town Meeting                  |
| 34             | Amend Zoning Bylaw Article IX: Insert Section 5600 Inclusion of Affordable Housing              | N/A                     | Report at Town Meeting                  |
| 35             | Community Preservation Act Fund - Wayside Inn Road Bridge Reconstruction                        | 400,000                 | Approval                                |
| 36             | Community Preservation Act Fund - Bruce Freeman Rail Trail Phase 3                              | 600,000                 | Approval                                |
| 37             | Community Preservation Act Fund - Sudbury Housing Authority Allocation                          | 450,000                 | Approval                                |
| 38             | Community Preservation Act Fund - Sudbury Housing Trust Allocation                              | 380,000                 | Approval                                |
| 39             | Community Preservation Act Fund - Remediation of Water Chestnuts from Hop Brook Pond System     | 56,221                  | Approval                                |
| 40             | Community Preservation Act Fund - Parkinson Field Driveway Design                               | 100,000                 | Report at Town Meeting                  |
| 41             | Community Preservation Act Fund - Community Garden  | 40,000                  | Approval                                |
| 42             | Community Preservation Act Fund - Regional Housing Services Office (RHSO) Membership Fee        | 33,000                  | Approval                                |
| 43             | Community Preservation Act Fund - Return of Unspent Funds                                       | N/A                     | Approval                                |
| 44             | Community Preservation Act Fund - General Budget and Appropriations                             | 864,693                 | Approval                                |

# ESTIMATED IMPACT ON FY25 RESIDENTIAL TAX BILL

| ESTIMATED IMPACT OF TOWN MEETING SPENDING ON YOUR FISCAL 2025 TAX BILL                   |              |              |              |                                      |              |
|--|--------------|--------------|--------------|--------------------------------------|--------------|
|  |              |              |              | FY24<br>Average<br>Property<br>Value |              |
| Property Value   | 100,000      | 300,000      | 500,000      | 1,082,016                            | 1,200,000    |
| <b>FY24 Residential Tax Bill</b>   | 1,461        | 4,383        | 7,305        | 15,808                               | 17,532       |
| <b>FY25 Articles - Estimated Tax Impact:</b>   |              |              |              |                                      |              |
| 3    FY25 Budget:  |              |              |              |                                      |              |
| Operating Budget   | 36           | 107          | 178          | 385                                  | 427          |
| Debt Exclusions  | 22           | 67           | 112          | 243                                  | 269          |
| 4    FY25 Capital Budget   | (1)          | (4)          | (7)          | (15)                                 | (17)         |
| Capital Exclusions   | (14)         | (43)         | (71)         | (153)                                | (170)        |
| 11   Stabilization Fund  | (2)          | (6)          | (10)         | (22)                                 | (24)         |
| 13   Capital Stabilization Fund  | (3)          | (10)         | (17)         | (38)                                 | (42)         |
| 20   Town Wide Culvert and<br>Drainage Reconstruction                                    | 9            | 26           | 43           | 94                                   | 104          |
| 21   DPW Roof Top HVAC Unit<br>Replacements  | 2            | 5            | 9            | 19                                   | 21           |
| 22   DPW Salt Shed Vinyl Cover<br>Replacement  | 3            | 8            | 14           | 30                                   | 33           |
| <b>FY24 Estimated Residential Tax Bill</b>   | 1,511        | 4,534        | 7,556        | 16,352                               | 18,135       |
| <b>FY24 Estimated Increase (%)</b>   | <b>3.44%</b> | <b>3.44%</b> | <b>3.44%</b> | <b>3.44%</b>                         | <b>3.44%</b> |
| <b>THESE AMOUNTS ARE ESTIMATES AND MAY NOT CORRESPOND WITH THE FINAL FY25 TAX BILLS.</b> |              |              |              |                                      |              |

Notes:

This chart shows the estimated tax impact of Town Meeting Articles. The columns shown above represent the FY24 average home value along with other valuations for reference.

This chart pertains to articles for which approval is sought at Town Meeting to raise required funds via tax levy or appropriation from available funds.

To calculate the estimated tax bill for any specific residence, divide the assessed value of the residence by 100,000 and multiply that ratio by the tax impact in the column for \$100,000 residence value.

## HOW THE RESIDENTIAL TAX RATE IS CALCULATED

The property tax levy is the revenue a community can raise through real and personal property taxes. Property tax is an assessment on the ownership of real and personal property. An owner's property tax is based on the Town's assessment, which is the full and fair cash value of the property.

Proposition 2 ½ places constraints on the amount of the levy raised by a city or town and on how much the levy can be increased from year to year. A levy limit is a restriction on the amount of property taxes a community can levy. A levy limit for each community is calculated annually by the Department of Revenue. It is important to note that a community's levy limit is based on the previous year's levy limit and not on the previous year's actual levy.

Each year, a community's levy limit automatically increases by 2.5 percent over the previous year's levy limit. This does not require any action on the part of local officials; the Department of Revenue calculates this increase automatically. Additionally, a community can increase its levy limit each year to reflect new growth in the tax base. Assessors are required to submit information on growth in the tax base for approval by the Department of Revenue as part of the tax rate setting process.

A community can temporarily or permanently increase the levy limit by approving debt exclusions, capital exclusions, and overrides. Debt exclusions raise the levy limit for the life of the bonds that are issued, capital exclusions raise the levy limit one time, and overrides permanently increase the levy limit.

The Tax Rate is calculated by dividing the total levy to be raised (real estate taxes) by the total value of the property assessment, multiplied by 1,000. Real Estate taxes are determined by dividing the value of a home by 1,000 and multiplying by the tax rate. The following shows a sample calculation:

---

**Sample Tax Rate Calculation**

|                                |                    |
|--------------------------------|--------------------|
| Real Estate Taxes to Be Raised | 95,014,000         |
| Assessed Value (Town-Wide)     | 6,503,347,774      |
| Tax Levy/Assessed Value        | <u>0.014610014</u> |
| Tax Rate                       | 14.61              |

**Individual Tax Calculation Example**

|                  |                                     |
|------------------|-------------------------------------|
| Home Value       | 1,082,016.00                        |
| Home Value/1,000 | 1,082.02                            |
| Real Estate Tax  | <u>15,808.27</u> = (14.61*1,082.02) |

# GENERAL FUND BUDGET SUMMARY OF REVENUES & EXPENDITURES

| <b>EXPENDITURES</b>                      | <b>FY23<br/>Actual</b> | <b>FY24<br/>Budgeted</b> | <b>FY25<br/>Recommended</b> |
|--|------------------------|--------------------------|-----------------------------|
| Education - Sudbury Public Schools (SPS) | 41,748,483             | 44,358,543               | 45,785,871                  |
| Education - LS Regional High School (LS) | 27,869,763             | 28,936,600               | 29,497,481                  |
| Education - Vocational                   | 343,462                | 500,000                  | 450,000                     |
| General Government                       | 3,287,790              | 3,598,455                | 3,817,526                   |
| Public Safety                            | 9,507,572              | 9,939,791                | 10,399,288                  |
| Public Works                             | 6,155,006              | 6,111,600                | 6,370,754                   |
| Human Services                           | 948,036                | 1,002,310                | 1,031,179                   |
| Culture & Recreation                     | 1,527,400              | 1,639,483                | 1,716,739                   |
| <b>Total Town Departments</b>            | <b>91,387,513</b>      | <b>96,086,782</b>        | <b>99,068,838</b>           |
| Reserve Fund                             | -                      | 300,000                  | 300,000                     |
| Town-Wide Operating and Transfers        | 759,929                | 195,991                  | 201,305                     |
| Town Debt Service                        | 2,176,160              | 2,781,145                | 4,897,465                   |
| Employee Benefits (Town and SPS)         | 14,476,744             | 15,730,817               | 16,487,414                  |
| OPEB Trust Contribution (Town and SPS)   | 650,000                | 650,000                  | 650,000                     |
| <b>Total Operating Budget</b>            | <b>109,450,346</b>     | <b>115,744,735</b>       | <b>121,605,022</b>          |
| Town Manager's Capital Operating Article | 585,047                | 728,525                  | 628,697                     |
| Capital Expenditures - Other Articles    | 2,223,701              | 3,466,652                | 2,060,550                   |
| <b>Total Capital Expenditures</b>        | <b>2,808,748</b>       | <b>4,195,177</b>         | <b>2,689,247</b>            |
| <b>TOTAL EXPENDITURES:</b>               | <b>112,259,094</b>     | <b>119,939,912</b>       | <b>124,294,269</b>          |

| <b>REVENUES &amp; AVAILABLE FUNDS</b>        | <b>FY23<br/>Actual</b> | <b>FY24<br/>Budgeted</b> | <b>FY25<br/>Recommended</b> |
|--|------------------------|--------------------------|-----------------------------|
| Real Estate and Personal Property Taxes      | 98,495,687             | 102,907,420              | 109,151,952                 |
| State Aid                                    | 6,952,173              | 7,101,143                | 7,201,622                   |
| MEDICAID Reimbursements                      | 98,251                 | 150,000                  | 98,251                      |
| Local Receipts                               | 7,445,594              | 5,590,000                | 5,907,000                   |
| Other Available                              | 744,373                | 724,697                  | 824,894                     |
| Free Cash                                    | -                      | 3,466,652                | 1,110,550                   |
| <b>TOTAL REVENUES &amp; AVAILABLE FUNDS:</b> | <b>113,736,077</b>     | <b>119,939,912</b>       | <b>124,294,269</b>          |

| <b>FUND BALANCE</b>                     | <b>FY23<br/>Actual</b> | <b>FY24<br/>Budgeted</b> | <b>FY25<br/>Recommended</b> |
|---|------------------------|--------------------------|-----------------------------|
| Beginning Fund Balance                  | 6,178,428              | 7,655,411                | 4,188,759                   |
| Revenues (Increase to Fund Balance)     | 113,736,077            | 116,473,260              | 123,183,719                 |
| Expenditures (Decrease to Fund Balance) | (112,259,094)          | (119,939,912)            | (124,294,269)               |
| <b>ENDING FUND BALANCE:</b>             | <b>7,655,411</b>       | <b>4,188,759</b>         | <b>3,078,209</b>            |

## OPERATING BUDGET DETAIL

| DEPARTMENT                      | FY22<br>Actuals | FY23<br>Actuals | FY24<br>Budgeted | FY25<br>Requested | FTEs<br>FY22 | FTEs<br>Current |
|---------------------------------|-----------------|-----------------|------------------|-------------------|--------------|-----------------|
| <b>GENERAL GOVERNMENT</b>       |                 |                 |                  |                   |              |                 |
| Select Board/Town Manager       | 450,676         | 613,270         | 518,137          | 536,011           | 4.0          | 4.0             |
| ATM/HR                          | 227,123         | 170,466         | 247,859          | 268,304           | 2.0          | 2.0             |
| Law                             | 223,711         | 198,890         | 208,310          | 260,374           | 1.0          | 1.0             |
| Finance Committee               | 1,757           | -               | 4,959            | 4,959             | -            | -               |
| Accounting                      | 367,835         | 338,082         | 406,938          | 420,524           | 4.0          | 4.0             |
| Assessors                       | 262,216         | 263,376         | 312,662          | 322,916           | 3.0          | 3.0             |
| Treasurer/Collector             | 317,481         | 309,281         | 362,234          | 373,036           | 4.0          | 4.0             |
| Information Systems             | 539,913         | 566,158         | 611,420          | 640,895           | 2.0          | 3.0             |
| Town Clerk & Registrars         | 307,569         | 349,816         | 344,548          | 376,746           | 4.0          | 4.0             |
| Conservation                    | 139,447         | 154,658         | 234,082          | 238,116           | 2.0          | 3.0             |
| Planning & Board of Appeals     | 331,964         | 257,148         | 347,306          | 375,645           | 4.0          | 4.0             |
| <b>PUBLIC SAFETY</b>            |                 |                 |                  |                   |              |                 |
| Police                          | 4,351,865       | 4,434,938       | 4,593,261        | 4,699,841         | 41.0         | 41.0            |
| Fire                            | 4,697,015       | 4,800,138       | 5,032,821        | 5,362,017         | 43.0         | 43.0            |
| Building Department             | 271,823         | 266,234         | 313,709          | 337,429           | 4.0          | 4.0             |
| <b>PUBLIC WORKS</b>             |                 |                 |                  |                   |              |                 |
| Engineering                     | 535,141         | 594,812         | 623,734          | 642,452           | 5.0          | 5.0             |
| Streets & Roads                 | 2,393,916       | 2,463,798       | 2,822,803        | 2,864,097         | 17.0         | 17.0            |
| Snow & Ice                      | 680,897         | 905,679         | 424,750          | 450,000           | -            | -               |
| Trees and Cemetery              | 455,324         | 439,489         | 491,099          | 497,096           | 5.0          | 5.0             |
| Parks and Grounds               | 304,426         | 251,964         | 299,795          | 306,477           | 2.0          | 2.0             |
| Combined Facilities             | 1,234,741       | 1,316,237       | 1,449,419        | 1,610,631         | 5.0          | 6.0             |
| <b>HUMAN SERVICES</b>           |                 |                 |                  |                   |              |                 |
| Health Department               | 557,336         | 539,315         | 555,620          | 571,087           | 5.0          | 5.0             |
| Senior Center                   | 343,680         | 356,937         | 386,289          | 399,231           | 5.0          | 5.0             |
| Veterans Affairs                | 54,544          | 44,221          | 60,401           | 60,861            | 1.0          | 1.0             |
| <b>CULTURE &amp; RECREATION</b> |                 |                 |                  |                   |              |                 |
| Goodnow Library                 | 1,264,644       | 1,289,709       | 1,375,940        | 1,441,323         | 14.0         | 14.0            |
| Recreation                      | 211,693         | 223,836         | 236,194          | 262,720           | 4.0          | 4.0             |
| Historical Commission           | 6,432           | 7,129           | 8,500            | 8,589             | -            | -               |
| Historic Districts Commission   | 3,457           | 3,473           | 3,849            | 4,107             | -            | -               |

## CAPITAL BUDGET

| Project Name                                      | Department  | Cost                | Suggested Funding |
|---|---|---------------------|-------------------|
| Town Wide Walkway Design & Construction           | DPW   | \$ 50,000           | Tax Levy          |
| Four Post Heavy Duty Lift                         | DPW   | \$ 65,000           | Tax Levy          |
| DPW Truck Bay Concrete Floor Replacement - Design | Facilities  | \$ 98,000           | Tax Levy          |
| Firearms Simulator                                | Police  | \$ 69,500           | Tax Levy          |
| Replace WiFi Network                              | LSRHS   | \$ 71,197           | Tax Levy          |
| Schools Carpet Replacement                        | SPS   | \$ 75,000           | Tax Levy          |
| Schools VCT Flooring Replacement                  | SPS   | \$ 75,000           | Tax Levy          |
| Schools Painting                                  | SPS   | \$ 50,000           | Tax Levy          |
| Paging, Clocks and Bells Systems                  | SPS   | \$ 25,000           | Tax Levy          |
| School Door Repairs and Replacement               | SPS   | \$ 50,000           | Tax Levy          |
|   | <b>Total</b>  | <b>\$ 628,697</b>   |                   |
| Pick-Up Truck with Plow                           | DPW   | \$ 125,000          | Free Cash         |
| Swap Body Truck with Plow and Various Bodies      | DPW   | \$ 280,000          | Free Cash         |
| Swap Body Truck with Plow and Various Bodies      | DPW   | \$ 280,000          | Free Cash         |
| Town Wide Culvert Replacement                     | DPW   | \$ 625,000          | Tax Levy          |
| DPW Salt Storage Vinyl Cover Replacement          | Facilities  | \$ 125,000          | Tax Levy          |
| DPW Roof-Top HVAC Unit Replacements               | Facilities  | \$ 200,000          | Tax Levy          |
| Exterior Stairwell Masonry                        | LSRHS   | \$ 130,965          | Free Cash         |
| Analog Lighting Control Panel Replacement         | LSRHS   | \$ 144,585          | Free Cash         |
| Haynes Elementary Dehumidification                | SPS   | \$ 150,000          | Free Cash         |
|   | <b>Free Cash Capital Additions in Excess of \$100,000</b> | <b>\$ 2,060,550</b> |                   |
| Atkinson Pool Renovations                         | Facilities  | \$ 2,350,000        | Debt              |
|   | <b>Total FY24 Capital Plan</b>                            | <b>\$ 5,039,247</b> |                   |

## ENTERPRISE FUNDS BUDGETS

| <b>EXPENDITURES</b>                | <b>FY23<br/>Actual</b> | <b>FY24<br/>Budgeted</b> | <b>FY25<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|------------------------------------|------------------------|--------------------------|-----------------------------|--------------------------------|
| <u>Direct</u>                      |                        |                          |                             |                                |
| Transfer Station                   | 247,325                | 310,648                  | 312,318                     | 0.54%                          |
| Atkinson Pool                      | 277,189                | 482,280                  | 492,783                     | 2.18%                          |
| Recreation Field Maintenance       | 214,250                | 213,514                  | 215,663                     | 1.01%                          |
| <b>Total Direct Expenditures</b>   | <b>738,764</b>         | <b>1,006,442</b>         | <b>1,020,764</b>            | <b>1.42%</b>                   |
| <u>Indirect</u>                    |                        |                          |                             |                                |
| Transfer Station                   | 17,551                 | 17,551                   | 17,551                      | 0.00%                          |
| Atkinson Pool                      | 40,733                 | 45,000                   | 45,000                      | 0.00%                          |
| Recreation Field Maintenance       | 26,089                 | 28,000                   | 28,000                      | 0.00%                          |
| <b>Total Indirect Expenditures</b> | <b>84,373</b>          | <b>90,551</b>            | <b>90,551</b>               | <b>0.00%</b>                   |
| <b>TOTAL:</b>                      | <b>823,137</b>         | <b>1,096,993</b>         | <b>1,111,315</b>            | <b>1.31%</b>                   |

| <b>RECEIPTS &amp; RESERVES</b> | <b>FY23<br/>Actual</b> | <b>FY24<br/>Budgeted</b> | <b>FY25<br/>Recommended</b> | <b>Percentage<br/>Increase</b> |
|--------------------------------|------------------------|--------------------------|-----------------------------|--------------------------------|
| Transfer Station               | 216,689                | 328,199                  | 329,869                     | 0.51%                          |
| Atkinson Pool                  | 403,328                | 527,280                  | 537,783                     | 1.99%                          |
| Recreation Field Maintenance   | 216,689                | 241,514                  | 243,663                     | 0.89%                          |
| <b>TOTAL:</b>                  | <b>836,706</b>         | <b>1,096,993</b>         | <b>1,111,315</b>            | <b>1.31%</b>                   |

## CPA FUNDS BUDGET

|                            | <b>FY23</b>       | <b>FY24</b>         | <b>FY25</b>        |
|----------------------------|-------------------|---------------------|--------------------|
|                            | <b>Actual</b>     | <b>Appropriated</b> | <b>Recommended</b> |
| Beginning CPA Fund Balance | 8,358,812         | 10,426,578          | 9,345,027          |
| <b>Revenues</b>            |                   |                     |                    |
| CPA Surcharge & Fees       | 2,381,114         | 2,200,000           | 2,300,000          |
| Intergovernmental          | 948,629           | 700,000             | 575,000            |
| Investment Income          | 104,964           | 20,000              | 50,000             |
| Total Revenues             | <u>3,434,707</u>  | <u>2,920,000</u>    | <u>2,925,000</u>   |
| <b>Expenditures</b>        |                   |                     |                    |
| Debt Service               | 1,017,893         | 990,643             | 750,193            |
| Administrative             | 39,045            | 114,500             | 114,500            |
| Other                      | 310,004           | 2,896,407           | 2,059,221          |
| Total Expenditures         | <u>1,366,941</u>  | <u>4,001,550</u>    | <u>2,923,914</u>   |
| Excess / (Deficiency)      | 2,067,766         | (1,081,550)         | 1,086              |
| Ending CPA Fund Balance    | <u>10,426,578</u> | <u>9,345,027</u>    | <u>9,346,113</u>   |
|                            | <b>FY23</b>       | <b>FY24</b>         | <b>FY25</b>        |
|                            | <b>Actual</b>     | <b>Appropriated</b> | <b>Recommended</b> |
| <b>ENDING FUND BALANCE</b> |                   |                     |                    |
| Projects (in-use)          | 2,965,231         | 2,965,231           | 2,937,180          |
| Unassigned                 | 7,461,346         | 6,379,796           | 6,408,933          |
|                            | <u>10,426,578</u> | <u>9,345,027</u>    | <u>9,346,113</u>   |

# LONG-TERM DEBT BY PROJECT

|  | Current Long-Term Debt (issued prior to 4/1/2024) |           |                |              |            |                 |                  |               |           |                    |                           |                      |                             |                    |            |
|--|---|-----------|----------------|--------------|------------|-----------------|------------------|---------------|-----------|--------------------|---------------------------|----------------------|-----------------------------|--------------------|------------|
|  | Nixon Roof and Other                              | ESCO Loan | Police Station | Johnson Farm | Broadacres | DPW Fuel Island | Stearns Mill Dam | Camp Sewataro | MCWT-CWMP | Dutton Road Bridge | Fairbank Community Center | CSX Land Acquisition | Fire Station # 2 Renovation | Town-Wide Drainage | Total      |
| Principal Balance as of 6/30/2024      | 40,000  | 518,086   | 3,840,000      | 935,000      | 2,940,000  | 940,000         | 270,000          | 9,385,000     | 475,000   | 430,000            | 27,390,000                | 745,000              | 3,060,000                   | 3,155,000          | 54,123,086 |
| Remaining Debt Service as of 6/30/2024 | 42,000  | 566,600   | 4,538,694      | 1,107,231    | 3,379,780  | 1,038,200       | 286,200          | 11,027,722    | 546,250   | 611,982            | 44,225,052                | 941,242              | 4,403,456                   | 4,540,247          | 77,254,657 |
| Payment 2025                           | 42,000  | 86,000    | 478,138        | 114,963      | 237,998    | 164,650         | 145,800          | 743,362       | 32,125    | 44,032             | 2,109,252                 | 111,042              | 289,456                     | 298,647            | 4,897,465  |
| Payment 2026                           | -   | 89,200    | 460,388        | 110,713      | 230,997    | 159,250         | 140,400          | 731,763       | 31,750    | 43,050             | 2,078,400                 | 107,800              | 283,600                     | 292,600            | 4,759,910  |
| Payment 2027                           | -   | 92,600    | 449,738        | 108,163      | 223,998    | 153,850         | -                | 720,162       | 31,375    | 41,800             | 2,031,150                 | 104,050              | 275,850                     | 284,600            | 4,517,335  |
| Payment 2028                           | -   | 96,000    | 439,088        | 105,613      | 216,997    | 148,450         | -                | 703,563       | 31,000    | 40,550             | 1,983,900                 | 100,300              | 268,100                     | 276,600            | 4,410,160  |
| Payment 2029                           | -   | 99,600    | 433,438        | 103,063      | 209,998    | 143,050         | -                | 687,062       | 30,625    | 39,300             | 1,936,650                 | 96,550               | 260,350                     | 268,600            | 4,308,285  |
| Payment 2030                           | -   | 103,200   | 422,638        | 100,513      | 202,997    | 137,650         | -                | 675,763       | 30,250    | 38,050             | 1,889,400                 | 92,800               | 252,600                     | 260,600            | 4,206,460  |
| Payment 2031                           | -   | -         | 411,838        | 97,963       | 201,248    | 131,300         | -                | 664,912       | 29,875    | 31,800             | 1,842,150                 | 89,050               | 244,850                     | 252,600            | 3,997,585  |
| Payment 2032                           | -   | -         | 376,038        | 95,413       | 199,497    | -               | -                | 654,063       | 29,500    | 30,800             | 1,794,900                 | 85,300               | 237,100                     | 244,600            | 3,747,210  |
| Payment 2033                           | -   | -         | 365,988        | 92,863       | 197,398    | -               | -                | 645,590       | 29,125    | 29,800             | 1,747,650                 | 81,550               | 229,350                     | 236,600            | 3,655,913  |
| Payment 2034                           | -   | -         | 355,938        | 90,313       | 195,297    | -               | -                | 636,582       | 28,750    | 28,800             | 1,700,400                 | 72,800               | 221,600                     | 228,600            | 3,559,079  |
| Payment 2035                           | -   | -         | 345,469        | 87,656       | 187,935    | -               | -                | 627,017       | 28,375    | 28,000             | 1,662,600                 | -                    | 215,400                     | 222,200            | 3,404,652  |
| Payment 2036                           | -   | -         | -              | -            | 185,640    | -               | -                | 616,918       | 28,000    | 27,200             | 1,624,800                 | -                    | 209,200                     | 210,800            | 2,902,558  |
| Payment 2037                           | -   | -         | -              | -            | 183,090    | -               | -                | 606,260       | 27,625    | 26,400             | 1,587,000                 | -                    | 198,000                     | 204,600            | 2,832,975  |
| Payment 2038                           | -   | -         | -              | -            | 180,540    | -               | -                | 595,335       | 27,250    | 25,600             | 1,549,200                 | -                    | 192,000                     | 198,400            | 2,768,325  |
| Payment 2039                           | -   | -         | -              | -            | 177,990    | -               | -                | 584,410       | 26,875    | 24,800             | 1,511,400                 | -                    | 186,000                     | 192,200            | 2,703,675  |
| Payment 2040                           | -   | -         | -              | -            | 175,440    | -               | -                | 573,218       | 26,500    | 24,000             | 1,473,600                 | -                    | 180,000                     | 186,000            | 2,638,758  |
| Payment 2041                           | -   | -         | -              | -            | 172,720    | -               | -                | 561,742       | 26,125    | 23,200             | 1,435,800                 | -                    | 174,000                     | 179,800            | 2,573,387  |
| Payment 2042                           | -   | -         | -              | -            | -          | -               | -                | -             | 25,750    | 22,400             | 1,398,000                 | -                    | 168,000                     | 173,600            | 1,787,750  |
| Payment 2043                           | -   | -         | -              | -            | -          | -               | -                | -             | 25,375    | 21,600             | 1,360,200                 | -                    | 162,000                     | 167,400            | 1,736,575  |
| Payment 2044                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | 20,800             | 1,322,400                 | -                    | 156,000                     | 161,200            | 1,660,400  |
| Payment 2045                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,284,600                 | -                    | -                           | -                  | 1,284,600  |
| Payment 2046                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,246,800                 | -                    | -                           | -                  | 1,246,800  |
| Payment 2047                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,209,000                 | -                    | -                           | -                  | 1,209,000  |
| Payment 2048                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,171,200                 | -                    | -                           | -                  | 1,171,200  |
| Payment 2049                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,133,400                 | -                    | -                           | -                  | 1,133,400  |
| Payment 2050                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,095,600                 | -                    | -                           | -                  | 1,095,600  |
| Payment 2051                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,052,800                 | -                    | -                           | -                  | -          |
| Payment 2052                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 1,015,200                 | -                    | -                           | -                  | -          |
| Payment 2053                           | -   | -         | -              | -            | -          | -               | -                | -             | -         | -                  | 977,600                   | -                    | -                           | -                  | -          |

*LS Regional High School Outstanding Debt*

|                           | Total     | Annual<br>Debt Service | Principal<br>Remaining |
|---------------------------|-----------|------------------------|------------------------|
| FY24 Principal<br>Balance |           |                        | 980,000                |
| FY25 Principal            | 495,000   |                        |                        |
| FY25 Interest             | 21,975    | 516,975                | 485,000                |
| FY26 Principal            | 485,000   |                        |                        |
| FY26 Interest             | 7,275     | 492,275                | -                      |
| Remaining Debt<br>Service | 1,546,150 | 1,546,150              |                        |

NOTE: All of LSRHS' long-term debt is for construction of the high school.

*Community Preservation Outstanding Debt by Project*

| Issues                    | Nobscot<br>I & II | Libby   | Pantry<br>Brook | Johnson<br>Farm | Total     | Annual<br>Debt<br>Service | Principal<br>Balance |
|---------------------------|-------------------|---------|-----------------|-----------------|-----------|---------------------------|----------------------|
| FY24 Principal<br>Balance | 1,825,000         | 115,000 | 1,700,000       | 550,000         |           |                           | 4,190,000            |
| FY25 Principal            | 330,000           | 115,000 | 155,000         | 50,000          | 650,000   |                           |                      |
| FY25 Interest             | 49,275            | 2,300   | 30,993          | 17,625          | 100,193   | 750,193                   | 3,540,000            |
| FY26 Principal            | 340,000           | -       | 160,000         | 50,000          | 550,000   |                           |                      |
| FY26 Interest             | 35,975            | -       | 27,843          | 15,125          | 78,943    | 628,943                   | 2,990,000            |
| FY27 Principal            | 330,000           | -       | 160,000         | 50,000          | 540,000   |                           |                      |
| FY27 Interest             | 24,875            | -       | 24,643          | 13,625          | 63,143    | 603,143                   | 2,450,000            |
| FY28 Principal            | 325,000           | -       | 165,000         | 50,000          | 540,000   |                           |                      |
| FY28 Interest             | 16,525            | -       | 21,393          | 12,125          | 50,043    | 590,043                   | 1,910,000            |
| FY29 Principal            | 320,000           | -       | 170,000         | 50,000          | 540,000   |                           |                      |
| FY29 Interest             | 7,988             | -       | 18,043          | 10,625          | 36,655    | 576,655                   | 1,370,000            |
| FY30 Principal            | 90,000            | -       | 170,000         | 50,000          | 310,000   |                           |                      |
| FY30 Interest             | 1,800             | -       | 14,643          | 9,125           | 25,568    | 335,568                   | 1,060,000            |
| FY31 Principal            | 90,000            | -       | 175,000         | 50,000          | 315,000   |                           |                      |
| FY31 Interest             | 900               | -       | 11,193          | 7,625           | 19,718    | 334,718                   | 745,000              |
| FY32 Principal            | -                 | -       | 180,000         | 50,000          | 230,000   |                           |                      |
| FY32 Interest             | -                 | -       | 7,643           | 6,125           | 13,768    | 243,768                   | 515,000              |
| FY33 Principal            | -                 | -       | 180,000         | 50,000          | 230,000   |                           |                      |
| FY33 Interest             | -                 | -       | 4,448           | 4,625           | 9,073     | 239,073                   | 285,000              |
| FY34 Principal            | -                 | -       | 185,000         | 50,000          | 235,000   |                           |                      |
| FY34 Interest             | -                 | -       | 1,526           | 3,125           | 4,651     | 239,651                   | 50,000               |
| FY35 Principal            | -                 | -       | -               | 50,000          | 50,000    |                           |                      |
| FY35 Interest             | -                 | -       | -               | 1,563           | 1,563     | 51,563                    | -                    |
| Remaining Debt<br>Service | 1,962,338         | 117,300 | 1,862,364       | 651,313         | 4,593,314 | 4,593,314                 |                      |

## Historical Context:

### REVENUE BY SOURCE (FY2016 – FY2025)

| <b>Fiscal Year</b> | <b>Tax Levy</b> | <b>State Aid</b> | <b>Local Receipts</b> | <b>All Other</b> | <b>Enterprise &amp; CPA Funds</b> | <b>Total</b> |
|--------------------|-----------------|------------------|-----------------------|------------------|-----------------------------------|--------------|
| 2016               | 76,997,530      | 7,541,780        | 4,787,000             | 8,181,145        | 3,278,774                         | 100,786,229  |
| 2017               | 79,892,487      | 7,777,348        | 4,545,000             | 1,810,337        | 3,352,567                         | 97,377,739   |
| 2018               | 83,323,444      | 8,001,490        | 4,625,001             | 4,102,709        | 3,478,742                         | 103,531,386  |
| 2019               | 86,384,635      | 8,061,320        | 4,836,800             | 2,718,203        | 5,075,819                         | 107,076,777  |
| 2020               | 89,733,894      | 8,226,761        | 4,763,556             | 2,019,894        | 3,091,795                         | 107,835,900  |
| 2021               | 92,444,615      | 8,247,852        | 4,493,415             | 3,631,954        | 3,423,880                         | 112,241,716  |
| 2022               | 95,995,345      | 6,745,983        | 4,685,088             | 5,327,572        | 3,554,025                         | 116,308,013  |
| 2023               | 99,049,389      | 7,019,516        | 5,324,259             | 5,570,494        | 3,606,913                         | 120,570,570  |
| 2024               | 105,189,118     | 7,393,557        | 5,300,000             | 6,598,916        | 5,099,148                         | 129,580,739  |
| 2025 (Estimate)    | 109,504,795     | 7,201,622        | 6,005,251             | 1,935,444        | 4,035,229                         | 128,682,341  |

Source: Sudbury Finance Department

## ASSESSED VALUES BY PROPERTY CLASS (FY2015 – FY2024)

| Fiscal Year | Residential   | Commercial  | Industrial | Personal Property | Total         | Residential % of Total | CIP* % of Total |
|-------------|---------------|-------------|------------|-------------------|---------------|------------------------|-----------------|
| 2015        | 3,825,857,903 | 147,618,442 | 51,552,200 | 63,887,360        | 4,088,915,905 | 93.57%                 | 6.43%           |
| 2016        | 3,953,667,699 | 153,832,208 | 52,641,600 | 70,742,800        | 4,230,884,307 | 93.45%                 | 6.55%           |
| 2017        | 4,128,077,415 | 161,710,160 | 28,896,800 | 90,269,320        | 4,408,953,695 | 93.63%                 | 6.37%           |
| 2018        | 4,252,412,677 | 172,317,688 | 29,891,300 | 106,053,550       | 4,560,675,215 | 93.24%                 | 6.76%           |
| 2019        | 4,396,808,625 | 189,613,218 | 30,823,000 | 111,118,740       | 4,728,363,583 | 92.99%                 | 7.01%           |
| 2020        | 4,451,809,500 | 179,424,076 | 30,823,000 | 111,016,580       | 4,773,073,156 | 93.27%                 | 6.73%           |
| 2021        | 4,476,309,078 | 193,733,270 | 32,737,300 | 109,526,080       | 4,812,305,728 | 93.02%                 | 6.98%           |
| 2022        | 4,804,601,288 | 215,023,558 | 34,203,500 | 144,636,520       | 5,198,464,866 | 92.42%                 | 7.58%           |
| 2023        | 5,708,346,257 | 269,234,148 | 38,246,300 | 155,200,260       | 6,171,026,965 | 92.50%                 | 7.50%           |
| 2024        | 6,528,068,698 | 268,293,396 | 39,102,700 | 173,473,820       | 7,008,938,614 | 93.14%                 | 6.86%           |

\* Commercial, Industrial, Personal Property

Source: Massachusetts Department of Revenue, Division of Local Services

## PROPERTY TAX RATES BY PROPERTY CLASS (FY2015 – FY2024)

| Fiscal Year                   | Residential | Commercial | Industrial |
|-------------------------------|-------------|------------|------------|
| (Tax Rates/\$1,000 Valuation) |             |            |            |
| 2013                          | 17.99       | 23.52      | 23.52      |
| 2014                          | 18.03       | 24.94      | 24.94      |
| 2015                          | 17.60       | 24.88      | 24.88      |
| 2016                          | 17.80       | 25.11      | 25.11      |
| 2017                          | 17.74       | 25.01      | 25.01      |
| 2018                          | 17.93       | 24.30      | 24.30      |
| 2019                          | 17.91       | 24.30      | 24.30      |
| 2020                          | 18.45       | 24.97      | 24.97      |
| 2021                          | 18.83       | 25.55      | 25.55      |
| 2022                          | 18.05       | 24.57      | 24.57      |
| 2023                          | 15.77       | 20.23      | 20.23      |
| 2024                          | 14.61       | 21.16      | 21.16      |

Source: Massachusetts Department of Revenue,  
Division of Local Services

## ESTIMATED RATE OF INCREASE OF RESIDENTIAL TAX RATE AS IT APPEARS ON AVERAGE RESIDENCE TAX BILL (FY2016 – FY2025)

| Fiscal Year     | Avg Single Family Home Value | Residential Tax Rate | YoY Change | Avg Single Family Tax Bill | YoY Change |
|-----------------|------------------------------|----------------------|------------|----------------------------|------------|
| 2016            | 678,738                      | 17.80                | 1.14%      | 12,082                     | 4.17%      |
| 2017            | 705,763                      | 17.74                | -0.34%     | 12,520                     | 3.63%      |
| 2018            | 726,906                      | 17.93                | 1.07%      | 13,033                     | 4.10%      |
| 2019            | 745,653                      | 17.91                | -0.11%     | 13,355                     | 2.46%      |
| 2020            | 746,260                      | 18.45                | 3.02%      | 13,768                     | 3.10%      |
| 2021            | 745,255                      | 18.83                | 2.06%      | 14,033                     | 1.92%      |
| 2022            | 801,629                      | 18.05                | -4.14%     | 14,469                     | 3.11%      |
| 2023            | 956,957                      | 15.77                | -12.63%    | 15,091                     | 4.30%      |
| 2024            | 1,082,016                    | 14.61                | -7.36%     | 15,808                     | 4.75%      |
| 2025 (Estimate) | 1,082,016                    | 15.11                | 3.44%      | 16,352                     | 3.44%      |

Source: Sudbury Finance Department

This chart shows the tax rate and the rate of increase of the tax bill of the average single-family residence by year.

## NEW GROWTH AND RATE OF INCREASE OF TOTAL TAX LEVY ADJUSTED FOR THE EFFECT OF NEW GROWTH (FY2016–FY2025)

| Fiscal Year     | Total Tax Levy | % Increase | New Growth | % Increase Net of New Growth |
|-----------------|----------------|------------|------------|------------------------------|
| 2016            | 76,997,530     | 4.69%      | 601,228    | 3.87%                        |
| 2017            | 79,892,487     | 3.76%      | 1,248,532  | 2.14%                        |
| 2018            | 83,323,444     | 4.29%      | 983,400    | 3.06%                        |
| 2019            | 86,384,635     | 3.67%      | 1,401,700  | 1.99%                        |
| 2020            | 89,733,894     | 3.88%      | 963,941    | 2.76%                        |
| 2021            | 92,444,615     | 3.02%      | 855,336    | 2.07%                        |
| 2022            | 95,995,345     | 3.84%      | 669,318    | 3.12%                        |
| 2023            | 99,049,389     | 3.18%      | 845,255    | 2.30%                        |
| 2024            | 105,189,118    | 6.20%      | 1,751,731  | 4.43%                        |
| 2025 (Estimate) | 109,504,795    | 4.10%      | 700,000    | 3.44%                        |

Source: Sudbury Finance Department

This chart shows the value of the new property value added each year and the rate of growth of the total tax levy by year.

## CPA FUND REVENUE (FY2016 – FY2025)

| Fiscal Year     | Local Surcharge | State Match Total | Total     |
|-----------------|-----------------|-------------------|-----------|
| 2016            | 1,756,562       | 534,729           | 2,291,291 |
| 2017            | 1,844,751       | 391,958           | 2,236,709 |
| 2018            | 1,961,810       | 342,975           | 2,304,785 |
| 2019            | 1,961,331       | 403,176           | 2,364,507 |
| 2020            | 2,085,432       | 525,058           | 2,610,490 |
| 2021            | 2,171,674       | 657,465           | 2,829,139 |
| 2022            | 2,240,178       | 1,055,262         | 3,295,440 |
| 2023            | 2,100,000       | 646,000           | 2,746,000 |
| 2024 (estimate) | 2,200,000       | 700,000           | 2,900,000 |
| 2025 (estimate) | 2,300,000       | 575,000           | 2,875,000 |

**NOTE:** Under the provisions of the Community Preservation Act (CPA), Sudbury established a Community Preservation Committee in 2002. The CPA Fund is annually supported by the Town plus a variable state match. The Town portion of the annual funding is calculated as a 3% CPA surcharge that is collected on all residential properties, except those whose owners take advantage of an exemption applied for in the Assessors' Office. The surcharge is applied to the assessed value of each property less \$100,000. The state portion of the annual funding comes from fees collected by the Registry of Deeds which is dedicated for the purpose of funding the state matching funds. The state portion varies year to year.

## Additional Information:

# COLLECTIVE BARGAINING

### **Bargaining Unit and Contract Financial Terms:**

#### **LS Regional High School**

The three-year agreement for the period covering FY23, FY24, and FY25 provides for COLA increases of 3%, 2%, 2%, respectively.

#### **Sudbury Public Schools, preK-8**

##### Teachers

Three-year contract covering FY23, FY24, and FY25 provides for COLA increases of 2% each year.

##### Support Staff

Three-year contract covering FY23, FY24, and FY25 provides for COLA increases of 2% each year.

##### Nurses

The next three-year contract covering FY23, FY24, and FY25 remains unsettled as of the printing of this document.

##### Custodians

Three-year contract covering FY23, FY24, and FY25 provides for COLA increases of 2% each year.

#### **Town**

##### Fire

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

##### Police – Patrol Officers

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

##### Police - Sergeants

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

Public Works

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

Engineering

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

Supervisory

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

Civilian Dispatchers

Three-year contract covering FY22, FY23, and FY24 provides for COLA increases of 0.5%, 2%, and 2%, respectively.

## BUDGET TERMS AND DEFINITIONS

**Abatements and Exemptions (previously called Overlay):** An amount set by the Assessors to create a fund to cover abatements of (and exemptions from) real and personal tax assessments for the current year and raised on the tax levy. An abatement is a reduction provided by the Assessors in the assessed tax because of bona fide specific conditions or situations not considered when the tax was levied. An exemption is provided for a variety of purposes, which include, but are not limited to buildings/property used for religious, government, charity, or pollution control. In addition, exemptions may also be provided to the elderly, handicapped, and veterans under certain conditions.

**Abatement Surplus:** Accumulation of the surplus amounts of Abatements and Exemptions set aside by the Assessors each year to cover abatements of (and exemptions from) real estate and personal property tax assessments. The accumulated amount for previous years no longer committed for abatements may be used by vote of the Town Meeting.

**Benefits and Insurance:** This account in the shared expenses section of the budget is comprised primarily of benefits such as health insurance and retirement for both school and general government employees.

**Capital Exclusion:** A temporary increase in the tax levy to fund a capital project or make a capital acquisition.

**Cherry Sheet:** An annual statement received from the Department of Revenue detailing estimated receipts for the next fiscal year from the various state aid accounts as well as estimated state and county government charges payable to the state. The name “Cherry Sheet” derives from the color of the paper used.

**Circuit Breaker Program:** School districts are eligible for reimbursements for students with disabilities whose programs cost greater than four times the statewide foundation budget. “Circuit Breaker” means the reimbursement program for certain costs of special education as specified in M.G.L. c. 71B, § 5.

**Debt Exclusion:** An override to Proposition 2 ½ for the purpose of raising funds for debt service costs; remains for the life of the debt only.

**Enterprise Fund:** A separate fund, set up to provide a specific Town service, whereby all direct and indirect/overhead costs of providing the service are funded in total from user charges. An appropriation for an enterprise fund is funded in total from enterprise fund revenue unless otherwise noted. Enterprise fund revenue used to fund services provided by other Town departments will be shown in the warrant after the appropriation total for the department. An enterprise fund is required to fully disclose all costs and all revenue sources needed to provide a service.

**Free Cash:** Free cash is the available, undesignated fund balance of the general fund and is generated when actual revenue collections are more than estimates, when expenditures are less than appropriated, or both. A free cash balance is certified as of July 1 each year by the Department of Revenue and once certified, any or all of the certified amount may be used to defray Town expenses by a vote of the Town Meeting.

**Funding Sources for Expenditures:** Authorizations for the Town to expend monies are made in the form of a motion at Town Meeting. The wording of the motions will specify the funding source; that is, the place from where money is going to come or will be raised. When a motion reads, "to appropriate a sum of money" without a source being identified, that amount will be included in the tax calculation, whereby the total of all sums to be appropriated will be reduced by an estimate of local and state revenue. The balance needed will be provided by property taxes. When items in the warrant are offset or raised from available funds, those items will also appear as offsets in the determination of the tax rate.

**Levy Limit:** The maximum amount a community can levy in any given year.

**Local Receipts:** This is the third largest source of revenue for the Town after property taxes and Cherry Sheet receipts. While it is comprised of different items, the largest source is the auto excise tax.

**New Growth:** Proposition 2 ½ allows a community to increase its levy limit annually by an amount based upon the valuation of certain new construction and other growth in the tax base that is not the result of property revaluation. New growth becomes part of the levy limit and thus increases at the rate of 2.5% each year as the levy limit increases.

**Normal Cost (OPEB):** Normal cost represents the portion of the cost of projected benefits for active employees allocated to the current plan year.

**Override:** An override is passed by a majority vote at Town Meeting and at the ballot. There are three types of overrides: An Operating Override, which permanently increases the levy limit; a Debt Exclusion, which increases the levy limit only for the life of the debt; and a Capital Project Override, which increases the levy only for the year in which the project is undertaken.

**OPEB:** Post-employment benefits that an employee will begin to receive at the start of retirement. This does not include pension benefits paid to the retired employee. Other post-employment benefits that a retiree can be compensated for are life insurance premiums, healthcare premiums and deferred-compensation arrangements.

**Proposition 2½:** A Massachusetts General Law enacted in 1980 to limit property taxes.

**Revolving Fund:** Funds that may be used without appropriation and that are established for special uses. Recreation fees, for example, may be paid into a revolving fund. Revolving funds are established by state law or Town bylaw.

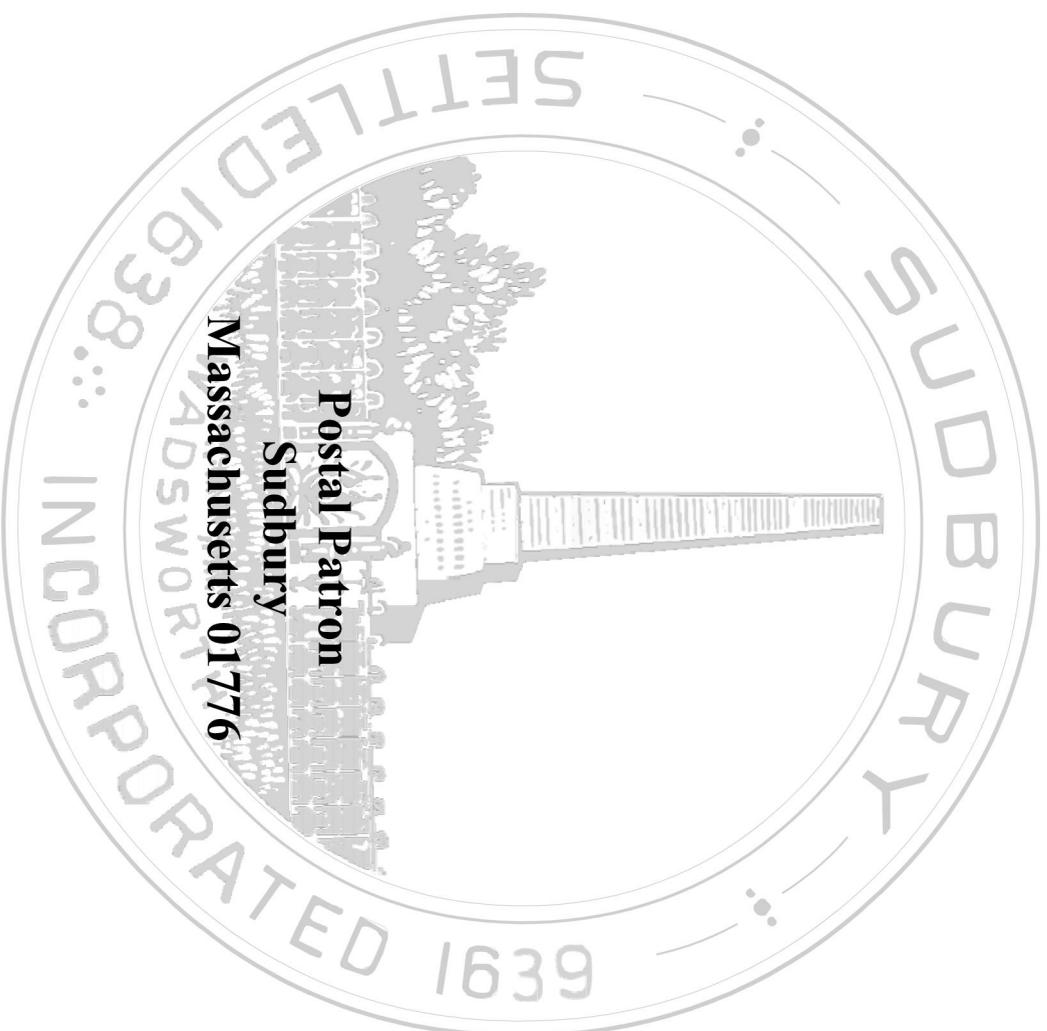
**Reserve Fund:** An amount appropriated by the Annual Town Meeting for emergency or unforeseen purposes. The Finance Committee, by state law, is the sole custodian of the Reserve Fund and approves transfers from the Fund into the operating budgets throughout the year if: (1) the need for funds is of an emergency and/or unforeseen nature, and (2) if, in the judgment of the Finance Committee, the Town Meeting would approve such an expenditure if such a meeting was held. The Reserve Fund is, therefore, a mechanism for avoiding the necessity of frequent Special Town Meetings.

**Stabilization Fund:** Similar to a "savings account", this account has been used to fund large capital projects such as fire trucks and school roofs. A recent amendment to state law allows the Stabilization Fund to be used for the operating budget, as well as capital purchases; however, the Finance Committee would be reluctant to recommend doing so. Placing money into, or taking it out of, the Stabilization Fund requires a two-thirds vote of Town Meeting.

**Tax Levy:** The property tax levy is the revenue a community can raise through real and personal property taxes. In Massachusetts, municipal revenues to support local spending for schools, public safety, general government, and other public services are raised through the property tax levy, state aid, local receipts, and other sources. The property tax levy is the largest source of revenue for most cities and towns.

**Town-wide Operating Expenses:** This account in the general government section of the budget is comprised primarily of operating expenses such as postage, telephone, and property liability insurance, that support town-wide operations and are not assigned to any one department or cost center.

Select Board  
Sudbury, MA 01776



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