

TAX RATE RECAPITULATION
Fiscal Year 2020

I. TAX RATE SUMMARY

la. Total amount to be raised (from page 2, IIe)	\$ 107,835,899.85
lb. Total estimated receipts and other revenue sources (from page 2, IIIe)	18,102,006.00
lc. Tax Levy (Ia minus Ib)	\$ 89,733,893.85
ld. Distribution of Tax Rates and levies	

CLASS	(b) Levy percentage (from LA5)	(c) lc above times each percent in col (b)	(d) Valuation by class (from LA-5)	(e) Tax Rates (c) / (d) x 1000	(f) Levy by class (d) x (e) / 1000
Residential	91.0587	81,710,517.20	4,451,809,500.00		
Net of Exempt			4,428,831,456.00	18.45	81,711,940.36
Open Space	0.0000	0.00	0.00	0.00	0.00
Commercial	4.9936	4,480,951.72	179,424,076.00	24.97	4,480,219.18
Net of Exempt					
Industrial	0.8579	769,827.08	30,823,000.00	24.97	769,650.31
SUBTOTAL	96.9102		4,662,056,576.00		86,961,809.85
Personal	3.0898	2,772,597.85	111,016,580.00	24.97	2,772,084.00
TOTAL	100.0000		4,773,073,156.00		89,733,893.85

MUST EQUAL 1C

Assessors

[Liam J Vesely, Board of Assessors , Sudbury , assessors@sudbury.ma.us 978-639-3393 | 12/12/2019 4:15 PM](#)

Comment:

[Trevor A. Haydon, Assessor , Sudbury , assessors@sudbury.ma.us 978-639-3393 | 12/11/2019 5:19 PM](#)

Comment:

Do Not Write Below This Line --- For Department of Revenue Use Only

Reviewed By: Amy Handfield
Date: 12/17/2019
Approved: Andrew Nelson
Director of Accounts: Mary Jane Handy

Mary Jane Handy

NOTE : The information was Approved on 12/17/2019

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II. Amounts to be raised

Ila. Appropriations (col.(b) through col.(g) from page 4)	<u>106,953,933.00</u>
Ilb. Other amounts to be raised	
1. Amounts certified for tax title purposes	<u>30,000.00</u>
2. Debt and interest charges not included on page 4	0.00
3. Final Awards	0.00
4. Total overlay deficit	0.00
5. Total cherry sheet offsets (see cherry sheet 1-ER)	29,292.00
6. Revenue deficits	0.00
7. Offset receipts deficits Ch. 44, Sec. 53E	0.00
8. CPA other unappropriated/unreserved	<u>790.00</u>
9. Snow and ice deficit Ch. 44, Sec. 31D	0.00
10. Other :	0.00
TOTAL Ilb (Total lines 1 through 10)	<u>60,082.00</u>
Ilc. State and county cherry sheet charges (C.S. 1-EC)	194,690.00
Ild. Allowance for abatements and exemptions (overlay)	627,194.85
Ile. Total amount to be raised (Total Ila through Ild)	<u>107,835,899.85</u>

III. Estimated receipts and other revenue sources

IIIa. Estimated receipts - State	
1. Cherry sheet estimated receipts (C.S. 1-ER Total)	6,620,995.00
2. Massachusetts school building authority payments	1,605,766.00
TOTAL IIIa	<u>8,226,761.00</u>
IIIb. Estimated receipts - Local	
1. Local receipts not allocated (page 3, col (b) Line 24)	<u>4,763,556.00</u>
2. Offset Receipts (Schedule A-1)	<u>0.00</u>
3. Enterprise Funds (Schedule A-2)	<u>972,795.00</u>
4. Community Preservation Funds (See Schedule A-4)	<u>2,119,000.00</u>
TOTAL IIIb	<u>7,855,351.00</u>
IIIc. Revenue sources appropriated for particular purposes	
1. Free cash (page 4, col (c))	<u>1,359,894.00</u>
2. Other available funds (page 4, col (d))	<u>660,000.00</u>
TOTAL IIIc	<u>2,019,894.00</u>
IIId. Other revenue sources appropriated specifically to reduce the tax rate	
1a. Free cash..appropriated on or before June 30, 2019	0.00
1b. Free cash..appropriated on or after July 1, 2019	0.00
2. Municipal light surplus	0.00
3. Other source :	0.00
TOTAL IIId	<u>0.00</u>
IIIe. Total estimated receipts and other revenue sources (Total IIIa through IIId)	<u>18,102,006.00</u>

IV. Summary of total amount to be raised and total receipts from all sources

a. Total amount to be raised (from Ile)	<u>107,835,899.85</u>
b. Total estimated receipts and other revenue sources (from IIIe)	<u>18,102,006.00</u>
c. Total real and personal property tax levy (from Ic)	<u>89,733,893.85</u>
d. Total receipts from all sources (total IVb plus IVc)	<u>107,835,899.85</u>

NOTE : The information was Approved on 12/17/2019

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LOCAL RECEIPTS NOT ALLOCATED *

	Receipt Type Description	(a) Actual Receipts Fiscal 2019	(b) Estimated Receipts Fiscal 2020
==>	1. MOTOR VEHICLE EXCISE	3,840,440.96	3,350,000.00
	2. OTHER EXCISE		
==>	a.Meals	287,931.07	200,000.00
==>	b.Room	132,749.53	122,200.00
==>	c.Other	2,238.40	0.00
==>	d.Cannabis	0.00	0.00
==>	3. PENALTIES AND INTEREST ON TAXES AND EXCISES	280,794.93	0.00
==>	4. PAYMENTS IN LIEU OF TAXES	61,536.91	60,000.00
	5. CHARGES FOR SERVICES - WATER	0.00	0.00
	6. CHARGES FOR SERVICES - SEWER	0.00	0.00
	7. CHARGES FOR SERVICES - HOSPITAL	0.00	0.00
	8. CHARGES FOR SERVICES - SOLID WASTE FEES	0.00	0.00
	9. OTHER CHARGES FOR SERVICES	0.00	0.00
	10. FEES	0.00	0.00
	a.Cannabis Impact Fee	0.00	0.00
	b.Community Impact Fee Short Term Rentals	0.00	0.00
	11. RENTALS	179,028.98	160,300.00
	12. DEPARTMENTAL REVENUE - SCHOOLS	75,234.65	0.00
	13. DEPARTMENTAL REVENUE - LIBRARIES	16,589.56	16,000.00
	14. DEPARTMENTAL REVENUE - CEMETERIES	0.00	0.00
	15. DEPARTMENTAL REVENUE - RECREATION	0.00	0.00
	16. OTHER DEPARTMENTAL REVENUE	8,567.98	8,000.00
	17. LICENSES AND PERMITS	1,155,012.83	817,804.00
	18. SPECIAL ASSESSMENTS	0.00	0.00
==>	19. FINES AND FORFEITS	19,827.94	0.00
==>	20. INVESTMENT INCOME	146,208.49	20,200.00
==>	21. MEDICAID REIMBURSEMENT	0.00	0.00
==>	22. MISCELLANEOUS RECURRING (UPLOAD REQUIRED)	0.00	9,052.00
==>	23. MISCELLANEOUS NON-RECURRING (UPLOAD REQUIRED)	143,401.43	0.00
	24. Totals	6,349,563.66	4,763,556.00

I hereby certify that the actual receipts as shown in column (a) are, to the best of my knowledge correct and complete, and I further certify that I have examined the entries made on page 4 of the Fiscal 2020 tax rate recapitulation form by the City, Town or District Clerk and hereby acknowledge that such entries correctly reflect the appropriations made and the sources from which such appropriations are to be met.

Accounting Officer

I hereby certify that the actual receipts as shown in column (a) are, to the best of my knowledge correct and complete, and I further certify that I have examined the entries made on page 4 of the above-indicated fiscal year tax rate recapitulation form by the City / Town / District Clerk and hereby acknowledge that such entries correctly reflect the appropriations made and the sources from which such appropriations are to be met.

Christine Nihan, Town Accountant , Sudbury , nihanc@sudbury.ma.us 978-639-3319 | 12/12/2019 12:44 PM

Comment:

* Do not include receipts in columns (a) or (b) that were voted by the City / Town / District Council or Town Meeting as offset receipts on Schedule A-1, enterprise funds on Schedule A-2, or departmental revolving funds per Chapter 44, Section 53E 1/2. Written documentation should be submitted to support increases / decreases of estimated receipts to actual receipts.

NOTE : The information was Approved on 12/17/2019

TAX RATE RECAPITULATION
Fiscal Year 2020

==> Written documentation should be submitted to support increases/ decreases of FY 2020 estimated receipts to FY 2019 estimated receipts to be used in calculating the Municipal Revenue Growth Factor (MRGF).

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TAX RATE RECAPITULATION
Fiscal Year 2020

APPROPRIATIONS										AUTHORIZATIONS	
										MEMO ONLY	
City/Town Council or Town Meeting Dates	FY*	(a) Total Appropriations Of Each Meeting	(b) ** From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)	(g) From Community Preservation Funds (See A-4)	(h) *** Departmental Revolving Funds	(i) Borrowing Authorization (Other)	
05/06/2019	2020	101,703,034.00	101,043,034.00	0.00	660,000.00	0.00	0.00	0.00	0.00	0.00	
05/06/2019	2020	545,000.00	545,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/06/2019	2020	295,432.00	0.00	0.00	0.00	0.00	295,432.00	0.00	0.00	0.00	
05/06/2019	2020	449,323.00	0.00	0.00	0.00	0.00	449,323.00	0.00	0.00	0.00	
05/06/2019	2020	228,040.00	0.00	0.00	0.00	0.00	228,040.00	0.00	0.00	0.00	
05/06/2019	2019	270,000.00	0.00	270,000.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/06/2019	2019	194,894.00	0.00	194,894.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/06/2019	2019	250,000.00	0.00	250,000.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/06/2019	2019	75,000.00	0.00	75,000.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/07/2019	2020	130,000.00	130,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/07/2019	2020	125,000.00	125,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/07/2019	2019	570,000.00	0.00	570,000.00	0.00	0.00	0.00	0.00	0.00	0.00	
05/07/2019	2020	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	500,000.00	
05/07/2019	2020	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	11,300,000.00	
05/07/2019	2020	235,000.00	0.00	0.00	0.00	0.00	0.00	235,000.00	0.00	0.00	
05/07/2019	2020	220,000.00	0.00	0.00	0.00	0.00	0.00	220,000.00	0.00	0.00	
05/07/2019	2020	30,000.00	0.00	0.00	0.00	0.00	0.00	30,000.00	0.00	0.00	
05/07/2019	2020	320,000.00	0.00	0.00	0.00	0.00	0.00	320,000.00	0.00	0.00	
05/07/2019	2020	25,000.00	0.00	0.00	0.00	0.00	0.00	25,000.00	0.00	0.00	
05/07/2019	2020	63,000.00	0.00	0.00	0.00	0.00	0.00	63,000.00	0.00	0.00	
05/07/2019	2020	1,225,210.00	0.00	0.00	0.00	0.00	0.00	1,225,210.00	0.00	0.00	
Total		106,953,933.00	101,843,034.00	1,359,894.00	660,000.00	0.00	972,795.00	2,118,210.00			

* Enter the fiscal year to which the appropriation relates, i.e., fiscal year 2019 or fiscal 2020.

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** Appropriations included in column (b) must not be reduced by local receipts or any other funding source.
Appropriations must be entered gross to avoid a duplication in the use of estimated or other sources of receipts.
*** Include only revolving funds pursuant to Chapter 44, Section 53 E 1/2.

Clerk

I hereby certify that the appropriations correctly reflect the votes taken by City / Town / District Council.

Beth R. Klein, Town Clerk , Sudbury , kleinb@sudbury.ma.us 978-639-3351 | 12/5/2019 3:27 PM

Comment:

NOTE : The information was Approved on 12/17/2019