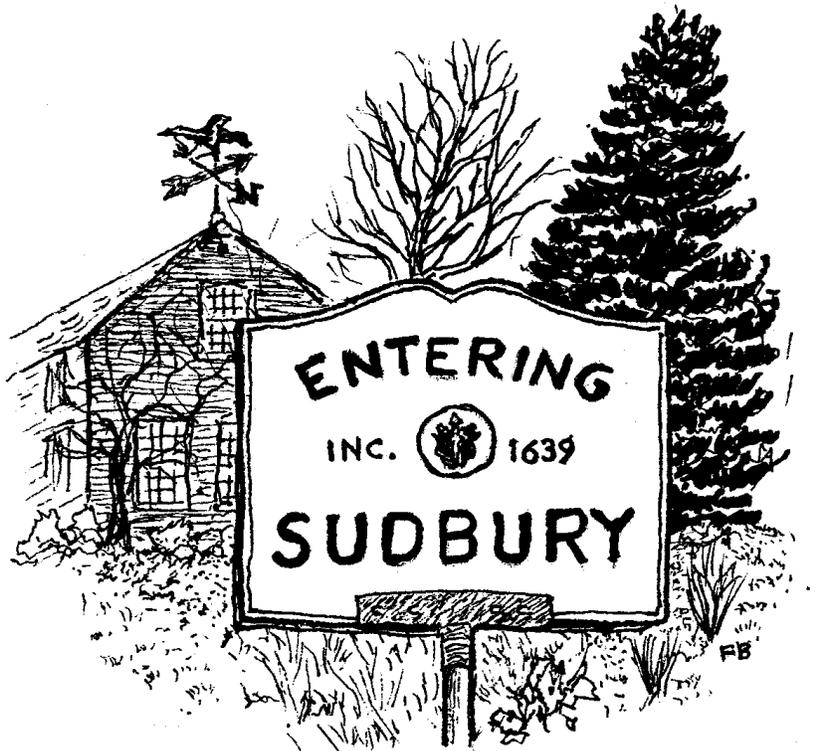


Town of Sudbury

Community Preservation Committee

Report

October 2002
Revised October 2009



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

I. Introduction

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

A residential property at the average assessed value (\$529,500 as of August 2009) pays \$197 per year to the CPA Fund. Residential properties are charged a 3% *surcharge* on their property taxes, appearing as a separate line item on your tax bill. Prior to the 3% calculation, every property receives an exemption of the first \$100,000 in assessed value. Any abatements you may have received are also reflected proportionally in your CPA charge. Low income homeowners, and low-to-moderate income senior homeowners are exempted entirely from the CPA surcharge. Commercial properties are also exempted.

Consistent with the requirements of the CPA and with a bylaw adopted at the 2002 Annual Town Meeting, the Community Preservation Committee (“CPC”) was formed to study the needs, possibilities and resources of the Town regarding community preservation. The CPC, appointed by the Selectmen, includes representatives of the Town’s Conservation Commission, Historical Commission, Planning Board, Park and Recreation Commission, Housing Authority, Finance Committee, Board of Selectmen, and two at-large citizen members.

After its formation, the CPC met to discuss its role as facilitators for community preservation in Sudbury. It interviewed other members of local CPC’s, including the Town of Bedford and the City of Newton, to help determine its role. As with both Bedford and Newton, the Sudbury CPC determined:

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

These guidelines have not changed in the committee’s seven years of existence. The CPC periodically conducts a review of existing Town studies. In determining the priorities for spending CPA funds, the CPC utilizes the goals from Town-wide reports and studies as the basis for its recommendations. The published goals from 2001 Master Plan, 2009-2013 Open Space and Recreation Plan, 2002 Land Use Priorities Committee Report, 2002 Town-wide Comprehensive Facility Study, and the 2005 Housing Plan have been condensed into this report. These goals form the basis for projects recommended by the CPC, as they have received wide public scrutiny and inspection. In addition, annual goals set by many boards contribute additional ideas to the list of potential projects eligible for CPA funding. While it is assumed that other projects unrelated to these goals will be submitted over time and, further, that these goals

may be amended over time as the needs of the Town change, consistency with the main Town goals as found in these reports and the goals of the boards and committees will receive preference.

Sudbury's Commitment to Community Preservation

It is not surprising that Sudbury adopted the Community Preservation Act. For many years the residents of Sudbury had been concerned with erosion of the Town's historic and rural character. Sudbury was in the forefront of the Land Bank legislation (the precursor to the CPA), passing it in 1997 before it was ratified by the legislature. In 2001 we had recently completed a lengthy strategic planning process culminating in the writing of a Master Plan, the first comprehensive planning document for Sudbury in over 35 years. We are constantly looking ahead, trying to shape the community's future, both through actions and words.

At the 1998 Annual Town Meeting, the following Character of Sudbury Statement was unanimously adopted as a resolution:

"We in Sudbury appreciate our town but are concerned about its future.

We value the town's essentially residential, low-density nature. A significant aspect of Sudbury's charm and character is derived from its rural/suburban feeling. Becoming more like towns nearer Boston would not be considered "progress." This is not to say that the value and convenience of consumer oriented, commercial activity and development is not appreciated. We remain open to positive change, while zealously safeguarding historical treasures and traditions. High value is placed upon Sudbury's natural resources and beauty, its open spaces, wetlands, forests and wildlife. The opportunities that these resources provide for enjoying and appreciating nature, recreation and escaping from our hectic lives is precious. Aligned with these natural resources is the diligent protection of the quality of Sudbury's water and air.

We feel that Sudbury's residential housing should be built in harmony with and in proportion to its surroundings and acreage. Encouragement of this harmony for all construction is highly recommended. Moderation in the rate of growth within the town is also desirable.

Sudbury's people are one of its most valued assets. Promoting a socioeconomic environment that permits and encourages a diversity of ethnicity, religion, age and income will perpetuate this important town value. We value the traditions and institutions that create a sense of community. However, to sustain our legacy of helping others and our spirit of volunteerism we need more involvement by citizens.

Maintenance of the quality of Sudbury's public services and recognition and appreciation of the people that provide them is essential to Sudbury's character. The high quality of Sudbury's public schools is particularly valued. We expect that public officials, working in conjunction with others, will keep the sense of Sudbury's character at the forefront in their decision making process. In such undertakings openness, fairness, proactivity and a view to preservation of Sudbury's character and to the common good will be highly valued by Sudbury's citizens."

II. Sudbury CPA Program: 2002-2009

Income

Locally, Sudbury has raised over \$1 million in each of the last seven years in local surcharges. In addition, we have received a 100% state match of our local collections for the fiscal years 2004-2008. The state match declined to roughly 70% in FY2009, and the FY10 allocation was 37.58%. The CPA fund balance also earns interest income on its unspent funds. Therefore the total revenue generated by the CPA in Sudbury since 2002 is over \$18.5 million, with over \$7 million of that coming from the state match.

Town of Sudbury Community Preservation Act Revenues

Fiscal Year	Tax Surcharge	State Match*	Subtotal	Interest Income	Total
2003	\$1,019,875		\$1,019,875	\$3,552	\$1,023,427
2004	\$1,085,238	\$1,030,840	\$2,116,078	\$13,753	\$2,129,831
2005	\$1,108,053	\$1,090,772	\$2,198,825	\$74,624	\$2,273,449
2006	\$1,235,961	\$1,105,972	\$2,341,933	\$222,218	\$2,564,151
2007	\$1,304,321	\$1,248,806	\$2,553,127	\$219,616	\$2,772,743
2008	\$1,355,512	\$1,307,615	\$2,663,127	\$297,203	\$2,960,330
2009	\$1,436,010	\$965,898	\$2,401,908	\$245,650	\$2,647,558
2010 (est)	\$1,400,000	\$539,676	\$1,939,676	\$250,000	\$2,189,676
Total	\$9,944,970	\$7,289,579	\$17,234,549	\$1,326,616	\$18,561,165

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

Expenditures

Generally, through FY09, Sudbury has spent 60% of its CPA revenues and “saved” the other 40%. Expenditures break down into:

	Total \$ spent	% of total	Project Statistics
			CPA \$ Collected
Open Space (mainly debt service)	\$4,851,544	26%	8 projects/386 acres
Community Housing	\$2,828,000	15%	7 projects/20 units
Recreation	\$2,197,253	12%	10 projects
Historic Preservation	\$1,378,017	7%	18 projects
TOTAL PROJECT EXPENDITURES	\$11,254,814	60%	

Projects

To date, Sudbury has approved 43 projects.

<u>PROJECT NAME</u>	<u>YEAR</u>	<u>DESCRIPTION</u>	<u>STATUS</u>	<u>CPA TOTAL</u>
Hosmer House Restoration	2002	Preservation and restoration of the historic Hosmer House and a survey of the property, including the electrical, plumbing and fire safety systems.	Completed	\$51,600
Sudbury Housing Authority New Development	2002	Funds to build 7 homes with 16 affordable rental units through Sudbury Housing Authority (\$320K of \$3.1 million total cost). Will bond for five years, with first year payment costing \$77K.	Project cancelled	\$320,000
Dickson Land Purchase	2003	Purchase of 2.39 acres for open space and historic preservation.	Completed	\$430,000
Cutting Athletic Field	2004	Purchase and construction of 4 acres for recreation field and parking.	Completed	\$600,000
Cutting Farm	2004	Purchase of development rights on Cutting Farm for recreation and open space.	Completed	\$4,700,000
Revolutionary War Cemetery	2004	Survey work and restoration of the Revolutionary War Cemetery.	Project in progress	\$172,350
Walkway Construction	2004	Engineering, design, and construction of walkways for recreational use.	Completed	\$100,000
Affordable Housing Buy-Down	2005	To buy down up to 5 condo units and make them affordable.	Completed	\$500,000
Bruce Freeman Rail Trail	2005	Feasibility study for a rail-trail project.	Completed	\$25,000
Cutting Athletic Field	2005	Development of the Cutting Athletic Fields.	Completed	\$80,250
Hosmer House Restoration	2005	Additional funding for preservation of the historic Hosmer House.	Project in progress	\$198,900
Historic Properties Survey	2005	Survey of historic properties in Sudbury - Phase 2.	Completed	\$9,800
Libby Land Purchase	2005	Purchase of the Libby property.	Completed	\$2,660,000
Willis Pond Dock	2005	New dock at Willis Pond.	Completed	\$6,000
Carding Mill Pond Harvesting	2006	To harvest non-native, invasive aquatic weeds in Carding Mill Pond.	Project in progress	\$32,000

Cemetery Ironwork Restoration	2006	To restore decorative ironwork located in the Revolutionary and Wadsworth cemeteries and tombs alongside Concord Road in the historic town center.	Project in progress	\$136,305
Hearse House Relocation and Restoration	2006	To relocate and restore the Hearse House, a former Town-owned building which sheltered the town hearse in the 1800s.	Project in progress	\$24,022
Lincoln Sudbury Community Athletic Field	2006	New community athletic complex on the grounds of Lincoln Sudbury Regional High School, including athletic field, running/walking track, and amenities.	Completed	\$960,000
Loring Parsonage Exterior Restoration	2006	Restoration of the exterior of the historic Loring Parsonage.	Project cancelled	\$74,281
Sudbury Housing Authority Units Purchase	2006	Funds for the Sudbury Housing Authority to put down payments on the purchase of existing or newly constructed housing units to be added to their rental housing inventory.	Project in progress	\$360,000
Town Land Feasibility Study	2006	Feasibility studies on 2 parcels of land for appropriateness for affordable housing/recreation uses.	Project in progress	\$50,000
Walkway Construction	2006	Engineering, design, and construction of walkways for recreational use.	Completed	\$100,000
Wayside Inn Site Study	2006	Comprehensive site survey of 125 acres at the Wayside Inn, including surveying, resource delineation, and landscape architecture research.	Completed	\$85,720
Appraisal of Hosmer Paintings	2007	Appraisal of 471+/- paintings owned by the Town.	Project in progress	\$16,000
Bruce Freeman Rail Trail	2007	3 projects related to the Bruce Freeman Rail Trail project, including: title review, 4 season wildlife study, and creating an existing conditions base map	Project in progress	\$145,000

Carding Mill House Restoration	2007	Architectural and engineering study of the Carding Mill House to use as a planning base for future uses of the property, and to make the structure both weather proof and vandal proof.	Completed	\$25,000
CSX Land Purchase	2007	Purchase of approximately 9.7 acres of undeveloped land known as the CSX rail corridor for open space and recreation use.	Project in progress	\$420,000
Sudbury Housing Trust Allocation	2007	Appropriation to the Sudbury Housing Trust, which will use this funding towards affordable housing initiatives in accordance with the Trust provisions and in conformance with the 2005 Community Housing Plan.	Completed	\$385,000
Town Center	2007	Engineering and design funding for historical facets of the Town Center Project; other phases include open space and recreation aspects.	Project in progress	\$30,000
Military Training Field Archaeology	2008	Archaeological study of the Military Training Field	Completed	\$10,000
Nobscot Reservation Purchase of Development Rights-Phase 1	2008	Purchase of a conservation restriction on 160 acres of land known as the Nobscot Boy Scout Reservation.	Completed	\$5,545,000
Nobscot Reservation Purchase of Development Rights - Phase 2	2008	Purchase conservation restriction on 145 acres of land known as the Nobscot Boy Scout Reservation.	Project in progress	\$2,030,000
Stearn's Mill Dam Evaluation	2008	Evaluation of historic, town-owned dam.	Completed	\$14,600
Sudbury Housing Authority Unit Reconstruction	2008	Partial funding for replacement of 4 SHA-owned single family dwellings with new, duplex units, and to construct a new single family dwelling.	Project in planning stage	\$600,000
Sudbury Housing Trust Allocation	2008	Funds to continue Sudbury Housing Trust's efforts to provide for the preservation and creation of affordable housing.	Completed	\$750,000
Town Clerk Document Preservation	2008	Preservation survey of the paper based collection of the Sudbury Town Clerk's office.	Completed	\$2,300

Town Hall Window Restoration	2008	Restoration of second floor windows in historic Town Hall.	Project in planning stage	\$46,800
Bruce Freeman Rail Trail	2009	Funds will enable the creation of a concept plan for the rail corridor.	Project in progress	\$25,000
Historic Preservation Projects	2009	Continuation of Survey of Sudbury's Historic Properties and restoration of gravestones in the Mount Pleasant and Old Town Cemeteries.	Projects in progress	\$18,000
Land Preservation at 79 Lincoln Lane	2009	Preservation of a parcel of land for permanent conservation.	Project waiting for funding	\$25,000
Loring Parsonage Exterior Restoration	2009	Restoration of the exterior of the historic Loring Parsonage.	Project in progress	\$229,000
Sudbury Housing Trust	2009	Funds will preserve and create affordable housing in Sudbury.	Projects in progress	\$208,000
Town Clerk Historic Document Preservation	2009	Funds will restore, conserve and preserve historic public records from the 17th, 18th, 19th, and early 20th centuries.	Project in progress	\$170,000

III. Sudbury's Community Preservation Goals

Sudbury's Community Preservation Goals are embodied in the goals and objectives of the Town's Master Plan, Open Space and Recreation Plan, Land Use Priorities Committee Report, Town-wide Comprehensive Facility Study and Housing Plan, as well as new goals developed annually by the Board of Selectmen. It should be noted that in recommending to Town Meeting the award of Community Preservation Act funding, the Community Preservation Committee will give preference to projects which fulfill stated goals of the Town, and address more than one CPA-eligible area.

Open Space

Sudbury enjoys a variety of open space resources distributed throughout town. These include conservation areas maintained by the Sudbury Conservation Commission, Nobscot Boy Scout Reservation, Great Meadows National Wildlife Refuge, Assabet River National Wildlife Refuge, Massachusetts Federation of Women's Clubs Memorial Forest, and Sudbury Valley Trustee reservations. Sudbury also enjoys many privately-owned parcels of land that add significantly to the "rural" character of the Town, but which are not permanently protected from development.

The Town has recently completed its 2009-2013 Open Space and Recreation Plan, which builds on the goals of previous plans, including protection of the Town's water supply, protection of

wildlife habitat, trail linkage, recreation facilities for active and passive recreation, and preservation of the Town's historic character.

Sudbury's Open Space Goals

Goal: Preserve Town character through the permanent protection of undeveloped land, surface water bodies and wetlands, agricultural lands and uses, publicly cherished views and historic sites.

Goal: Protect land areas and migration corridors for the well-being of indigenous flora and fauna.

Goal: Protect the quality and quantity of the Town's water supply, through both aquifer protection and water use education.

Goal: Protect and restore the quality of the Town's ponds and waterways.

Goal: Provide and maintain a diversity of conservation and recreation land uses reflecting the interests and needs of the whole community, including opportunities for both active and passive recreation.

Goal: Develop and maintain trail linkages by connecting old or creating new walkways and trails for non-motorized recreation.

Goal: Continue to provide outreach to increase awareness among residents of the range of the Town's open space and recreational assets, and of their possible uses and entry points.

Specific Criteria for Open Space Projects

Open space proposals which address as many of the following criteria as possible will receive preference:

- Permanently protect important wildlife habitat, including areas that
 - are of local significance for biodiversity;
 - contain a variety of habitats, with a diversity of geologic features and types of vegetation;
 - contain a habitat type that is in danger of vanishing from Sudbury; or
 - preserve habitat for threatened or endangered species of plants or animals.
- Preserve Sudbury's rural and agricultural character.
- Provide opportunities for passive recreation and environmental education.
- Protect or enhance wildlife corridors, promote connectivity of habitat or prevent fragmentation of habitats.
- Provide connections with existing trails or potential trail linkages.
- Preserve scenic views.
- Border a scenic road.
- Protect drinking water quantity and quality.
- Provide flood control/storage.
- Preserve important surface water bodies, including wetlands, vernal pools or riparian zones.
- Preserve a parcel identified in the 2009-2013 Open Space and Recreation Plan.

Potential Future Open Space Projects

The following projects were identified by the Conservation Commission, Planning Board, Selectmen or other town boards or departments during 2009 goal setting sessions:

- Open Space and Recreation Plan priorities
- Review all 61A/B parcels for Town needs
- Hop Brook remediation
- Update Trails Plan
- Trail maintenance/stewardship
- Invasive Species eradication
- Environmental remediation
- NYANZA Trust Fund projects

Historic Preservation

Reverence for the past is amply demonstrated in Sudbury in areas where the look and feel of a small New England town has been preserved. Residents treasure the open space, stone walls, and beautiful older homes that grace many of the Town's scenic roadways. Historic District boundary designations have been adopted to preserve and maintain older structures in several areas in town. An active Historical Commission, Historic Districts Commission and Historical Society work to enhance preservation efforts. Recent efforts include signage on homes stating the year built, roadside markers delineating historic district boundaries, completion of inventories of non-designated historic structures, creation of a new historic district, restoration of several historic Town structures, and commencement of a preservation project for historic Town documents.

Sudbury also has many historical landmarks, including:

- Longfellow's Wayside Inn National Historic Site, including the Grist Mill, Martha-Mary Chapel and the Little Red School House.
- Town cemeteries dating back to colonial times.
- Native American settlements.
- Monuments commemorating the King Philip War and the American Revolution.
- The Hosmer House, which is a popular historic landmark used by residents for meetings and receptions as well as a museum for the former owner's paintings.

Sudbury's Historic Preservation Goals

Goal: Preserve and maintain Sudbury's historic landmarks and historic districts.

Goal: Maintain the community's traditional, historic character.

Goal: Integrate the buildings and property in the Town Center for increased public awareness and usage, including creation of an historic walking trail in the Town Center.

Goal: Re-evaluate the historic district boundaries to assure incorporation of historically significant buildings and properties within the districts.

Goal: Address circulation patterns around the Town Center (both pedestrian and vehicular).

Goal: Expand the use of the Scenic Roads Bylaw in order to preserve the character of older roads.

Specific Criteria for Historic Projects

Historical proposals which address as many of the following criteria as possible will receive preference:

- Protect, preserve, enhance, restore and/or rehabilitate historic, cultural, architectural or archaeological resources of significance, especially those that are threatened;
- Protect, preserve, enhance, restore and/or rehabilitate Town-owned properties, features or resources of historical significance;
- Protect, preserve, enhance, restore and/or rehabilitate the historical function of a property or site;
- Project is within a Sudbury Historic District, on a State or National Historic Register, or eligible for placement on such registers, or on the Sudbury Historic Properties Survey;
- Project demonstrates a public benefit; or
- Project demonstrates the ability to provide permanent protection for maintaining the historic resource.

Potential Future Historic Preservation Projects

The following projects were identified by the Sudbury Historical Commission, Historic Districts Commission, Planning Board, Selectmen or other town boards or departments during 2009 goal setting sessions:

- Town Hall restoration
- Flynn Building restoration
- Loring Parsonage restoration
- Carding Mill house restoration
- Town Historical Museum
- Historic Town Center intersection design
- Historic Town document/artifact assessment, preservation and storage
- Expansion of Historic Districts
- Hosmer House restoration
- Military Training Field restoration and ammunition shack
- Complete Old Homes Survey
- Ground penetrating radar survey of cemeteries
- Private property Historic Preservation restrictions
- Scenic Road preservation
- Tree replacement program
- Wooden guardrail replacement program on scenic roads

Community Housing

As far back as 1968, concern was expressed that Sudbury's housing stock was becoming more and more homogeneous due not to an overt plan but to the very nature of the zoning bylaws and the natural pressures of the housing market. Over the past decade, the Town has actively adopted bylaws which allow more diversity in housing styles. Amendments to the Zoning Bylaw encouraging more moderate priced housing have passed (Incentive Senior Development and Accessory Apartment bylaws) and the market is beginning to respond to the demand for

more diverse housing styles. Several 40B Comprehensive Permit developments have been constructed over the last decade, providing condominium style housing at both market and affordable levels. However, Sudbury still remains a predominantly single family housing community, effectively shutting some populations, particularly older residents, less affluent families and single people, out of Sudbury’s housing market due to a lack of housing to fit different lifestyles.

State housing policy sets a goal of 10% affordable housing for municipalities throughout the state. We are currently at 4.7% of the total housing stock certified as affordable. Sudbury, with its concentration of single-family housing and escalating land values, has a long way to go in providing the kind of diversity called for by the state and desired by the Town.

Affordable Housing Units as certified by the Department of Housing and Community Development, November 2008:

- Musketahquid Village (64 elderly/disabled rental units)
- Longfellow Glen (50 elderly, 70 family rental units)
- Orchard Hill Assisted Living (45 rental units)
- Sudbury Housing Authority scattered sites for families, single family and duplexes (21 rental units)
- Carriage Lane (4 homeownership units)
- Snowberry Lane (2 homeownership units)
- Home Preservation Units (3 homeownership units)
- Villages at Old County Road (3 homeownership units)
- Habitat for Humanity (2 homeownership units)

Total affordable units: 264

Sudbury’s housing characteristics:

Age of Single Family/Condominium Housing Structures		
Year Built	Number	Percent
2001-2009	426	7.5
1991-2000	763	13.4
1981-1990	643	11.4
1971-1980	738	13.1
1961-1970	1234	21.8
1951-1960	1234	21.8
1941-1950	171	3.0
Before 1940	446	7.9
Total Units = 5655		

Source: Sudbury Assessing Department, 2009

Single Family/Condominium Housing Values, 2009			
Valuation (\$)	Number	Percent	% Change 2000-2009
Under 300,000	190	3.4	-18%
300—499,999	1830	32.4	-12%
500—699,999	1730	30.1	+7%
700—899,999	1038	18.4	+24%
900—999,999	220	3.9	
1,000,000-1,999,999	608	10.8	
2,000,000 and over	39	0.7	
Total Units - 5655			

Source: Sudbury Assessing Department, 2009, and 2000 Census

Sudbury's Housing Goals

- Goal: Encourage greater diversity of housing opportunities in Sudbury to meet the needs of a changing and diversified population with respect to age, household size and income.
- Goal: Evaluate the current trend of "tear-downs" to determine the impact on the community and the housing stock.
- Goal: Expand housing opportunities in business districts.
- Goal: Encourage affordable housing units, including comprehensive permits that recognize the community's needs and goals.
- Goal: Allow incentives for inclusion of affordable housing units in single-family subdivisions (Inclusionary Zoning).
- Goal: Support Sudbury Housing Trust initiatives to create, fund, construct and administer affordable housing.

Specific Criteria for Community Housing projects

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

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

Potential Future Community Housing Projects

The following projects were identified by the Sudbury Housing Trust, Sudbury Housing Authority, Planning Board, Selectmen or other town board or department during 2009 goal setting sessions:

- Melone (gravel pit) property – housing potential
- Continue the Home Preservation program
- Maynard Road development
- Special Needs Housing/Woods Walk Sanctuary
- Resident Assistance – Small Grants Program, Down Payment Assistance
- Other 40B/61A/Site Feasibility
- Longfellow Glen – expiring use issue
- Increase rental housing opportunities
- Units for 100% area median income
- Energy savings in affordable units

Recreation

The Town of Sudbury, through its Park and Recreation Commission, maintains and manages the recreational facilities, areas and programs established by the Town. The Commission divides its service sectors into three divisions—facilities, areas, and programs. Facilities are recreational lands that contain buildings or other structures, such as tennis courts, basketball courts, playgrounds, etc. Areas are recreational lands which do not contain buildings or structures, such as soccer fields. Programs are supervised activities conducted at either a facility or an area.

Properties owned by the Town and managed by the Park and Recreation Commission include:

Davis Recreation Area: 29 acres on Route 117, 8-10 acres of which are suitable for active recreation. There are no services at this area with the exception of a portable toilet.

Fairbank Community Center: 8 acres located on Fairbank Road across from Haskell Field serve as the major recreation site for the Town of Sudbury. The Community Center is the location for the Park and Recreation Department offices, as well as the Atkinson Pool, Teen Center, Fairbank Senior Center and Sudbury Public Schools K-8 Central Office. Site improvements to the Community Center were completed in 1997 with the reconstruction and improvements to the parking lot, walkways, landscaping, outdoor basketball courts, and the addition of a sand volleyball court and golf putting area. This facility has wheelchair accessible parking, entrances, lavatories, drinking fountains, programs and services.

Featherland Park: 40 acres on Morse Road that serve as a major site for Little League baseball and softball. Outdoor skating areas in the parking lots are available for use during winter months. Four tennis courts are located here as well. Restroom facilities are available however they are not wheelchair accessible.

Frank Feeley Park: 150 acres on Raymond Road, 30 acres of which are suitable for active recreation, primarily baseball, softball and tennis. Restroom facilities are available however they are not wheelchair accessible.

Haskell Field Recreation Area: 29 acres on Hudson Road that serve as the major site for active recreation in Sudbury. Other facilities at this area include the Toddler Playground/Boundless Playground, which was renovated and expanded in 2009. Restroom facilities are available however, they are not wheelchair accessible (renovations to the restrooms to make them accessible are planned).

Heritage Park: 4.4 acres on Concord Road in the Town Center adjacent to the Hosmer House used for passive leisure activities (walking, picnicking).

Lincoln Sudbury Community Field: Located at the regional High School, the field has recently been renovated using CPA funds, allowing scheduled use by the Town Park & Recreation Commission and the general public. Facilities at the Community Field include a turf field suitable and lined for football, soccer or lacrosse, running track, track and field jumping areas and bleachers.

Cutting Field: 4 acres on Maynard Road purchased with CPA funds and constructed with one turf field for active team sports. There are no services at this area with the exception of a portable toilet.

Other recreation areas in Sudbury include the school properties, which host many intramural sports, and Town conservation lands, which contain walking, cross country ski, horseback riding and biking trails.

In 2008, users of Town Park and Recreation fields and areas totaled approximately 7800. Users in the following categories are included in this number:

- Sudbury Women's Softball
- Women's Soccer
- Men's Over the Hill Soccer
- Sudbury Youth Soccer
- Youth Lacrosse
- Little League
- LSRHS Athletics (all sports groups using Town facilities)
- Girls Softball
- Sudbury Babe Ruth
- Men's Softball and Baseball
- Boston Ski & Sports Club (adults)
- Charles River Radio Controller
- Central Massachusetts Spacemodeling Society

In addition to field users, the Atkinson Pool and the Fairbank Community Center provide space for many active recreation uses, including:

- Sudbury Summer Campers
- Teen Center
- Atkinson Pool Members
- Council on Aging Exercise Classes

- Jazzercise
- Lincoln Sudbury Regional High School swim team
- Private swim teams
- Park & Recreation program users (year-round)

As the Town has grown, so has the population of residents who utilize town recreational fields and areas. It is likely that additional land and facilities acquired for park and recreation use in Town will be desired as the population grows.

Sudbury's Recreation Goals

Goal: Create additional recreational facilities, areas and programs to serve the needs of Sudbury residents while protecting our limited natural resources.

Goal: Expand trail systems on conservation land for passive recreational use.

Goal: Provide additional opportunities for active recreation.

Goal: Increase alternative forms of transportation in Sudbury, including but not limited to bikeways.

Goal: Complete the Town walkway program.

Specific Criteria for Recreation projects

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

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

Potential Future Recreation Projects

The following projects were identified by the Park and Recreation Commission, Planning Board, Selectmen or other town board or department during 2009 goal setting sessions:

- Davis field expansion
- Melone (gravel pit) recreation potential
- Parkinson field development
- Outdoor pool
- Sprayground
- Fitness center at Fairbank Community Center
- Summer camp program expansion
- Nobscot "outward bound" program
- Haskell Field parking reconfiguration
- Continue implementation of walkway master plan
- Continue study of BFRT, CSX and MBTA railroad corridors

General CPA Criteria

In addition to the project-specific criteria discussed above, the Sudbury Community Preservation Committee will give preference to proposals that meet the following general criteria:

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

IV. Project Eligibility and Funding

The Community Preservation Committee requires that all proposed projects be eligible for CPA funding according to the requirements described in the legislation. Funds collected under the CPA can only be spent for four main community preservation purposes – open space, historic preservation, community housing and land for recreational use. In addition, at least 10% of the funds received in any fiscal year must be spent or set aside for each of the first three of those areas (open space, historic preservation and community housing). The remaining 70% of each year's funds can be spent in any of the four areas. However, these funds cannot be spent on maintenance or used to supplement funds being used for existing community preservation purposes. In addition, up to 5% of the annual Community Preservation revenues can be spent on administrative and operating expenses of the CPC.

The Town benefitted from significant state matching funds in the first several years of the program, and has reserved much of its revenue for future expenditures. All Community Preservation Act funding requests require the recommendation of the project by the CPC to Town Meeting, and a majority vote of Town Meeting, except for bonded projects and land acquisitions, which require a 2/3 majority vote of Town Meeting to authorize.

Bonding Policy

In Sudbury, it has been the stated policy of the CPC to bond land/development rights purchases in order to leverage CPA funds to the fullest extent. Bonding allows the Town to borrow funds to pay for large expenditures. The principal and interest are paid over a 20 year period, thereby significantly reducing the annual cost of large projects. If cash reserves are used for these high cost projects, the number of open space purchases that can be completed in a given time would be significantly limited, during which time other desirable open space land would likely be sold for development. Sudbury still has over 1,000 acres of privately owned undeveloped open space. The 2009-2013 Sudbury Open Space and Recreation Plan lists 36 such parcels worthy of protection. These open space purchases are a benefit to the Town forever, and the CPC strongly feels that more than one set of taxpayers should bear the cost of land conservation. The annual debt service for a bonded project typically begins at 1/10 of the project cost and decreases annually, allowing the CPC to save much of its revenue for future projects. The CPC has budgeted the cost of all existing CPA debt over the course of the life of the bonds so that we are sure that expenditures do not exceed revenue. Additionally, we have projected the debt service costs of future large open space projects and have determined the Town's debt service capacity so that informed decisions can be made at the appropriate time. Statewide, over 40 towns have bonded CPA projects; half of that total bonded amount has been for open space projects. Any bonds issued for CPA projects require the Town to collect a CPA surcharge to cover the cost of the debt service for the length of the bond term, or repayment from other sources.

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

Issue Date	6/15/2004	6/15/2004	6/15/2005	6/15/2009			
Payoff Date	6/30/2024	6/30/2024	6/15/2025	6/30/2029			
Orig.							
Borrowed	5,300,000	340,000	2,660,000	5,045,000	13,363,500		
Interest							
Pymnt.	2,148,497	137,828	1,094,800	1,622,274	5,004,325		
						Total P&I	
						(Debt	
						Service)	P Bal
	Cutting	Dickson	Libby	Nobscot I	Total Issues		
FY10 Principal	277,216	17,784	135,000	255,000	685,000		
FY10 Interest	152,273	9,768	82,413	127,821	372,275	1,057,275	10,305,000
FY11 Principal	277,216	17,784	135,000	255,000	685,000		
FY11 Interest	141,877	9,102	77,688	138,369	367,035	1,052,035	9,620,000
FY12 Principal	277,216	17,784	135,000	255,000	685,000		
FY12 Interest	131,482	8,435	72,963	131,994	344,873	1,029,873	8,935,000
FY13 Principal	277,216	17,784	135,000	255,000	685,000		
FY13 Interest	120,393	7,723	68,238	126,894	323,248	1,008,248	8,250,000
FY14 Principal	277,216	17,784	135,000	255,000	685,000		
FY14 Interest	109,304	7,012	63,175	121,794	301,285	986,285	7,565,000
FY15 Principal	220,833	14,167	135,000	255,000	625,000		
FY15 Interest	98,216	6,301	58,113	116,375	279,004	904,004	6,940,000

FY16 Principal	220,833	14,167	135,000	255,000	625,000		
FY16 Interest	89,382	5,734	53,050	110,478	258,644	883,644	6,315,000
FY17 Principal	220,833	14,167	135,000	255,000	625,000		
FY17 Interest	80,218	5,146	47,650	104,263	237,276	862,276	5,690,000
FY18 Principal	220,833	14,167	130,000	255,000	620,000		
FY18 Interest	70,832	4,544	42,250	97,569	215,195	835,195	5,070,000
FY19 Principal	220,833	14,167	130,000	250,000	615,000		
FY19 Interest	61,171	3,924	37,050	90,313	192,458	807,458	4,455,000
FY20 Principal	220,833	14,167	130,000	250,000	615,000		
FY20 Interest	51,233	3,287	31,850	82,813	169,183	784,183	3,840,000
FY21 Principal	220,833	14,167	130,000	250,000	615,000		
FY21 Interest	41,296	2,649	26,650	75,313	145,908	760,908	3,225,000
FY22 Principal	220,833	14,167	130,000	250,000	615,000		
FY22 Interest	31,138	1,998	21,450	67,500	122,085	737,085	2,610,000
FY23 Principal	220,833	14,167	130,000	250,000	615,000		
FY23 Interest	20,869	1,339	16,250	59,375	97,833	712,833	1,995,000
FY24 Principal	220,833	14,167	130,000	250,000	615,000		
FY24 Interest	10,490	673	10,888	51,094	73,144	688,144	1,380,000
FY25 Principal			130,000	250,000	380,000		
FY25 Interest			5,525	42,500	48,025	428,025	1,000,000
FY26 Principal				250,000	250,000		
FY26 Interest				33,594	33,594	283,594	750,000
FY27 Principal				250,000	250,000		
FY27 Interest				24,375	24,375	274,375	500,000
FY28 Principal				250,000	250,000		
FY28 Interest				14,844	14,844	264,844	250,000
FY29 Principal				250,000	250,000		
FY29 Interest				5,000	5,000	255,000	
All Principal	5,300,000	340,000	2,660,000	5,045,000	13,363,500		
All Interest	2,148,497	137,828	1,094,800	1,622,274	5,004,325	18,367,825	
TOTAL	7,448,497	477,828	3,754,800	6,667,274	18,367,825	18,367,825	

Administrative Funds Policy

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

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

The chart below summarizes the administrative fund expenditures/appropriations for the CPC since its inception:

FY04	\$ 7,563	0.35%
FY05	\$38,783	1.76%
FY06	\$ 8,898	0.38%
FY07	\$70,214	2.75%
FY08	\$76,522	2.88%
FY09	\$98,816*	4.26%
FY10	\$95,000 (appropriated)	4.8%

*FY09 administrative expenses included a carry forward amount of \$10,200 from FY08 to complete a project that was in progress at the fiscal year end.

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

1. The use of administrative funds must be deemed by majority vote of the Committee to be appropriate and necessary and to meet one or more of the following criteria:
 - a) the expense is attributable to the operations of the Committee or to the administration of CPA funds generally, or
 - b) the project as a whole meets the requirements and limitations of the CPA and the General and Specific Guidelines of the CPC Report.
2. Any application for the use of administrative funds must demonstrate in writing, and with specificity, that the request falls under one of these areas.
3. If the application meets either of the above criteria, then the Committee will consider whether:
 - a) time is a critical factor, or
 - b) there is a lack of other funding resources (this last reason cannot be the *sole* reason for the granting of administrative funds).

4. An application for the use of administrative funds must, at the least, address the following items as they prove germane to the type of request:
 - a) How exactly does the request relate to a planned project, and how does that project meet the relevant General and Specific Criteria found in the CPC Report?
 - b) What exactly are the time-sensitive attributes of the request, and why is it not possible or desirable to wait until the following Town Meeting?
 - c) If the request is for consultant funding, either for consultant hours or a complete study, what exactly do we seek to learn from the end product (RFP-level detail)?
 - d) What alternative funding sources were approached, when and through whom? Why was the request denied?
5. Approval of applications for Administrative Funds is in the sole discretion of the Committee which will consider the language of the Act, guidance from the Community Preservation Coalition, the above-stated Policy, and the availability of funds, including consideration of potential future projects and expenses.

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

Areas Appropriate for the Use of Administrative Funds

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

Areas NOT Appropriate for the Use of Administrative Funds

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

V. The Future of the Community Preservation Act

Legislative

There is pending legislation to revise portions of the Community Preservation Act. As local communities and the State have administered the Act over the last seven years, the

interpretation of some portions of the legislation, the perpetual funding source for the state matching funds, eligible expenses under the act, and a variety of other issues have created a need for revision and refinement of the original legislation. The Community Preservation Coalition website is an excellent source to track the progress of the pending legislation, as well as receive the full text of the amendments and summaries. The coalition is an alliance of open space, affordable housing, and historic preservation organizations that works with municipalities to help them understand, adopt, and implement the CPA. Members of the Coalition include: the Citizens Housing and Planning Association (CHAPA); the Massachusetts Affordable Housing Alliance (MAHA); the Massachusetts Audubon Society; the National Trust for Historic Preservation; Preservation Massachusetts; the Trust for Public Land (TPL) and The Trustees of Reservations (TTOR). Their website is www.communitypreservation.org.

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

Financial

The Sudbury CPC has kept a keen eye on the local and state finances for CPA, which is especially important due to the Town’s existing debt service requirements and the committee’s desire to bond large open space expenditures. Although local CPA revenues are projected to increase slightly over the next five years, state matching funds have been declining annually. This is due to the combination of an increase in the number of communities adopting the CPA (142 to date), and therefore competing for the state funds, as well as a decrease in the state CPA trust fund, which is funded solely from receipts at the Registry of Deeds. For this reason, the Sudbury CPC has projected future debt service needs taking into account only local revenues. This conservative approach will enable the Town to pay off all existing CPA debt without the need for other payment sources.

The trend in declining state matching funds is represented below:

Fiscal Year	# of Communities	CPA billed locally (in millions)	Registry receipts (in millions)
FY02	34	\$17.85	\$41.30
FY03	54	27.16	53.80
FY04	61	30.82	50.50
FY05	82	46.34	37.40
FY06	102	58.67	36.10
FY07	113	68.13	31.90
FY08	127	74.07	27.00
FY09	135	78.18	34.02

VI. Solicitation of Project Proposals

The Community Preservation Committee welcomes project proposals that may contribute to community preservation in Sudbury. Forms and guidelines for submission have been developed and are available on the Town's web site at www.sudbury.ma.us.

A public forum on the recommendations of the CPC, is held each year prior to Town Meeting.

Community Preservation Committee:

Christopher Morely, Chairman, Planning Board representative

Richard Bell, Conservation Commission representative

Sherrill Cline, Sudbury Housing Authority representative

John Drobinski, Board of Selectmen representative

Georgette Heerwagen, Park and Recreation Commission representative

James Hill, Sudbury Historical Commission representative

Seamus O'Kelly, At-Large member

Lynne Remington, At-large member

Sheila Stewart, Finance Committee representative

VII. Project Form

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

PROJECT SUBMISSION FORM

Submitter:

Group or Committee Affiliation (if any):

Submitter's address and phone number:

Submission Date:

Purpose (please select all that apply):

Open Space

Community Housing

Historic

Recreation

Submitter's email address:

Project Name:

Project Description:

Costs:

Fiscal Year	Total Project Cost	CPC Funds Requested	Other Funding Sources (amount and source)
2010			
2011			
2012			
2013			
2014			
Total			

How does this project meet the General Criteria and Category Specific Criteria for CPC projects (see attached)?

Does this project fall within the jurisdiction or interest of other Town Boards, Committees or Departments? If so, please list the boards, committees or departments, whether applications and/or presentations have been made, and what input or recommendations have been given.

For Community Preservation Committee Use:

Form Received on: _____ Project Presented to CPC on: _____

Reviewed by: _____ Determination: _____

TOWN OF SUDBURY COMMUNITY PRESERVATION COMMITTEE

Guidelines for Project Submission

- 1) Each project request must be submitted to the Community Preservation Committee using the Project Submission Form as a cover sheet. Applications should be submitted in twelve (12) multiple copies.
- 2) Requests must include a statement of need and be documented with appropriate support information. The use of maps, visual aids and other supplemental information is encouraged.
- 3) Obtain written proposals, estimates, quotes and such other evidence to document project scope and cost.
- 4) If the request is part of a multi-year project, include the total project cost and allocations.
- 5) Describe the endorsement, support or other recommendation, if any, by other Town Boards, Committees and Departments.
- 6) Provide examples of similar project proposals in other communities, if any, including examples of project scope, project cost and status of completion.
- 7) For applicants that have multiple project requests, please prioritize projects.
- 8) Requests must be received by **October 30, 2009** to be considered for recommendation at the April, 2010 Annual Town Meeting.
- 9) Applicants must be present at a CPC meeting to answer questions. The CPC meeting schedule for the fall will be announced in September, 2009 and posted on the town's website.

Please keep in mind that there are legal limitations on the use of CPA funds. Additional information on the CPA and the Community Preservation Committee can be found on the town's website at www.sudbury.ma.us, under Committees. The committee can be reached by email at cpc@sudbury.ma.us. If you are in doubt about your project's eligibility, after consulting these sources, you are encouraged to submit an application so that the Committee can determine eligibility.

Please submit the Project Submission Form and accompanying documentation to:

Community Preservation Committee
c/o Planning and Community Development Department
278 Old Sudbury Road
Sudbury, MA 01776
(978)639-3387