

FY25 Operating Budget - Considerations

- Select Board Goals
- Economic Sustainability
- Employee Health Insurance Benefit Expense
- Personnel
 - Town Planner
 - Conservation Agent
 - Sustainability Grant Coordinator
 - Recreation Staffing
 - Public Works Staffing
 - Fire/Ambulance Staffing
 - Treasurer/Collector Integration
 - “COLA”
- Energy Expense – Electricity and Natural Gas
 - Supply Contract
 - Delivery Cost
 - Library Use
- Stabilization Funds – General, Capital, Special Education
- Local Revenue/Revolving Funds
 - Ambulance Supplemental Appropriation
 - Supplement to Library Operating Expenses
 - Fees
- Overlay
- Budget Calendar



Town of Sherborn FY25 Budget Calendar

September 6 th	Capital Budget Guidance Letter sent to Departments (Capital Budget Committee)
October 4 th , 11 th	Advisory Committee Budget Guidance and COLA Discussions
October 5 th , Nov 2 nd	Discuss Goals/Strategic Needs for FY25 with Select Board (Town Administrator/Finance Director)
November 1 st	Budget Guidance Letter sent to Departments (Advisory Committee)
November - December	Town Administrator and Finance Director meet with Municipal and School Departments to discuss capital and operating budget requests
November 17 th	Departmental capital budget requests submitted to Town Administrator and Finance Director
December 7 th	Town Meeting Warrant opens (Select Board)
December 1 st	Consolidated Capital Plan submitted to Capital Budget Committee with updated Six-Year Capital Plan (Town Administrator/Finance Director)
December 15 th	Departmental budget requests submitted to Town Administrator and Finance Director
December 31 st	Town Administrator and Finance Director submit consolidated operating budget to the Select Board and Advisory Committee.
January 25 th	Town Meeting Warrant closes (Select Board)
February 16 th	Annual Town reports due to Select Board/Town Administrator's office
January XX	School Committee Annual Budget Hearing ←
January - February	Advisory Committee reviews budget requests. Capital Budget Committee reviews capital budget requests
March XX	Select Board Budget Review Meeting ←
March 16 th	Advisory Public Hearing
April 13 rd	Town Meeting Warrant Report mailed to all households
April 23 rd	Annual Town Meeting - Votes on the Operating and Capital Budgets
May 14 th	Annual Town Election
June 30 th	Current Fiscal Year Ends
July 1 st	New Fiscal Year Starts
November	Tax Classification Hearing and Final Tax Rate Set (Board of Assessors, Select Board)

DRAFT: July 30, 2023

Sherborn Advisory Committee

Schedule of Meetings, Fall 2023 and Spring 2024

All meetings on Wednesday at 7 pm unless otherwise noted

Additional meetings may be added if necessary

2023	
August 30	Organization meeting; Schedule; and Background briefing for new members
September 13	Warrant articles presentations
September 27 (Wednesday, 7pm)	Advisory Public Hearing
October 4	Guidance and COLA 1
October 11	Guidance and COLA 2
October 17 (Tuesday)	Special Town Meeting
November 1	Finalize Guidance and COLA
2024	
January 10	Budget Review 1
January 24	Budget Review 2
February 7	Budget Review 3
February XX	Schools budget briefings
February 28	Warrant Articles 1
March 6	Warrant Articles 2
March 16 (Saturday, 8am)	Advisory Public Hearing
Memo: Other Key dates	
2023	
October 4, 2023 (Wednesday)	Advisory Report to printer
October 10, 2023 (Tuesday)	Advisory Report mailed
November 23-24, 2023	Thanksgiving school break
2024	
February 19-23, 2024	School winter break
March 21, 2024 (Thursday)	Warrant article writeups due to Adv Cmte Chair
April 15-19, 2024	School spring break

SELECT BOARD

**GOALS FY2024
DRAFT**

JUNE 1, 2023



Sherborn Select Board – 2021 Mission and Goals

Human Resources

Create a positive and productive environment for all Town employees

- ~~A. Conduct search for new Police Chief and complete the hire~~
- ~~B. Support hiring of new Superintendent of Schools~~
- ~~C. Resolve Town Administrator position and contract~~
- D. Formalize performance review process and goal setting for Select Board direct reports
- ~~E. Negotiate and sign DPW union collective bargaining agreement~~
- F. Formally update Town organization chart and publish it

Financial

Maintain prudent fiscal / budget policy

- A. Work with Advisory Committee to reduce property tax escalation
- B. Maintain oversight of budgets for departments reporting to SB
- C. Reduce legal fees
- D. Study financial benefits of initiating Community Preservation Act

Town Infrastructure

Build and maintain the facilities to support Town functions and residents' needs

- A. Ensure Library project completion and pursue ongoing legal remedies
- ~~B. Reconfigure Town Hall for reopening after Covid-19 restrictions ease~~
- ~~C. Develop process to identify, analyze, and select best option for Senior Center~~
- D. Conduct infrastructure assessment of Community Center and negotiate lease
- ~~E. Integrate all Town Campus facilities and grounds including Kestick property~~
- F. Perform infrastructure review of Woodhaven
- ~~G. Evaluate Pine Hill access road, including potential State-approved bonding~~
- H. Identify location and build-out space for Historical Society Museum

Communications

Ensure Town-wide collaboration

- A. Explore new mechanisms of communicating with residents beyond Web sites and NextDoor
- B. Foster collaborative efforts between Town departments to better integrate joint activities

New Development

Plan for and manage growth consistent with Town Master Plan, Open Space & Recreation Plan, and affordable housing goals

- A. Support projects on Coolidge Street including negotiating Inter-Municipal Agreements with Natick and Framingham
- B. Anticipate and manage other potential new development projects

Sustainability

Advocate increased sustainability

- A. Support Sustainability Coordinators to mitigate climate change Town-wide
- B. Promote solar and Green Communities projects for Town buildings and property
- C. Seek additional grant sources
- D. Enhance measures supporting groundwater quality and quantity, waste reduction, and climate resilience





Select Board Vision and Values Basis for Goals – FY2024

Community Governance and Engagement

The Board values its role as Sherborn's policy making leader, informed by long term strategic thinking and planning, through communication and collaboration with all stakeholders.

The Board values community volunteers, recognizes that the Town could not function without them, and therefore wishes to nurture those relationships. The Board encourages new voices, diverse perspectives, and broad civic engagement.

The Board values its dedicated Town employees, and their commitment to collaboration and support of community volunteers. The Board encourages Town employees to constantly challenge the status quo, pursue operational efficiencies, and find a better way to meet Sherborn's needs.

Economic Sustainability *

Sherborn will achieve and maintain economic sustainability through prudent decision making, fiscal restraint, and carefully guided development while preserving the town's rural atmosphere and excellent schools.

Land Use, Zoning and Housing *

Sherborn's zoning by-laws will continue to protect our rural atmosphere, open space, and water resources, while guiding limited development in support of housing diversity. Housing options in Sherborn will accommodate residents of diverse ages and economic resources while preserving the Town's rural atmosphere, environmental health, and sustainability.

Town Center and Circulation *

Sherborn Town Center will maintain its legacy as a historic rural village with inviting gathering places, safe pedestrian walkways and bicycle routes, and successful small businesses that contribute to the social vitality and fiscal stability of the town. Sherborn will be known for scenic, tree-shaded roads, interconnected bicycle routes, and walkways and trails that promote a healthy lifestyle. Roadways and roadsides will be designed for safe sharing by all users: vehicles, pedestrians, bicyclists, and equestrians.

Natural Resources, Open Space and Recreation Resources*

Sherborn's clean water sources, forest ecosystems and biodiversity, scenic open spaces, and agricultural heritage will be actively protected, maintained, and improved to support the health and quality of life of the town's residents and environmental health throughout the region. Sherborn's trails and open space recreational resources will be protected and promoted as major assets of the town. Sherborn will maintain diverse recreational resources, facilities, and programs that contribute to the health and community engagement of its residents of all ages.

Cultural Resources *

Sherborn will continue to depend upon and benefit from volunteer citizen participation in government, community resources, and social supports for all residents. The town will preserve its rich legacy of historic homes, landscapes, and stone wall-lined scenic roads, and will reap the economic, educational, and cultural benefits provided by these historic assets.

* Taken from the "Guiding Principles and Vision" of the 2019 Town Master Plan





Thoughts on FY2024 Goals

Community Governance

Create a positive and productive environment for all Town employees and volunteers

- A. Formalize performance review process and goal setting for Select Board direct reports
- B. Formally update Town organization chart and publish it
- C. Reconvene Government Study Task Force
- D. Review and Update Personnel Administration Plan and Human Resource Policies
- E. Review and Update Position Classification and Compensation Plan
- F. Review Fire & Rescue Department Staffing (Strategic Plan)
- G. Review Department of Public Works/Facilities Staffing
- H. Update Local Comprehensive Emergency Management Plan
- I. Continue Police Department Accreditation and Policy Updates (BMPs and Police Reform)
- J. Rationalize/ and review charter of all boards and committees
- K. Town Planner Position
- L. Conservation Administrator Position
- M. Combined Treasurer/Collector Position
- N. Town Clerk Succession Planning
- O. Continue to Explore Regionalization of Services (Public Health, Conservation, Planning, Sustainability, Recreation, Trash/Recycling, other?)
- P. Update Select Board Operating Procedures
- Q. Expand and promote Senior Tax Credit Program
- R. Develop performance metrics for town services
- S. Align Town Hall Office Hours and Work Schedules
- T. Crosstrain Town Hall Staff
- U. Review role of Cemetery Commission and investigate position of Cemetery Superintendent

INVESTIGATE

PUBLIC WORKS SUPPORT
FOR CEMETERY COMMISSION





Thoughts on FY2024 Goals

Engagement

Ensure Town-wide communication and collaboration

- A. Explore new mechanisms of communicating with residents beyond Web sites and NextDoor
- B. Foster collaborative efforts between Town departments to better integrate joint activities
- C. Update Town Website and keep information current
- D. Implement Quarterly/Monthly Town Newsletter
- E. Create Budget Dashboard to increase collaboration and transparency
- F. Work towards holding more hybrid public meetings
- G. Refresh Select Board Meeting Room Furnishings
- H. Sherborn 350th Anniversary Celebration
- I. Monthly Department Head Meetings
- J. Monthly Land Use Department Meetings
- K. Complete update of building permitting tracking software
- L. Continue buildout of Land Use Offices in Town Hall (co-located departments, service counter, cross-train staff)
- M. Continue buildout/refit of old Council on Aging offices to provide space for Recreation, Cemetery Commission, other?
- N. Broaden and diversify volunteer base for Boards and Committees
- O. Continue TA/SB open office hours in September/October
- P. Perform campaign to update resident/business contact information for CodeRed and distribution lists
- Q. Explore opportunities to collaborate and partner with School Department
- R. Continue initiative to convert Town paper records to electronic media

CAPITAL





Thoughts on FY2024 Goals

Economic Sustainability

Maintain prudent fiscal / budget policy

- A. Work with Advisory Committee to reduce property tax escalation
- B. Maintain oversight of budgets for departments reporting to SB
- C. Reduce legal fees
- D. Study financial benefits of initiating Community Preservation Act
- E. Continue IT Expense Consolidation
- F. Extend Cell Tower Leases
- G. Prudent and efficient use of ARPA Funds
- H. Centralize Purchasing and Contracting
- I. Implement Purchase Order System
- J. Create Budget Document (compliant with GFOA Distinguished Budget Presentation Awards Program)
- K. Create Budget Dashboard to increase collaboration and transparency
- L. Review and Update Town Financial Policies (polices, process, schedule, capital vs. operating costs, etc)
- M. Create and Maintain multi-year budget forecast model based on DLS guidance
- N. Update and publish Six-Year Capital Plan
- O. Explore options to fund Capital Plan
- P. Explore opportunities to diversify revenues (Town Center, Solar PILOT Agreements, other?)
- Q. Review and Update Town Employee Health Plan Design
- R. Improve town employee accrual tracking
- S. Plan for potential cost of Tri-County Regional Vocational Technical School Reconstruction Project





Thoughts on FY2024 Goals

Land Use, Zoning and Housing

Plan for and manage growth consistent with Town Master Plan, Open Space & Recreation Plan, and affordable housing goals

- A. Support projects on Coolidge Street including negotiating Inter-Municipal Agreements with Natick and Framingham
- B. Anticipate and manage other potential new development projects
- C. Perform Infrastructure Review of Woodhaven
- D. Support creation of North Sherborn Water/Sewer District to enable construction of Coolidge Crossing and Meadowbrook Commons
- E. Ensure compliance with Multi-Family Zoning Requirements for MBTA Communities (Section 3A of MGL Chapter 40A)





Thoughts on FY2024 Goals

Town Center and Circulation

Build and maintain the facilities to support Town functions and residents' needs

- A. Washington/Maple Intersection Safety Improvements (Roundabout) CAPITAL / GRANTS
- B. Explore improvements to Route 16/Route 27 Split and North Town Center (Route 27/16) – pedestrian, access, safety, bicycle, vehicle flow CAPITAL GRANTS
- C. Evaluate Geographic Information System (GIS) needs. Update and Consolidate Town GIS Information CAPITAL
- D. Explore water supply and wastewater collection for Town Center CAPITAL GRANTS
- E. Monitor compliance with existing and proposed PFAS standards for public water supplies (Town Campus and Woodhaven). Prepare compliance plan if necessary. CAPITAL GRANTS
- F. Explore safety improvements to Coolidge Street CAPITAL
- G. Implement 25mph and 20mph speed limits on appropriate roadways
- H. Support Town Hall Campus Improvements
- I. Town Hall Safety Improvements





Thoughts on FY2024 Goals

Natural Resources, Open Space and Recreation

Protect natural resources, support implementation of the Open Space & Recreation Plan, and advocate for increased sustainability

- A. Support Sustainability Coordinators to mitigate climate change Town-wide
- B. Promote solar and Green Communities projects for Town buildings and property
- C. Seek additional grant sources (Green Communities, MVP, HzD Mitigation, etc)
- D. Enhance measures supporting groundwater quality and quantity, waste reduction, and climate resilience
- E. Advocate for and Implement Municipal Energy Aggregation
- F. Implement Fire Station Solar Project
- G. Explore installation of rooftop solar at Transfer Station
- H. Farm Pond Watershed Based Plan
- I. Farm Pond Stormwater and Access Improvement Project
- J. Repairs to Farm Pond Berm
- K. Finalize and begin implementation of Phosphorus Control Plan (MS4 Stormwater Permit Requirement)
- L. Finalize and begin implementation of Climate Resiliency Action Plan
- M. Review Farm Pond Revolving Fund finances and update rules/regulations
- N. Obtain easement for town rail trail connection from Whitney Farm
- O. Support advocacy efforts for the completion of the Upper Charles Rail Trail through Sherborn

CAPITAL

CAPITAL





Thoughts on FY2024 Goals

Cultural Resources

Promote preservation of historic and cultural assets

- A. Ensure Library project completion and pursue ongoing legal remedies
- B. Complete Onsite-Insight evaluation of Community Center
- C. Identify location and build-out space for Historical Society Museum (Library Basement) CAPITAL
- D. Evaluate recommendations included in the "Aging in Sherborn: A Community Needs Assessment" study commissioned by the Sherborn Council on Aging
- E. Consider application to Massachusetts Cultural Council for a Cultural District Designation of the Town Center



Community Preservation Act (CPA) - Overview

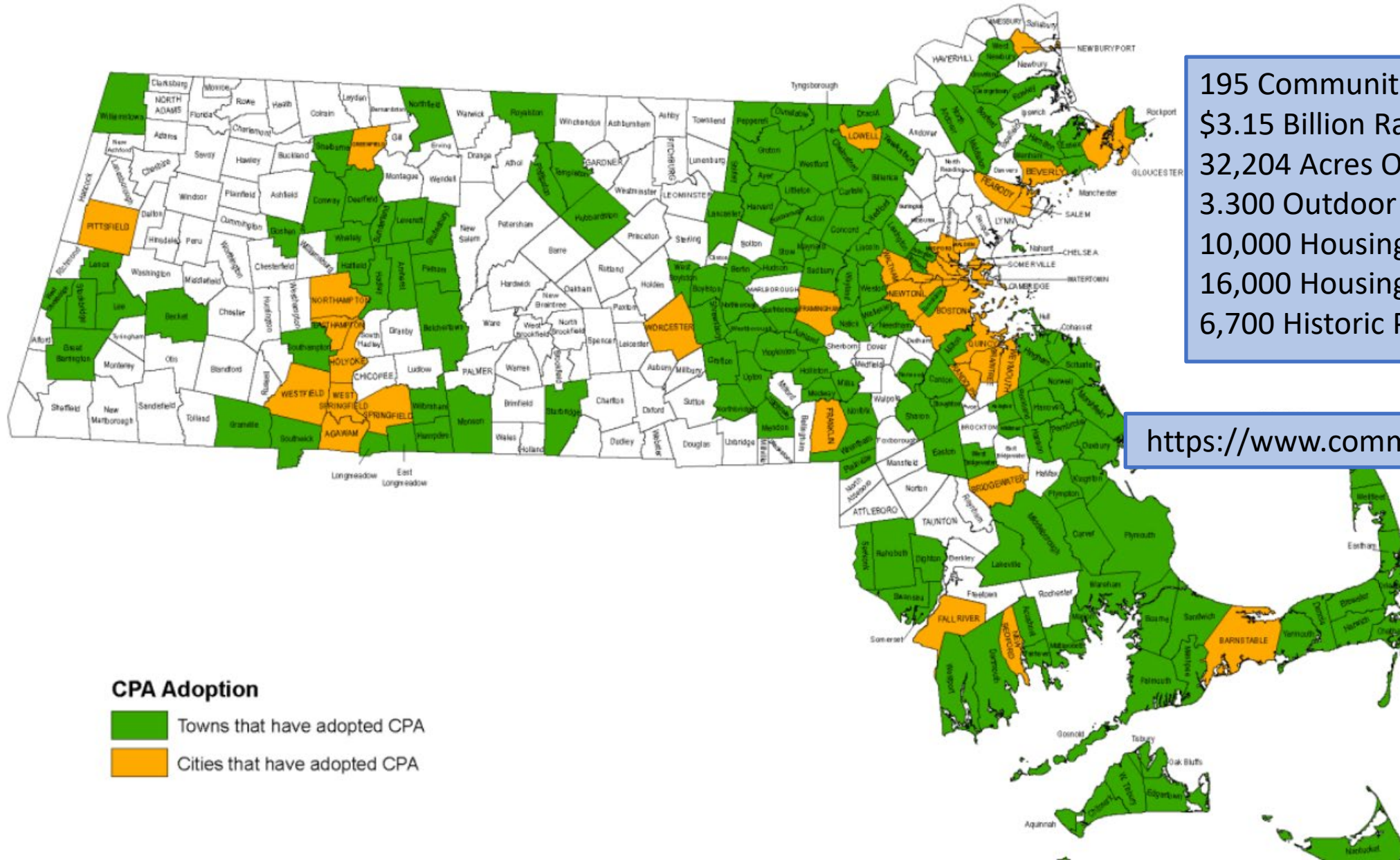
- State Law passed in 2000, MGL Chapter 44B
- Locally adopted by ballot referendum
- Adds surcharge on local property taxes
- Matching funds from statewide Community Preservation Trust Fund

CPA Fund Allowable Uses

- Build and rehabilitate parks, playgrounds, recreation fields, trails
- Protect Open Space
- Support Affordable Housing Development
- Preserve Historic Buildings and Resources

Community Preservation Act Adoption

May 2023



195 Communities
\$3.15 Billion Raised
32,204 Acres Open Space Preserved
3,300 Outdoor Recreation Projects
10,000 Housing Units Created
16,000 Housing Units Supported
6,700 Historic Preservation Projects

<https://www.communitypreservation.org>

Community Preservation Act - Funding

Local Revenue

- Surcharge of not more than 3% of the tax levy against real property
- Does not raise property tax rate
- Local option sets surcharge %

Community Preservation Trust Fund

- Statewide Trust Fund administered by DOR
- Surcharge on all real estate transaction filed at Registries (\$50/\$25)
- State Budget Surplus Funding
- Provides matching distribution funds annually to communities

Additional Funds through Bonding and Leveraging

Statewide CPA Trust Fund - Distribution History

Date of Distribution	Communities Receiving Distribution	Total Amount Distributed from Trust Fund (in millions)	Preliminary Base Trust Fund Distribution	State Surplus Funds Added (in millions)	Final Base Trust Fund Distribution
10/15/2002	34	\$17.85	100.00%	\$0	100.00%
10/15/2003	54	\$27.16	100.00%	\$0	100.00%
10/15/2004	61	\$30.82	100.00%	\$0	100.00%
10/15/2005	82	\$46.34	100.00%	\$0	100.00%
10/15/2006	102	\$58.66	100.00%	\$0	100.00%
10/15/2007	113	\$68.13	100.00%	\$0	100.00%
10/15/2008	127	\$54.61	67.62%	\$0	67.62%
10/15/2009	135	\$31.58	34.81%	\$0	34.81%
10/15/2010	142	\$25.87	27.20%	\$0	27.20%
10/15/2011	143	\$26.18	26.64%	\$0	26.64%
10/15/2012	148	\$27.71	26.83%	\$0	26.83%
11/15/2013	148	\$29.89	30.61%	\$25.00	52.23%
11/15/2014	155	\$24.76	22.36%	\$11.40	31.46%
11/15/2015	156	\$26.29	22.14%	\$10.00	29.67%
11/15/2016	157	\$26.72	20.58%	\$0	20.58%
11/15/2017	162	\$24.05	17.20%	\$0	17.20%
11/15/2018	172	\$23.60	13.80%	\$10.00	19.01%
11/15/2019	173	\$23.77	13.90%	\$20.00	23.90%
11/15/2020	176	\$55.67	28.63%	\$0	28.63%
11/15/2021	177	\$78.48	39.37%	\$10.00	43.84%
11/15/2022	187	\$64.63	30.32%	\$20.00	38.51%

Five Year Average 31% Match

Grand Total Statewide CPA Trust Fund Distribution: \$899.17 million

<https://www.communitypreservation.org>

Community Preservation Act - Fund Uses

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

Chart 1
COMMUNITY PRESERVATION FUND ALLOWABLE SPENDING PURPOSES (G.L. c. 44B, § 5)

	OPEN SPACE	HISTORIC RESOURCES	RECREATIONAL LAND	COMMUNITY HOUSING
DEFINITIONS (G.L. c. 44B, § 2)	Land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and salt water marshes and other wetlands, ocean, river, stream, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve and land for recreational use	Building, structure, vessel, real property, document or artifact listed on the state register of historic places or determined by the local historic preservation commission to be significant in the history, archeology, architecture or culture of the city or town	Land for active or passive recreational use including, but not limited to, the use of land for community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field Does <u>not</u> include horse or dog racing or the use of land for a stadium, gymnasium or similar structure.	Housing for low and moderate income individuals and families, including low or moderate income seniors Moderate income is less than 100%, and low income is less than 80%, of US HUD Area Wide Median Income
ACQUISITION Obtain property interest by gift, purchase, devise, grant, rental, rental purchase, lease or otherwise. Only includes eminent domain taking as provided by G.L. c. 44B	Yes	Yes	Yes	Yes
CREATION To bring into being or cause to exist. <i>Seideman v. City of Newton</i> , 452 Mass. 472 (2008)	Yes		Yes	Yes
PRESERVATION Protect personal or real property from injury, harm or destruction	Yes	Yes	Yes	Yes
SUPPORT Provide grants, loans, rental assistance, security deposits, interest-rate write downs or other forms of assistance directly to individuals and families who are eligible for community housing, or to entity that owns, operates or manages such housing, for the purpose of making housing affordable				Yes, includes funding for community's affordable housing trust
REHABILITATION AND RESTORATION Make capital improvements, or extraordinary repairs to make assets functional for intended use, including improvements to comply with federal, state or local building or access codes or federal standards for rehabilitation of historic properties	Yes if acquired or created with CP funds	Yes	Yes	Yes if acquired or created with CP funds

Community Preservation Act - Peer Communities

Carlisle

- Population 5,200, Ave SF Value \$1.1 million, Ave SF Tax Bill \$15,900
- 2% Surcharge, \$100,000 Residential Exemption, Adopted 2001
- Lifetime - \$7.7 million local, \$3.5 million CPA Trust = \$11.3 million
- **2022 - \$502,000 local, \$213,000 CPA Trust = \$715,000**

Sherborn

Population 4,400
Average SF Tax Bill \$17,800
Average SF Value \$991,000

Lincoln

- Population 7,000, Ave SF Value \$1.4million, Ave SF Tax Bill \$19,370
- 3% Surcharge, \$100,000 Residential Exemption, Adopted 2002/2004
- Lifetime - \$12.6 million local, \$6.3 million CPA Trust = \$18.9 million
- **2022 - \$943,000 local, \$532,000 CPA Trust = \$1.5 million**

Wenham

- Population 4,980 , Ave SF Value \$848,000, Ave SF Tax Bill \$14,700
- 3% Surcharge, \$100,000 Residential Exemption, Adopted 2005
- Lifetime - \$5.5 million local, \$3.5 million CPA Trust = \$9 million
- **2022 - \$471,800 local, \$400,700 CPA Trust = \$872,500**

Community Preservation Act - Sherborn

FY2023 Tax Data

- Average SF Tax Bill \$17,842
- Average SF Home Value \$990,663

Estimate of CPA Revenue by CPA Surcharge Percentage					
W/O \$100,000 Residential Property Exemption					
CPA Surcharge %	Basis for CPA Surcharge	CPA Surcharge Per Home	Local CPA Annual Revenue	CPA Trust Fund Distribution	Total CPA Revenue
1%	\$17,842	\$178	\$237,120	\$91,315	\$328,435
1.50%	\$17,842	\$268	\$355,680	\$136,972	\$492,653
2%	\$17,842	\$357	\$474,240	\$182,630	\$656,870
2.50%	\$17,842	\$446	\$592,800	\$228,287	\$821,088
3%	\$17,842	\$535	\$711,361	\$273,945	\$985,305

Estimate of CPA Revenue by CPA Surcharge Percentage					
W/ \$100,000 Residential Property Exemption					
CPA Surcharge %	Basis for CPA Surcharge	CPA Surcharge Per Home	Local CPA Annual Revenue	CPA Trust Fund Distribution	Total CPA Revenue
1%	\$16,041	\$160	\$213,183	\$82,097	\$295,279
1.50%	\$16,041	\$241	\$319,774	\$123,145	\$442,919
2%	\$16,041	\$321	\$426,366	\$164,193	\$590,559
2.50%	\$16,041	\$401	\$532,957	\$205,242	\$738,199
3%	\$16,041	\$481	\$639,548	\$246,290	\$885,838

Community Preservation Act - Sherborn

Potential Projects

- Sherborn Historic Society Space Needs - Preservation
- Laurel Field Improvements
- Jameson Fields and Ward J. Parks/Town Center Recreation Area Improvements
 - Fields, Tennis Courts, Pickleball Courts, Playground
- Upper Charles Rail Trail
 - Acquisition
 - Improvements
- Open Space Land Acquisition/Preservation/Protection
- Farm Pond Reservation Improvements
- Town Forest Trails, Bay Circuit Trail Connections, Bike Trails, Town Center Pedestrian Connections
- Town Hall Campus Master Plan Implementation
- Funding for Affordable Housing Trust
- Sherborn Community Center Rehabilitation/Restoration

An Overview of the Community Preservation Act (CPA)

CPA is a state law passed in 2000 that allows Massachusetts communities to conduct a referendum to add a small surcharge on local property taxes. When combined with matching funds from the statewide Community Preservation Trust Fund, this dedicated fund is used to build and rehabilitate parks, playgrounds, and recreational fields, protect open space, support local affordable housing development, and preserve historic buildings and resources.

5 facts about CPA's statewide impact (as of May 2023):

1



195

cities and towns have
adopted CPA - and 70% of
MA residents live in CPA
community.

2

The **amount raised** for community
preservation funding **statewide**:

\$3.15 billion



3

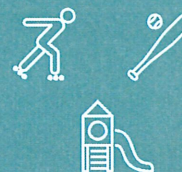


34,204

acres of open
space preserved.

3,300

outdoor recreation
projects including ball
fields, trails, and parks.



4

Housing units **created**:

10,000



Housing units **supported**:

16,000

5

6,700

historic preservation
projects.



**Community
Preservation Coalition**

Preserving our past. Building our future.

 www.communitypreservation.org

 @CPA_Coalition

 CPA Coalition

Community Preservation Act Revenue Analysis

9/23/2023

Town of Sherborn

FY2023 Tax Data

Average Single Family Tax Bill	\$	17,842
Tax Rate	\$	18.01
Average Single Family Home Value	\$	990,663
Single Family Parcel Count		1,329

<https://dls.gateway.dor.state.ma.us/reports/rdPage.aspx?rdReport=CommunityPage&rdLinkDataLayers=CommunityPage&rdRequestForwarding=Form>
Statewide CPA Trust Fund Distribution History

Year	Final Base Trust Fund Distribution	
2018		19.01%
2019		23.90%
2020		28.63%
2021		43.84%
2022		38.51%
Average		30.78%

https://www.communitypreservation.org/trustfund#anchor_trustfund
Estimate of CPA Revenue by CPA Surcharge Percentage**W/O \$100,000 Residential Property Exemption**

CPA Surcharge %	Basis for CPA Surcharge	CPA Surcharge Per Home	Local CPA Annual Revenue	CPA Trust Fund Distribution	Total CPA Revenue
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Community Preservation Coalition

Preserving our past. Building our future.

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[Home](#)

Information on Individual CPA Communities

This report displays detailed information on each community's CPA program, including the local Community Preservation Committee bylaw/ordinance, adoption data, and revenue history. Use the dropdown menu located below to select a community's report.

 Choose Municipality Name ▾

Municipality Information

Municipality Name
Carlisle

CPC Website
[CPC Website](#)

CPC Bylaw/Ordinance
[Bylaw/Ordinance](#)

CPA Program Details

Date Adopted
05-22-2001

Current Surcharge
2%

Current Exemptions
Low income, first \$100,000 - residential

CPA Elections History

	Election Purpose	Path to Ballot	Surcharge %	Exemptions	Election Date	Status	% Yes	% No	Current Status
	Initial Adoption	Legislative Body Vote	2%	Low income, first \$100,000 - residential	05-22-2001	Pass	54%	46%	✓

CPA Revenue History

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2002	\$214,533			\$214,533
	2003	\$238,618	\$214,533	100%	\$453,151
	2004	\$262,655	\$238,618	100%	\$501,273
	2005	\$270,723	\$262,655	100%	\$533,378
	2006	\$282,735	\$270,723	100%	\$553,458
	2007	\$297,471	\$282,735	100%	\$580,206
	2008	\$370,160	\$297,471	100%	\$667,631
	2009	\$328,541	\$250,303	67.62%	\$578,844
	2010	\$341,887	\$114,381	34.81%	\$456,268
	2011	\$351,402	\$93,000	27.2%	\$444,402
	2012	\$358,206	\$93,610	26.64%	\$451,816
	2013	\$358,879	\$96,122	26.83%	\$455,001

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2014	\$383,682	\$187,425	52.23%	\$571,107
	2015	\$399,401	\$120,726	31.5%	\$520,127
	2016	\$420,847	\$118,424	29.7%	\$539,271
	2017	\$437,830	\$86,597	20.58%	\$524,427
	2018	\$459,253	\$75,316	17.2%	\$534,569
	2019	\$472,318	\$87,326	19.01%	\$559,644
	2020	\$492,793	\$112,971	23.92%	\$605,764
	2021	\$486,682	\$141,070	28.63%	\$627,752
	2022	\$502,396	\$213,360	43.84%	\$715,756
	2023	\$0	\$193,480	38.51%	\$193,480
TOT		\$7,731,013	\$3,550,846		\$11,281,859

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Information on Individual CPA Communities

This report displays detailed information on each community's CPA program, including the local Community Preservation Committee bylaw/ordinance, adoption data, and revenue history. Use the dropdown menu located below to select a community's report.

Choose Municipality Name ▾

Municipality Information

Municipality Name
Lincoln

CPC Website
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CPC Bylaw/Ordinance
[Bylaw/Ordinance](#)

CPA Program Details

Date Adopted
11-05-2002

Current Surcharge
3%

Current Exemptions
Low income, first \$100,000 - residential

CPA Elections History

	Election Purpose	Path to Ballot	Surcharge %	Exemptions	Election Date	Status	% Yes	% No	Current Status
	Surcharge Increase	Legislative Body Vote	3%	Low income, first \$100,000 - residential	03-29-2004	Pass	64%	36%	✓
	Initial Adoption	Legislative Body Vote	1.5%	Low income, first \$100,000 - residential	11-05-2002	Pass	62%	38%	<input type="checkbox"/>

CPA Revenue History

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2002				\$0
	2003	\$203,365			\$203,365
	2004	\$220,879	\$203,365	100%	\$424,244
	2005	\$461,436	\$220,879	100%	\$682,315
	2006	\$500,519	\$461,436	100%	\$961,955
	2007	\$517,657	\$500,519	100%	\$1,018,176
	2008	\$519,317	\$517,657	100%	\$1,036,974
	2009	\$549,120	\$420,180	80.91%	\$969,300
	2010	\$560,303	\$246,798	44.94%	\$807,101
	2011	\$609,084	\$195,935	34.97%	\$805,019
	2012	\$640,827	\$206,190	33.85%	\$847,017

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2013	\$634,835	\$216,875	33.83%	\$851,710
	2014	\$662,192	\$424,815	66.92%	\$1,087,007
	2015	\$687,180	\$266,411	40.2%	\$953,591
	2016	\$731,737	\$259,639	37.9%	\$991,376
	2017	\$747,803	\$191,804	26.21%	\$939,607
	2018	\$770,623	\$164,520	22.03%	\$935,143
	2019	\$793,845	\$197,220	25.59%	\$991,065
	2020	\$897,402	\$253,236	31.9%	\$1,150,638
	2021	\$918,568	\$336,984	37.55%	\$1,255,552
	2022	\$942,752	\$532,005	57.92%	\$1,474,757
	2023	\$0	\$481,330	51.06%	\$481,330
TOT		\$12,569,444	\$6,297,798		\$18,867,242

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Information on Individual CPA Communities

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 Choose Municipality Name

Municipality Information

Municipality Name
Wenham

CPC Website
[CPC Website](#)

CPC Bylaw/Ordinance
[Bylaw/Ordinance](#)

CPA Program Details

Date Adopted
05-07-2005

Current Surcharge
3%

Current Exemptions
Low income, first \$100,000 - residential

CPA Elections History

	Election Purpose	Path to Ballot	Surcharge %	Exemptions	Election Date	Status	% Yes	% No	Current Status
	Initial Adoption	Legislative Body Vote	3%	Low income, first \$100,000 - residential	05-07-2005	Pass	77%	23%	✓

CPA Revenue History

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2002				\$0
	2003				\$0
	2004				\$0
	2005				\$0
	2006	\$223,738			\$223,738
	2007	\$237,714	\$223,738	100%	\$461,452
	2008	\$264,571	\$237,714	100%	\$502,285
	2009	\$283,758	\$264,571	100%	\$548,329
	2010	\$286,131	\$178,251	62.82%	\$464,382
	2011	\$283,365	\$140,007	48.93%	\$423,372
	2012	\$288,726	\$138,252	48.79%	\$426,978
	2013	\$285,234	\$141,644	49.02%	\$426,878

	Fiscal Year	Local Surcharge	Total Trust Fund Distribution	Percentage	Total Revenue (Local Surcharge + Distribution)
	2014	\$295,150	\$285,234	100%	\$580,384
	2015	\$309,891	\$184,094	62.4%	\$493,985
	2016	\$324,682	\$179,706	58.2%	\$504,388
	2017	\$343,949	\$131,609	40.53%	\$475,558
	2018	\$358,884	\$115,550	33.69%	\$474,434
	2019	\$385,649	\$147,891	41.21%	\$533,540
	2020	\$411,549	\$191,808	49.74%	\$603,357
	2021	\$450,611	\$243,665	59.21%	\$694,276
	2022	\$471,770	\$400,744	88.93%	\$872,514
	2023	\$0	\$367,527	77.9%	\$367,527
TOT		\$5,505,372	\$3,572,005		\$9,077,377

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