

FINAL REPORT ON PROPERTY TRANSITIONS

The Council on Aging, in its continuing efforts to make Sudbury an attractive place for Senior Citizens, conducts occasional surveys.

In 2007 the Council sent questionnaires (see appendices) to every homeowner over the age of 50 who sold a home, or placed a home on the market. A parallel questionnaire was mailed to everyone who purchased a new home in Sudbury.

DISCUSSION

This study was not undertaken to prove or disprove any particular hypothesis, but rather to collect information that might be helpful in the future. There have been a number of approaches to tax relief for seniors, and the proponents have often offered different sets of 'facts' to bolster their proposals.

The Property Tax Equity Research Committee (PTERC) -- on which the two men involved in this study participated -- showed pretty clearly that seniors are mobile and that their pattern of moving in and out in rough proportion to the school-age of their children is not a new development, but has been the norm for many years. What wasn't clear is why they moved, or where they moved.

It's also generally agreed that the senior exodus has a cost to the town; childless families contribute more to the town in property tax than their services cost. When they leave, younger families move in with children, and cost more in taxes than they contribute. We thought it would be helpful to confirm that and see if it is possible to "put a number" on it.

Two series of survey-instruments were developed --- one for families moving into town and the other for those leaving. Drafts were circulated to the Boards of Selectmen and the Council on Aging, and test questionnaires were mailed to a few dozen families in late 2006. Based on the responses and suggestions we received, final survey instruments were prepared for use in calendar year 2007.

Approximately 20% of questionnaires were returned; 27/122 buyers and 51/231 sellers. What follows is based on those responses

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FINDINGS

. Probably the clearest finding was a confirmation of the effects of the schools on families moving into and out of Sudbury. The “Sound-bite” finding, to be up-to-date, would be that families that left had each educated about 1.5 children, on average, and had no children when they left. Families arriving have about 1.5 children to educate, and are still in their childbearing years.

Families who are arriving in Sudbury state the schools attracted them (23 out of 27 said schools were a very important reason they came). Only two out of 50 families who are leaving have a school-age child, and 36 of the fifty listed the schools as one of the things they liked about living here.

Comments about the school experience are also positive, but less unanimous .We are appending each comment to this report so that readers can experience them in all their richness and variety. A quick subjective summary of the comments rates the schools:

Good	25
Okay	5
Bad	4

WHERE THEY'RE GOING?

A surprising finding was how few Seniors are moving far away. Although some of our neighbors are really leaving (Australia, for instance), more than half are staying nearby. Six found appropriate homes in Sudbury, and 19 are staying in Metro West. Surprisingly, only four are headed for Cape Cod, and three for “Warmer Climes”. Five are opting for City life in Boston, and four are moving North (North Shore, New Hampshire or Maine).

The families who are staying nearby differ significantly from those who are leaving the area:

	<u>Sale Price</u>	<u>Age of oldest</u>	<u>Yrs in Sudbury</u>
Moving Away	\$846,000	66.1	27.6
Stay in Metrowest	\$626,000	76.1	37.1

This might be the most important finding in the survey. It would suggest that nineteen families *had to leave Sudbury* to find suitable housing for their retirement years (emphasis ours). This can be seen as a criticism or an opportunity, and leads to the next question.

WHY THEY ARE LEAVING?

Responses formed a powerful cluster:

House no longer appropriate	29
Kids gone	19
Different lifestyle	19
Less Expensive lifestyle	22

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These questions and responses overlap, reflecting a weakness in the questionnaire, but they also paint a pretty clear picture. Our community has changed from a farming community to a child-rearing community. Builders and developers have created residences aimed at attracting young families, and they have been successful. Families are attracted to Sudbury for the schools, the attractive homes, the semi-rural setting, and all the amenities one wants for raising a family.

After the children leave, the attraction isn't so strong, and for many the benefits cease being worth the cost. Less expensive, more appropriate housing is available elsewhere.

Taxes play a part, as one can find by reading the comment sections that follow. As one ages the quarterly appearance of a tax bill becomes more and more upsetting. After paying property taxes for 20-30 years, a family understandably feels it has done its part, and the property tax bill seems an unreasonable burden. That said, it was not clear that a change in property taxes would have changed the decisions of a significant number of seniors. The respondents had clearly done some serious thinking, and tried to answer honestly. We can only report their responses; the reader will have to reach his or her own conclusions.

A WORD ABOUT STATISTICS

The questionnaires were tabulated by hand, using an excel spreadsheet. The analysis reflects the mathematical abilities of a couple of volunteer senior citizens; no claim of statistical significance is made.

Dave Levington
Bill Maloney
March 21, 2008

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SUMMARY OF RESPONSES FROM IMMIGRANTS (HOUSES BOUGHT)

122 questionnaires were mailed, and 27 responses received (about 20%).

AGE OF OLDEST RESPONDENT

25-40	16
41-50	8
50+ or blank	3

MOVED FROM

Other Sudbury	2
Inside 128	10
Other Mass.	7
Out of State	6

WHAT ATTRACTED YOU TO SUDBURY?

	<u>Very Much</u>	<u>Somewhat</u>	<u>Not Important</u>	<u>Blank</u>
Liked the House and Value	18	8	0	1
Country Character	16	9	1	2
Schools	23	2	0	2
Church/Synagogue	1	12	11	2
Library	2	12	10	1
Parks, Playing fields	10	14	1	2
Near work, good commute	12	9	4	1
Near friends and family	5	10	9	2
People, friendly community	8	11	4	4
Other (see narrative)				

NUMBER OF CHILDREN

0	5	
1	9	
2	9	
3 or more	4	Average, about 1.5 and expecting

HOW MANY WILL ATTEND SUDBURY PUBLIC SCHOOLS

See narrative section. This question resisted tabulation. Most answered "All, until they graduate". There are currently 40 children, not all of school age. Of the respondents with no children, one was age 65, the others all of childbearing age.

HAVE YOU THOUGHT ABOUT WHERE YOU MIGHT LIVE WHEN YOU RETIRE?

Not at All.	14
Vaguely	11
Definitely	2

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HOW LIKELY IS IT THAT YOU WILL STAY IN SUDBURY?

Not Likely	9
Possible	14
Very Likely	0
Blank	4

WHAT MAKES A “NICE PLACE TO RETIRE”

See narrative section	
Weather	9
Services	2
Transportation	3
Senior Activities	1
Near Family	5

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NARRATIVE SECTIONS - IMMIGRANTS

Nice place to retire
Weather ; close to family ; Senior Activities ; walkability
Weather, close to children
Friendly community ; Excellent Medical facilities ; Scenic Parks ; Recreation
Weather, close to family
Active Seniors, Sr. Center
Taxes
Weather, good community, low cost of living
Weather, Community, Family
Beauty, affordable, cultural amenities
local services/support, near friends/family, medical care, affordable
Quiet setting, Near a downtown shopping centre, near major roads, weather
good quality of life, easy lifestyle, weather
Cultural Activities, Nature, Easy commute to airport (visit family)
warm, low cost of living
warm, lower taxes, nice, friendly people, active community
weather, recreation facilities
low tax, big land/property

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How Many Years in School?
All our children (1 + ??)
Until graduation
Older 3 yrs; younger at least 3 yrs -- more if mom remarries
All
All
All
They are past school age
All
All
2 to 12
2 x 13 hopefully
N.A.
both for twelve (=24)
Our child will attend public schools
All three for twelve yrs (Some already too old - more like 32)
3 for at least some
6/10
26
All of them
Both thru hs

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All k through HS
Depends on length of husband's project.
All k through HS
24
All

Anything Else?
Go back to midwest (e.g. PA)
Had wonderful support from Noyes School PTO after pancreatic surgery several years ago. First Parish community was equally supportive through my recovery and through a painful divorce. I am "torn" to stay or leave Sudbury at retirement since it has many happy and sad memories for me.
Wife and Husband both grew up here and went to public schools
Looking forward to a happy, healthy life in this town.
Taxes are very High. We still have to pay for trash collection & dumping. Once children are out of public schools -- the taxes you pay are not well balanced with the services you receive.
Make town more pedestrian friendly! Shopping areas too automobile oriented. Ex. Strip mall Starbucks -- could have been done much better with trees, benches, courtyard.
Lower property taxes would help.
Purchased last home as 10-15 yrs. Husband relocated to Boston. Not ready to think about retirement. But, would be happy to be in Sudbury.
Not sure, as the taxes are so high here it doesn't seem worth it.

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SUMMARY OF RESPONSES FROM EMIGRANTS (HOUSES SOLD OR FOR-SALE)

231 questionnaires were mailed out and 51 were received (about 20%).

Age of oldest adult in responding household

50-59	10
60-69	16
70-79	13
80+	6
Blank	5

Years you have lived in this home

0-9	6
10-19	7
20+	34
Blank	1

Where are you going?

Stay in Sudbury	6
Sunny Climes	3
Boston area	5
Other Metro West	19
Cape Cod	4
North Shore, ME, NH	4
Other, Don't Know	13 (Australia, Texas, Boise, Plymouth, San Antonio)

What did you like about Sudbury?

	<u>Very Much</u>	<u>Somewhat</u>	<u>Not Important</u>	<u>Blank</u>
Country Character	37	10	3	1
Schools	36	3	6	6
Church, Synagogue	21	14	10	6
Library	29	19	2	1
Parks and Fields	19	17	9	6
Near work, good commute	21	17	6	5
Near family and friends	21	20	6	3
People	22	20	3	6
Our Home	33	11	1	5
Other	(8)			

View, safety, peaceful surroundings, fire/police, affordability (1961), relatively safe hospitable community, walking distance to stores, swimming pool

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What did you dislike? (19), See narrative section

Water, taxes(3), traffic (3), transportation, change in community (5), form of government (2), no shopping center, long way from Boston

Why are you moving?

	<u>VERY IMPORTANT</u>	<u>SOMEWHAT IMPORTANT</u>	<u>NOT IMPORTANT</u>	<u>BLANK</u>
House no longer Appropriate	29	6	4	10
Kids gone	19	6	9	16
Different lifestyle	19	1	17	23
City	3	5	10	32
More rural	1	5	10	34
Warmer	4	2	11	33
Less Expensive lifestyle	22	4	4	20

Other (28), Job change (4) High taxes (6), divorce (1) climate (1) near family (4), age (2), easier lifestyle (8), two houses too much (1), back to roots (1), oil spill (1), widowed (1), downsize (1), health (2), unhappy in Sudbury (1). See Comment section.

How many school-age children do you have still at home?

One	3
Two	2

Note: Out of seven children, three are staying in Sudbury, one “can’t afford to stay”, and two are moving because of job-changes).

How many of your children attended public school while you lived here, and for how many years?

This question also challenged tabulation. Our best summary suggests a total of 911 student-school-years, or an average of 18 school-years per household.

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NARRATIVE SECTIONS – (EMIGRANTS)

What did you like most about Sudbury? (other)
Living on pond -- view
Safety
Peaceful Surroundings - name of my street --Singing Hill Circ --(I am a singer)
Fire and Police
Affordability (1961) MORE house for less money.
Relatively safe hospitable community
Swimming Pool
Walking distance to stores and restaurants

What did you dislike?
Water
High taxes. Total school focus. Community not committed to residents
Traffic on Rt. 20
I love Sudbury
Taxes
Taxes, driveway plowed in, walk & bike path, go to dump to recycle
No public transportation; No diversity
Traffic & looks of Route 20
The changes in residents values, attitudes & behaviors. More recent newcomers behave as though they're entitled!

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We liked Sudbury
Change over the years to very upscale.
Nothing
Obselete Town Meeting Form of Government, Rt 20 Zoning – or Lack Thereof General attitude of residents --"all for the schools". "Nothing for the community at large."
Lack of a Shopping Center
The "attitudes" of recently-arrived residents. Not the same Sudbury of the 60s/70s

Why are you moving?
Job Change
High Tax?
Divorced. Husband's estate selling house, I am staying in Sudbury
Real Estate Taxes - Need warmer climate - To be near family
Age. Easier Lifestyle
Children gone; house too big
Can't take care of two large houses any longer. The one in "OTAIN?" won out.
No family. Here for a job. Now retired or semiretired. Back to roots. Tired of winter, chores.
I could not afford the taxes and am very sad to leave my house.
Oil spill in my basement & my sensitivity to petroleum fumes. Affordable apt while selling home.
widowed
See last column
Downsizing

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Husband has job in CA
High maintenance house & gardens. To live in a town with a lower tax rate.
Close to work
Less taxes, smaller and more affordable
Change, ocean, golf
Closer to family after my husband's death. A 50 year old house is too much to care for.
Found a condo development I loved
Health
Out of state job opportunity
Seeking one-floor living
Did not feel it was a town where I wanted to grow old - to retire. Little community spirit.
We were offered a house, with more square footage than Barton Dr. home at much-below market price. In addition, the tax rate is much lower in Hudson,

Children's experience in schools
Daughter needed more structure - tuitioned out to another town, more monies
Some good; some not-so good; we were happy overall
NA
OK but LS environment too relaxed/open. Lincoln-Sudb & Drugs Bury; Supt in ivory tower.
Excellent (except Curtis)
Some good some not so good I the late 70's. One accepted at Harvard & MIT
Excellent

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NA
We loved the schools; loved the town; loved our friends; life in Sudbury idyllic
Children benefited greatly from activities the schools offer, especial the athletics
Both our children did well in school & were well prepared for college
Excellent for both children
Excellent education. Outstanding teachers at elem and HS--especially HS which had some retired college teachers. Great counseling for college and personal. DR. JOHN RITCHIE IS PERHAPS ONE OF FINEST EDUCATORS IN THE US.
Very poor fit. Either too bright or slow on non conformist
Our 4 children had a wonderful education in Sudbury Schools. All went to college: 2 have MA in education 1 in medicine 1 has own Business.
Elem: excellent. Middle School: fair. High School: fair.
LS in excellent school
Very involved with schools all through. Good experience-- but if we had it to do over, Private School
When we moved to Sudbury our two older children were ages 8 & 7. We were concerned that the Sudbury Schools would not meet the Lexington School system standard. Over time, Sudbury schools became good to excellent. Overall, our children received a very good education, particularly at L-S
Elem: excellent. Middle School: very poor. High school: too big.
N.A.
I was very happy with the public schools, but that was a long time ago. I do think special needs is not that good. I have a grandchild in the program
Pleased with K-8 system
Generally favorable. My daughter loves the high school.
Very Positive. Helped them go to college
Both children received a good education and went on to college
Great experiences

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Schools were excellent and met all our childrens' needs and our expectations
It was excellent
All four children had positive experiences in the public schools and went on to college and post-graduate degrees.
Friends & Neighbors have removed their children from the schools because of the disturbing culture, curriculum.
excellent
We were concerned about moving from Lexington to Sudbury in 1961, because we had no data re Sudbury Schools. Over the years the schools became better and better. Our children received an excellent education.
N/A
Very uncomfortable - They were either too bright or too slow not geared to meet their needs.
Excellent experience -- wonderful teachers prepared our children for life.
We have great schools. L-S is a bit too liberal for my taste

About Schools - other
One student left for grades 5-8. Back for HS.
We were always proud of the schools and always supported them
Mostly private schools
2 for 4 yrs at Catholic HS
<u>Very</u> disturbed by their culture --- from K thru 12.
I never cost a dime to the town. Re: Kids in school did not get much in return except higher taxes.
Sudbury Valley -- 4ch for 4 yrs

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How improve senior's experience?
Taxes would have changed our mind once children were a little older
Reduce Property tax for SS
NA
Change the real estate tax situation. Show some responsibility for seniors.
Property taxes are prohibitive!
Seniors who have paid for schools twice should be exempt from that portion of tax.
Lower Real Estate Taxes. I might possibly have stayed longer.
Taxes were too high -- housing options that were affordable not available.
We always enjoyed Sudbury and felt that Senior Ctr. did a good job: courses, trips
I'm renting a condo in Hudson. If I had found one in Sudbury I would have stayed. But in a year I move to join my son in Calif.
There were no opportunities to downsize and lower taxes.
Sudbury was getting too expensive. Don't believe any changes would have made a difference.
Wanted to be closer to Boston
Would not have stayed: not New Englanders. Suggest more senior housing and senior tax breaks. Town needs seniors to be vital part of town.
Tax break -- can it be done for me please so I don't have to leave?
More affordable housing in apartments not requiring low income and long wait. More public transport, better senior vans go to more locations
Lower property taxes for seniors.
I do the "Fit For the Future" (will continue) Sudbury has a very good "Senior Center"
Public transportation; more ethnically & socio-economically diverse -- if you don't fit profile of white, upper income, nuclear family you don't feel comfortable & services/activities are not geared to you

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Lower property taxes
Route 20 -- traffic -- Appearance of Sudbury from Wayland line to Union Ave Embrassing (sic).
We might have stayed in Sudbury longer if Frost Farm had been better. (We had the option initially to buy there, but it looked risky from the start!) Grouse Hill looks better, but is not financially better for us than what we have now. None of these factors can be changed by the town's actions.
No
Containment of tax increases. Availability of attractive/affordable homes.
Give Seniors a tax break
Lower taxes for seniors. More town services - dump etc.
More ethnic and social economic diversity
Keep more seniors in town.
Reasonably priced condominiums. It was hard to leave Sudbury, but I am now happy nearer my family. The Pinehills is a great place to live
better tax rate. Condos in town.
To downsize in Sudbury is hard to do as the older smaller homes are being torn down for replacement by large homes. Those over "55' housing is very pricey, so in order to pull equity out of your home, moving to a less expensive area is the only option.
None
Route 20s Traffic
We love the town and would make every effort to stay. We have a second home in Florida so a situation here would have to meet our summer needs.
A tax break for Seniors - better public transportation.
With our children all at college or out of college and on their own -- we don't need as large a house. We also decided to lease a property near by while we considered a range of alternatives for our next permanent residence.
Some tax break for Seniors. The "employment" opportunities for Seniors provide some relief, but only to 50 participants. (The town of Sudbury owes me \$750.00 for the work I did for Mark Thompson last year.)
No

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Better transportation, senior van too limited. Town's refusal to make tax adjustment when my house was uninhabitable due to oil spill. No housing available. I am on the list (Masquadeket) for over two years but when I sold my house I was placed at the end of the list.
We are staying in Sudbury. Bought a condo. Hope to become more active in various clubs -- RMA, Red Hat, Villagers, etc.
No. Lower senior tax rate so more school age children don't come in to raise tax rates.
Sudbury needs more over 55+ communities. We pay taxes & support the town & don't drain the schools.

Would you have stayed with tax relief?	Other Thoughts?
A significant tax-relief with a realistic means test might help. Was a major reason we left but not the only one.	Town is vastly different from 1973. HS cost, walking trail, 5 overrides.
Not relevant	
Reduce prop Tax for SS accdg to time in Town before senior.	Improve water quality Lots more!
N/A but I totally support tax savings for seniors. Balanced community very important.	
Probably	
	Taxes too high- no concern for fixed income folks; Acre lot too much to maintain
Possibly, too late now & Significant property exemption	
Luckily still here to do my business. For others, deduct overrides for schools only. Thy still need all other town services.	Many overrides wouldn't pass if TM were on Saturday so seniors could attend. Evening meetings too long, too dark, no rides, etc.
One reason for leaving Sudbury and moving to Australia. It was a serious factor in the decision to leave.	I primarily moved to Australia to be nearer my family as I get older. Now 73-74 in June. If I did not move now I would be too old to do so before long and to develop a new life closer to my children and grandchildren.

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We have moved to "over 55 community" in Hudson. Doubt anything comparable in size or taxes in Sudbury	COA services in Sudbury beyond compare! Especially found the Shine Counselor Superb!
No	We were very pleased with our years in Sudbury.
It would not have mattered. House was just too big after kids left.	
Taxes do need to be reduced here	
Possibly, but there was no housing comparable to what we purchased	
Tax relief for the elderly is not in the cards but it would not have made a difference.	
Not a consideration	Sudbury offers a wonderful life style. Enjoyed our tenure
Would have helped but we never planned to stay. We bought a very large house and did not want to keep it. Many contemporaries wanted to downsize and stay. Taxes are a big consideration. Fixed income/retirement is a problem.	
YES! Lower to \$4-5000.	
Relief from taxes while home was being repaired and rendered habitable. Takes additional time because of my sensitivity to petroleum. Necessary to pay rent and taxes.	The oil spill in Oct. 2005 changed my life. Town offered no help or advice other than the fireman & police. Senior ctr became my refuge, the one place where I could express my feelings and needs. Sudbury did grant a \$500 rebate after many calls and several forms. Health dept offered no support for self or neighbors.
Cutting property taxes in half	
Taxes had nothing to do with us leaving Sudbury. It is because of my husband's health.	Our daughter-in-law is a Nurse Practitioner. She will help me care for my hubby! Our son & daughter-in-law are putting an in-law apartment for us in W. Concord.
	The middle & high school are excellent for achievers - - difficult environments for students with learning issues.

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Lower property taxes	
1) Would not apply to us. 2) Take care how our town appearance NO PRIDE -- dump area -- corner Union Ave, Corner of Nobscot, Horrendous.	We loved living here. Children were very involved in town sports. Seems there is not enough to keep town looking as it used to. Why would we continue to stay in a place AND pay the taxes and it continues to look worse. If we have someone visiting we tell them direction via Route 27, very relaxing and the way the town should look!
I don't see any constitutionally legal tax relief scheme that would make much difference. As long as schools are supported by taxes based on real estate assessments, people with no kids in school will pay more; those with school kids will pay less (than actual cost).	When we came to Sudbury, we could get a lot of house for the money. Our new neighborhood was above median house price for the town. Over the years, the neighborhood has remained stable, the houses well-maintained, but the sale price of the neighborhood is hundreds of thousands of dollars below the median, and the taxes are on average over \$7000 a year. (And now, as we sell, our house will certainly be home for a school kid (or more), that will more than consume that tax bill in education costs alone.)
No	I think some Sudbury Parents push their children too early to be extremely competitive. I also think there is a fair amount of "cattiness" in the town.
Possibly. Minimum of \$2000 plus protection from further increases (See Florida Homestead Act.)	
More affordable housing, like cheaper condos. Almost everything built is almost 1 million. The affordable condos have too many strings attached.	Frost Farm was a disaster. The Grouse Hill Condos you can't sell for much of a profit & the monthly fees are way higher than mine in Hudson. Sudbury has just become a very expensive community to live in. I sure loved it for 43 yrs and hated to leave.
	It will be difficult to afford to stay in Sudbury when faced with fixed retirement income and to keep to lifestyle of former years. We live in a town where the end result is "Never say No: on spending" We don't "fix up" or just "make do". Not such a realistic example for our young people, don't you think? Nor affordable for the old! Too bad! Very Sad!
Probably would not stay longer but I know there is a problem for many.	
Not an issue for us now since we are directly benefitted (sic) from services supported by high taxes, mostly school quality. We might feel differently when our children	Great Comm...t ???

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leave the schools.	
I don't think we would have qualified for tax relief, but I am sure it would be helpful to those who would	We enjoyed living in Sudbury and raising our youngest child there. We now live in Concord (lease) and still use many services we used to frequent in Sudbury.
Not Applicable	I will always miss Sudbury and remember the support from friends, our Church, Ed Gottman_during my husband's illness.
I could not have stayed longer taking care of the house, even if taxes were lower.	qualify and truly wanted to remain in Sudbury. The continuous passage of budget overrides and the escalating taxes are budget breakers for the fixed income people.
Although the rising taxes were a concern it was not the reason I moved.	We moved because of ill health & a warmer climate. Could not care for a large house anymore.
135 -> 10%	No opinion other than knowing the Senior Center has a good reputation.
No	Initially (perhaps the first 20 years) we loved living in Sudbury. Over the past 20 years, our former neighborhood was "deteriorating" (Barton Dr. & surrounding streets). Residents were <u>not</u> maintaining their property. We found this situation to be discouraging. The "character" of Sudbury has changed, because many of the younger families feel/act "entitled" and they generate an "air of superiority" resulting in "snobbishness". Sudbury population is <u>far removed</u> from the farmers who established the town. We appreciate living in an area now where there are, at least a few, <u>farmers!</u>
Yes - Cost of living and Town services too high	It seems that on one has time enough to care about people's lives - just regulations.
Lowering the taxes for seniors would certainly help, but, for us, it's more that the home is too large and the expense of maintaining it over-ride tax consequences.	I wanted to live in a beautiful home even after retirement. Apartment living was not for me. Mahoney Farms was what made us choose to stay here. We need to keep retirees supporting this town. All residents need to work together to keep people from choosing other towns to live in.
Fewer tax overrides & more judicious budget management in our schools. These items are out of control. The tax reliefs offered do not benefit those at "middle-income" levels. Means testing appears to cap at poverty level.	

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<p>I don't think it would have made much difference to our length-of-stay in Sudbury, given that we were offered such a spectacular home at a below market price. However, we might not have been looking at real estate if the tax rate load had not been rising steadily.</p>	
<p>Did not affect decision</p>	
<p>I had to rent an apartment & pay taxes in Sudbury even though I could not live in my home while the oil spill was cleaned up (~ 1 yr) and afterwards when I found I was too sensitized to ever live there again. No one in Sudbury offered any help, not even the health dept.</p>	
<p>Yes. Some reduction or at least a deferment until you sell.</p>	
<p>I would stay. I could afford it but health reasons was the reason I left.</p>	
<p>Does not apply</p>	
<p>I could have stayed if I felt the town (mostly younger residents/families) had a greater spirit of belonging to a community. It would have taken a tax break for seniors -- or people who did not use the schools. Now the Town has a new family in my house!!!</p>	
<p>Taxes almost doubled in the time we lived in town -- lower taxes are always preferable.</p>	

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APPENDICES

Letter to sellers

Questionnaire to sellers

Letter to new buyers

Questionnaire to buyers

Excel file of Emigrants' responses

Excel file of Immigrants' responses

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[LETTER TO SELLERS]

SUDBURY SENIOR CENTER

40 Fairbank Road • Sudbury, Massachusetts • 01776-1681

Phone: (978) 443-3055 • Fax: (978) 443-6009 • E-mail: senior@town.sudbury.ma.us
Town of Sudbury, Massachusetts

Dear Friend of Sudbury,

The Sudbury Council of Aging is concerned about the quality of life enjoyed by Senior Citizens in Sudbury. We are asking you, and others who have recently sold their homes in Sudbury (or put their homes on the market), to provide us with information and advice about how to make Sudbury a more welcoming community for mature residents.

We ask that you answer the questions that follow as honestly and completely as you can. At the end of the form you will find space to add anything you'd like to tell us that doesn't 'fit' the questionnaire.

The information we gather will be summarized and reported, but no individual person's responses will be identifiable. All results will be published and available to all on the Council's website.

Thanks you in advance for your assistance.

Sincerely,

SUDBURY COUNCIL ON AGING

David L. Levington

FINAL REPORT ON PROPERTY TRANSITIONS

[SURVEY TO SELLERS]

How many years did you live in the house you recently sold? _____ years

How many years did you live in Sudbury? _____ years

Where are you moving to?

_____ Staying in Sudbury _____ Other Metro-West Community

_____ Sunny Climes (FLA, AZ, etc) _____ Cape Cod

_____ Boston area _____ New Hampshire/Maine

_____ Other, please identify _____

What did you like most about Sudbury? What did you enjoy most while you lived here. Please mark as many as apply.

	<u>VERY</u> <u>IMPORTANT</u>	<u>SOMEWHAT</u> <u>IMPORTANT</u>	<u>NOT</u> <u>IMPORTANT</u>
Country-Character, Beauty	_____	_____	_____
Schools	_____	_____	_____
Church/synagogue	_____	_____	_____
Library	_____	_____	_____
Parks and playing fields	_____	_____	_____
Near work, good commute	_____	_____	_____
Near family and friends	_____	_____	_____
People	_____	_____	_____

FINAL REPORT ON PROPERTY TRANSITIONS

Our Home _____

Other _____

What did you dislike, or like least about Sudbury?

Why are you moving?

	<u>VERY</u> <u>IMPORTANT</u>	<u>SOMEWHAT</u> <u>IMPORTANT</u>	<u>NOT</u> <u>IMPORTANT</u>
House no longer appropriate	_____	_____	_____
Kids are gone	_____	_____	_____
Wanted a different lifestyle	_____	_____	_____
City	_____	_____	_____
More rural	_____	_____	_____
Warmer	_____	_____	_____
Less Expensive	_____	_____	_____

Other:

About the Schools

Please tell us about your children.

How many children have you? _____

FINAL REPORT ON PROPERTY TRANSITIONS

Children living home of school age _____

Children who attended public school while you lived here _____

Sudbury Schools (K-8) _____ children for _____ years

LS/Minuteman (9-12) _____ children for _____ years

Other _____ children for _____ years

Please tell us your opinions of your children’s experiences in our schools.-

Staying in Sudbury

We are interested in ways to improve the ‘Senior’ experience so families will stay in Sudbury longer. Can you offer any suggestions? What changes can/could the Town make? Are there changes that would have led you to stay in Sudbury longer?

Regarding Taxes in particular

There have been many attempts to offer tax-savings to Seniors. In your own case, can you say whether or not you would have stayed in Sudbury longer if there was some level of tax-relief? If so, what would it have “taken” to make you stay?

FINAL REPORT ON PROPERTY TRANSITIONS

Other thoughts you'd like to share?

Please tell us about yourself /selves(optional)

___Male ___Age ___Female ___Age

There's no need to sign this. However you should know that your comments, besides being tabulated, might be quoted (anonymously of course) if we feel they will help others understand why folks leave Sudbury and why they might stay.

THANK YOU IN ADVANCE!!

FINAL REPORT ON PROPERTY TRANSITIONS

[LETTER TO BUYERS]

SUDBURY SENIOR CENTER

40 Fairbank Road • Sudbury, Massachusetts • 01776-1681

Phone: (978) 443-3055 • Fax: (978) 443-6009 • E-mail: senior@town.sudbury.ma.us
Town of Sudbury, Massachusetts

June 26, 2015

Dear Neighbor,

The Sudbury Council on Aging is concerned about the quality of life enjoyed by Senior Citizens in Sudbury. As part of our ongoing research, we are asking residents who have recently purchased homes in Sudbury for information about yourselves, your families, and your reasons for moving here. A parallel survey is being conducted among families who are leaving Sudbury.

We realize that you are probably not Senior Citizens; nevertheless we hope you will complete the brief questionnaire enclosed and return it to us in the postpaid envelope provided. At the end of the questionnaire you will find space to tell us anything you think we should know, even if it doesn't 'fit' the questionnaire.

The information we gather will be summarized and reported, but no individual persons' responses will be identifiable. All results will be published and available to all through the Council's page on the Town website. Thank you in advance for your assistance.

Sincerely,

SUDBURY COUNCIL ON AGING

David L. Levington

FINAL REPORT ON PROPERTY TRANSITIONS

[SURVEY TO BUYERS]

]Where did you move here from? _____

How long did you live there? _____

Please tell us what attracted you to Sudbury.

	<u>VERY IMPORTANT</u>	<u>SOMEWHAT IMPORTANT</u>	<u>NOT IMPORTANT</u>
Liked the House and Value	_____	_____	_____
Country Character, Beauty	_____	_____	_____
Schools	_____	_____	_____
Church/Synagogue	_____	_____	_____
Library	_____	_____	_____
Parks, Playing Fields	_____	_____	_____
Near Work, good commute	_____	_____	_____
Near friends and Family	_____	_____	_____
People, friendly community	_____	_____	_____
Other _____	_____	_____	_____

Have you thought about where you might live when you retire?

_____ Not at all. _____ Vaguely _____ Definitely

If you have thought about retiring, how likely do you think it is that you will stay in Sudbury? _____ Not likely _____ Possible _____ Very likely

Can you list some of the characteristics that you think of when you think about “a nice place to retire”? Please list as many as you like (use the other side if you’d like.)

	<u>SOMEWHAT IMPORTANT</u>	<u>VERY IMPORTANT</u>
_____	_____	_____
_____	_____	_____

FINAL REPORT ON PROPERTY TRANSITIONS

Please tell us about yourself/selves (optional)

_____ Age ____ Gender _____

_____ Age ____ Gender _____

And your children:

_____ Age

_____ Age

_____ Age

In thinking about the Sudbury and Lincoln-Sudbury Schools, can you guess how many of your children are likely to attend the public schools here, and for how many years?

Is there anything else you'd like to add that might help us understand your thoughts about retirement and how Sudbury might be a better place for retirement?

FINAL REPORT ON PROPERTY TRANSITIONS

There's no need to sign this. However you should know that your comments, besides being tabulated, might be quoted (anonymously of course) if we feel they will help others understand why folks leave Sudbury and why they might stay.

THANK YOU IN ADVANCE!!



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emigration(4).xls"



"questionnaire
immigration.xls"

The above icons can be opened by Excel – but **not** as long as they are part of this email. Save the whole attachment in your “document” file. Then, clicking on the icons will bring up the questionnaires.