

2025



Community Preservation Plan

July 2025

TOWN OF UPTON, MASSACHUSETTS
COMMUNITY PRESERVATION COMMITTEE

IN PARTNERSHIP WITH
CENTRAL MASSACHUSETTS REGIONAL PLANNING COMMISSION (CMRPC)

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Upton Community Preservation Act Overview

The Upton Community Preservation Committee (CPC) is proud to introduce the **2025 Upton Community Preservation Plan**. This plan was developed with the support of the Central Massachusetts Regional Planning Commission (CMRPC), which assisted in drafting and publishing the document. The purpose of this Plan is to outline the administration of the Community Preservation Act (CPA) in Upton and provide guidelines for the allocation and use of CPA funds within the town.

This Plan offers an overview of the Community Preservation Act as it applies specifically to Upton, detailing the procedures for managing CPA funds, identifying funding priorities, and outlining the application process for eligible projects. It serves as a key resource for residents and organizations interested in pursuing CPA funding for projects that benefit the community.

The CPC is an appointed committee responsible for overseeing the town's CPA funds and making recommendations on annual allocations and expenditures, which are then voted on at Town Meeting. This document is intended to guide applicants in navigating the process for requesting CPA funds. It will be reviewed and updated annually to reflect evolving goals and priorities under the CPA.

The Committee extends its gratitude to Upton residents, local officials, municipal staff, and the various boards, committees, and commissions for their invaluable input and collaboration in developing this 2025 Community Preservation Plan.

For more information on the Community Preservation Act and its implementation across Massachusetts, please visit the Community Preservation Coalition website at
<https://www.communitypreservation.org/>

For information on Upton's Community Preservation Act, please visit the town's website at
<https://uptonma.gov/328/Community-Preservation-Committee>

If you have questions or comments regarding Upton's CPA, please reach out to the Committee at
CPC@uptonma.gov.

Community Presentation Act

The **Community Preservation Act (CPA)**, established under Massachusetts General Law (M.G.L. c. 44B), was signed into law on September 14, 2000, by Governor Paul Cellucci and Lieutenant Governor Jane Swift. This legislation serves as a smart growth tool, enabling communities to protect open spaces, preserve historic sites, develop affordable housing, and enhance outdoor recreational facilities. The CPA allows municipalities to create a local Community Preservation Fund, financed by a surcharge of up to 3% on the real estate tax levy. For a community to adopt the CPA, it must receive approval via a ballot referendum.

The Act also created a **statewide Community Preservation Trust Fund**, managed by the Department of Revenue (DOR). This fund provides annual distributions to CPA-adopting communities as an incentive to participate in the program. As of July 2024, 196 municipalities in Massachusetts have adopted the CPA, demonstrating widespread support for community preservation efforts.

Source: Community Preservation Coalition CPA: An Overview <https://www.communitypreservation.org/about>
Accessed July 16, 2024

Upton's Adoption of the CPA

The Town of Upton enacted the CPA on **May 5, 2003**, with an initial approval from the Town Meeting vote, which was later confirmed by a town-wide ballot during the annual election. The adoption received a narrow majority, with 51% of voters in favor. Upton currently applies a **3% surcharge** on real estate taxes, with exemptions that include:

- The first \$100,000 of property valuation
- Qualifying seniors of moderate income
- Low-income homeowners

Source: Community Preservation Coalition CPA: Information on Individual CPA Communities
https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg|a=dr&rid=341 Accessed July 16, 2024

The CPA surcharge applies exclusively to the municipality's real estate taxes, excluding assessments on personal property or taxes levied by special districts, such as water and fire districts. Additionally, funds generated by the CPA surcharge are not restricted by the Proposition 2½ tax levy limits.

Proceeds from the Community Preservation Act, or CPA Funds as it is commonly referred to, are collected and deposited into special municipal accounts identified for Community Housing, Historic Resources, Open Space & Recreation Use, Expenses, and Budget Reserves.

Allocation and Use of CPA Funds

Funds collected under the CPA, commonly referred to as **CPA Funds**, are directed into designated municipal accounts for the following categories:

- Community Housing
- Historic Resources
- Open Space & Recreation
- Expenses and Budget Reserves

These funds can be used to:

- Acquire, create, and preserve Open Space
- Acquire, rehabilitate, and preserve Historic Resources
- Acquire, create, preserve, and support Community Housing
- Acquire, create, rehabilitate, and preserve land for Recreational Use
- Rehabilitate Open Space and Community Housing that were originally acquired or created using CPA funds

The Community Preservation Committee (CPC) oversees the allocation of CPA funds, ensuring they are used effectively to meet Upton's community goals across the specified categories.

Community Preservation Committee: Roles and Responsibilities

Each CPA community must create a local Community Preservation Committee (CPC) upon adopting the Act. These committees are to have five to nine members on the board. Upton established their CPC at the Annual Town Meeting on May 8, 2003, and the November 2024 Special Town Meeting changes to the Upton CPC bylaw. The committee consists of nine (9) voting members as per MGL Chapter 44B. The committee is appointed by Upton's Selectmen and several town boards. The CPC oversees the implementation and administration of the CPA. Each of the following Town boards is required to designate one representative to sit on the CPC:

| CPC Representatives | | | |
|---|-------------------------------|--|-----------------|
| Representative | Selecting Body | Initial Term | Subsequent Term |
| One member of the Upton Conservation Commission | Upton Conservation Commission | - | 3 years |
| One member of the Historical Commission | Historical Commission | - | 3 years |
| One member of the Planning Board | Planning Board | - | 3 years |
| One member of the Recreation Council | Recreation Council | 1 year | 3 years |
| One member of the Housing Authority | Housing Authority | 1 year | 3 years |
| One member of the Open Space Committee | Open Space Committee | 1 year | 3 years |
| One member of the Affordable Housing Trust | Affordable Housing Trust | 3 years | 3 years |
| Two members to be appointed by the Board of Selectmen | Board of Selectmen | One member: 3 years; One member: 2 years | 3 years |
| <i>Should any of the Commissions, Boards, Councils, or Committees that have appointment authority under this Chapter no longer exist for whatever reason, the appointment authority for that Commission, Board, Council, or Committee shall become the responsibility of the Board of Selectmen</i> | | | |
| <i>Source: Upton CPC Bylaw I. Establishment https://www.communitypreservation.org/sites/g/files/vyhlif4646/f/uploads/upton_cpc_bylaw.pdf Reflects November 2024 Special Town Meeting changes to the Upton CPC bylaw.</i> | | | |

The Upton Community Preservation Committee currently consists of the following members:

- ❖ **Mike Penko**, Chair – Term ends 2025
- ❖ **Rick Porter**, Vice-Chair - Term ends 2025
- ❖ **Britanny Besler**, Member - Term ends 2025
- ❖ **Christine Scott**, Member - Term ends 2025
- ❖ **Russ Wood**, Member – Term ends 2025
- ❖ **Katherine Robertson**, Member - Term ends 2025
- ❖ **Brian Gallagher**, Member - Term ends 2027

Michael Antonellis, Upton Town Planner, currently serves as the CPA Administrator.

The Upton Community Preservation Committee usually meets on the first Wednesday of every month at 7:00 PM in Upton Town Hall, room G07, or online. All meeting agendas are filed with the Office of the Town Clerk and posted online a minimum of 48 hours in advance.

Key Responsibilities

1) Develop and Update the Community Preservation Plan

The Community Preservation Plan is a guide for CPC's priorities and decision-making regarding project proposals. It also defines an application process that outlines how the CPC will solicit, review, and recommend proposals. The Community Preservation Plan is a "living document" that will be reviewed and updated annually to reflect changing goals and/or needs in Upton.

To assess and update Upton's community needs, goals, and resources regarding community housing, historic preservation, open space, and recreation, the CPC will solicit feedback from Town commissions, boards, committees, and community organizations. The CPC must hold a hearing to gain input from the public on Community Preservation Plan changes.

2) Review and Recommend CPA Projects

The CPC accepts project proposals throughout the year from eligible applicants and conducts a thorough vetting of each proposal in open public meetings. After completing its due diligence, CPC members vote to recommend or not to recommend a project for approval by Town Meeting. CPC's recommendations for projects that will be sent to Town Meeting shall include specific dollar amounts of CPA funding as well as the specific funding source for the appropriation. Project recommendations are presented to Town Meeting, which then votes to approve, reduce, or reject the CPC's project funding proposals.

3) Keep Records and Prepare an Annual Budget

CPC keeps records of all its meetings, proposals, project recommendations, and decisions. CPC is responsible for submitting a year-end report to Annual Town Meeting as well as a budget request to Town Meeting detailing the annual allocation of CPA revenue for the specific reserve funds — (1) Open Space and Recreation, (2) Community Housing, (3) Historic Preservation, (4)

an Administrative fund, and (5) Budgeted Reserve fund. CPC also submits appropriate documentation (CP-3) to the state Department of Revenue as required by September 14 of each year (see Appendix F).

The community preservation committee shall study the needs, possibilities, and resources of the town regarding community preservation. The committee shall consult with existing municipal boards, including the Conservation Commission, the Historical Commission, the Planning Board, the Recreation Council, the Affordable Housing Trust, and the Housing Authority, or people acting in those capacities or performing like duties, in conducting such studies. As part of its study, the committee shall hold one or more public informational hearings on the needs, possibilities, and resources of the town regarding community preservation possibilities and resources, a notice of which shall be posted publicly and published for each of the two weeks preceding a hearing in a newspaper of general circulation in the town. The Upton CPC also depends on boards and committees to present ad hoc needs to the CPC throughout the year.

Public Involvement & Input

All residents are encouraged and welcome to attend the Committee's meetings; times and locations of these meetings are posted on Upton's town website,
<https://www.uptonma.gov/meetings>

Written comments or questions are also welcome and may be submitted via email to the Community Preservation Committee at CPC@uptonma.gov, c/o Upton Community Preservation Committee, 1 Main Street, Box 6, Upton, MA 01568.

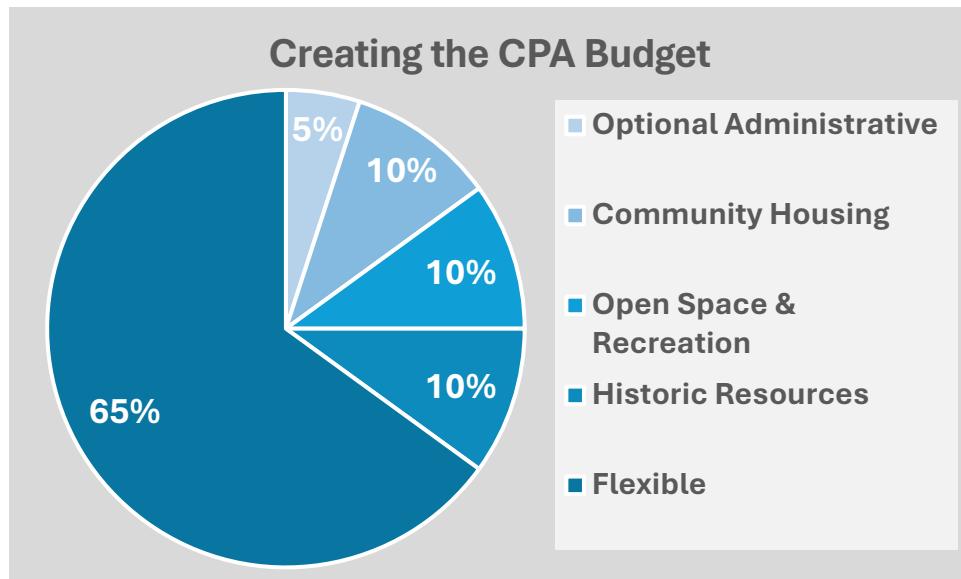
The Upton Community Preservation Committee has a municipal webpage dedicated to CPA, which includes meeting agendas, meeting minutes, and various resource documents.

<https://uptonma.gov/328/Community-Preservation-Committee>

Information about the CPA and Upton CPA revenue and projects is available at the Community Preservation Coalition website. <https://www.communitypreservation.org/>.

CPA Funding Requirements

Each fiscal year, the Town of Upton must allocate or reserve a minimum of 10% of its annual Community Preservation Act (CPA) revenue for each of the three target areas: **COMMUNITY HOUSING, HISTORIC PRESERVATION, and OPEN SPACE** (including **RECREATIONAL USE**). In addition, up to 5% of the annual CPA funds may be used to cover administrative expenses incurred by the Upton Community Preservation Committee (CPC). The remaining balance, up to 65%, may be appropriated for projects in any of these categories or transferred to an undesignated Budget Reserve account for flexibility throughout the fiscal year. Upton has historically transferred the minimum 10% of its annual CPA revenue to the three funds.



Annual Revenue and State Matching Funds

The annual CPA revenues for the Town of Upton come from a combination of a local property tax surcharge and matching funds from the State CPA Trust Fund. Based on June, 2025 data from the Community Preservation Coalition, since the inception of Upton's CPA program in May 2003, the town has collected a **total of \$7,689,502** from local surcharges and **\$4,597,048** from state trust fund distributions, bringing the overall revenue to **\$12,286,550** as of fiscal year 2024. In earlier years, Upton received a **100% match** from the state, significantly boosting the town's ability to fund various projects. For instance, in fiscal year 2005, Upton generated **\$223,744** from its local surcharge and received a significant **\$177,832** match from the state, totaling **\$401,576** in revenue. In recent years, the match percentage has varied due to changes in state allocations. The latest data for fiscal year 2024 shows a state distribution of **\$227,637** and a local surcharge of **\$608,713**, which accounts for a **39.25% match**.

These funds have allowed Upton to invest in significant community projects across housing, historic preservation, open space, and recreation, ensuring that local initiatives receive the financial support needed for sustainable development.

Spending and Appropriation Guidelines

To spend CPA funds, both a recommendation from the CPC and an appropriation by Town Meeting are required:

- **Simple Majority Vote:** Most CPA expenditures, including project funding, are approved by a simple majority vote at Town Meeting.
- **Two-Thirds Majority Vote:** For bonding projects or eminent domain proceedings related to land acquisition under CPA, a two-thirds (2/3) majority vote at Town Meeting is required. (Note: Eminent domain proceedings are rare and have never occurred in Upton. The town hall renovation project is the only CPC funded project in Upton to have been bonded.)

Town Meeting holds the authority to approve, reduce, or reject any spending recommendations put forward by the CPC. Based on CPC recommendations, Town Meeting can choose to set aside CPA revenues into a reserve fund for the designated categories: Community Housing, Historic Preservation, or Open Space/Recreational Use). Each category must receive a minimum of ten percent of available yearly CPA revenue.

Restrictions on Appropriations

- **Town Meeting Limitations:** Town Meeting cannot increase the amount of CPA funds allocated beyond what the CPC recommends. Town Meeting may not appropriate or reserve CPA funds without a prior favorable recommendation from the CPC.
- **Prohibited Uses:** CPA funds cannot be used for maintenance or operational costs of existing properties, or replace existing operating funds; they can only augment them.

Gifts to Community Preservation Fund

The Town of Upton welcomes monetary gifts to its Community Preservation Fund, which can be designated for specific purposes aligned with the four statutory categories: open space, community housing, historic preservation, and recreation.

Donations can be made in various forms including cash and securities. Contributions are fully tax-deductible, permitted by the Internal Revenue Code. For further information, please contact the Committee Chair at CPC@uptonma.gov. The Committee Chair will coordinate the donation process with the Town Manager and Select Board, as necessary.

Allowable Uses of CPA Funds

Under the Community Preservation Act (CPA), funds are dedicated to community preservation purposes that offer public benefits. These funds can be used for specific projects within the four main categories of preservation. The CPA outlines the following approved uses:

Primary Community Preservation Purposes

- ❖ **Open Space:** CPA funds may be used for the acquisition, creation, and preservation of open space. Open space, as defined by the CPA, includes land for protecting water resources (e.g., well fields, aquifers), agricultural and forest lands, wetlands, river and lake frontages, scenic vistas, wildlife preserves, and land for recreational use.
- ❖ **Community Housing:** CPA funds can support the acquisition, creation, preservation, and support of community housing, which includes housing for low- and moderate-income individuals, families, and seniors. Support may involve expenses such as conducting a Housing Needs Assessment, hiring a Housing Coordinator, or creating rental assistance programs for income-eligible residents.\
- ❖ **Historic Resources:** Funds may be used for the acquisition, preservation, rehabilitation, and restoration of historic resources. Historic resources, as defined by the CPA, include buildings, structures, and sites that are listed or eligible for listing on the State Register of Historic Places, or those designated as significant by the local Historic Preservation

Commission (in Upton, the Historic Commission fulfills this role). The town, churches, or non-profit organizations may own historic resources.

- ❖ **Recreational Use:** CPA funds may be directed toward the acquisition, creation, preservation, and rehabilitation of land for recreational purposes. Permissible recreational uses include community gardens, trails, parks, playgrounds, and non-commercial sports fields. Recreational use does not extend to horse or dog racing or to the construction of stadiums or gymnasiums.

Additional Uses of CPA Funds

CPA funds may also support:

- **Rehabilitation and Restoration:** Rehabilitation or restoration of open space and community housing that was acquired or created with CPA funds.
- **Reserve Funding:** Setting aside funds for future preservation efforts.
- **Administrative and Operating Expenses:** Up to 5% of annual CPA revenue can be used for the committee's administrative expenses.
- **Bonding Costs:** Payment of principal and interest, and associated costs for bonds or notes issued for CPA projects.
- **Eminent Domain Damages:** Compensation for property owners when property is acquired through eminent domain for preservation purposes.
- **Grant Matching:** Local matching funds for state and federal grants.
- **Property Acquisition Costs:** Appraisal costs, title searches, and closing fees associated with property acquisition for CPA-approved purposes.

Prohibited Uses of CPA Funds

CPA funds **cannot** be used for:

- **Routine Operational Costs:** CPA funds are supplementary and not intended as a substitute for general operating funds.
- **Routine Maintenance:** Defined as the upkeep of any real or personal property.
- **Restricted Structures:** Gymnasiums, stadiums, or similar facilities are not permitted.
- **Non-Public Projects:** Projects without a clear public purpose or benefit are ineligible for CPA funding.

Definitions for Eligible CPA Projects

The following definitions are provided to help the Community Preservation Committee (CPC) and applicants determine project eligibility:

- **Acquire:** Obtain property interests by gift, purchase, lease, or otherwise (including eminent domain as provided by G.L. c. 44B).
- **Create:** Bring something new into existence.
- **Preserve:** Protect property from harm or destruction.

- **Support:** Provide financial assistance (e.g., grants, loans, rental assistance) to eligible individuals or entities managing affordable housing.
- **Rehabilitate & Restore:** Make capital improvements or extraordinary repairs to restore functionality, including compliance with building codes and historic property standards.

For a visual guide on the use of CPA funds, refer to the chart provided by the Community Preservation Coalition, which outlines allowable fund uses by project type.

| DETERMINING PROJECT ELIGIBILITY | | | | |
|------------------------------------|--|------------|------------|--|
| | Open Space | Historical | Recreation | Housing |
| Acquire | Yes | Yes | Yes | Yes |
| Create | Yes | - | Yes | Yes |
| Preserve | Yes | Yes | Yes | Yes |
| Support | - | - | - | Yes |
| Rehabilitate and/or Restore | <i>Yes - if acquired or created with CPA Funds</i> | Yes | Yes | <i>Yes - if acquired or created with CPA Funds</i> |

The Upton Community Preservation Plan outlines the goals and priorities for projects eligible to receive CPA funding, but eligibility is determined by the specific guidelines established under the Community Preservation Act (CPA). Projects that do not align with the allowable uses under CPA legislation cannot be considered for funding by the Committee.

If you have an idea for a project, it is essential to familiarize yourself with the CPA and its funding requirements. A great starting point is the Community Preservation Coalition's website (<https://www.communitypreservation.org/>), which provides detailed information on the CPA, a database of funded projects, news updates, and technical assistance. The Coalition, a nonprofit organization, supports municipalities like Upton by assisting with CPA adoption and implementation and advocating for the program at the state level.

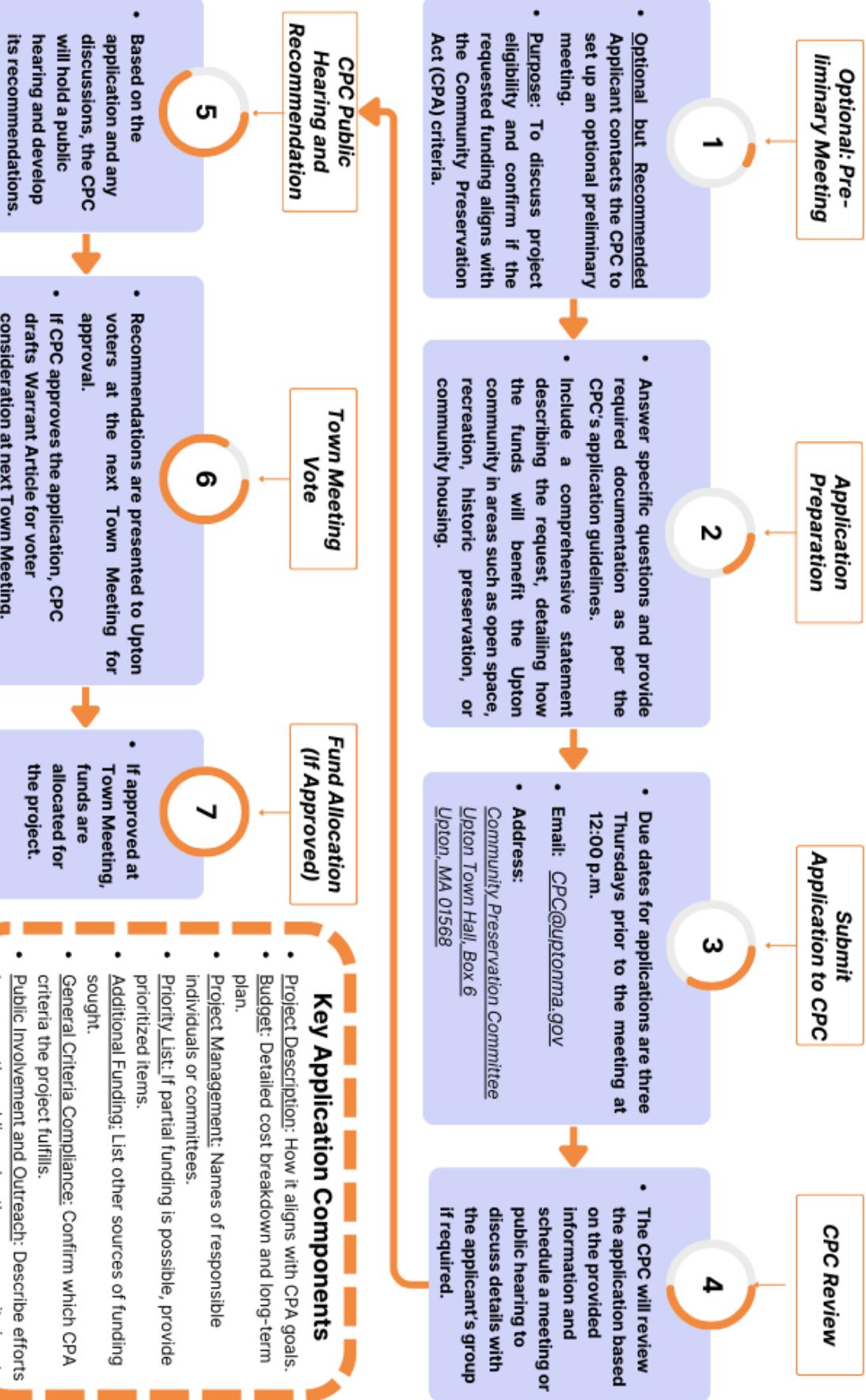
Once a project is determined to meet CPA eligibility requirements, applicants are encouraged to informally present their proposal to the Community Preservation Committee during a public meeting. This step allows for feedback and ensures alignment with community goals prior to submitting a formal application. As required by CPA legislation, the CPC reviews applications, holds an advertised public hearing, and makes funding recommendations for approval at Town Meeting.

Community Preservation Plan

To assist applicants, the CPC, in partnership with the Central Massachusetts Regional Planning Commission (CMRPC), has developed a flowchart that simplifies the application process, outlining each step for securing CPA funds for eligible projects.



Upton's CPC Applying for Community Preservation Funding



Upton CPC Mission Statement

The mission of Upton's Community Preservation Committee (CPC) is to connect, strengthen, and preserve the diverse needs, opportunities, and resources across our community. We are dedicated to enhancing open spaces, recreational areas, historical assets, and community housing to ensure a vibrant, sustainable, and enriching environment for all residents.

Our vision is to create a harmonious and thriving town where the beauty of our natural landscapes, the richness of our history, and the vitality of our community spaces are preserved and celebrated. Through strategic community preservation efforts, we aim to foster a high quality of life for every citizen.

The CPC is committed to a proactive approach, continually seeking opportunities to enhance Upton's quality of life through thoughtful preservation and innovative projects. By leveraging the strengths and insights of our government branches and community members, we aim to build a future where Upton remains a cherished place both economically and culturally.

Upton Community Preservation Act Goals

The Upton Community Preservation Plan serves as a comprehensive guide to assist the Community Preservation Committee (CPC), residents, and applicants in effectively utilizing CPA funds. This plan provides a detailed breakdown of the four main preservation categories eligible for CPA funding, including an analysis of existing conditions and resources, identified needs, established goals, and potential funding opportunities.

By presenting these goals, the plan aims to foster a clearer understanding of how the Upton Community Preservation Committee can support and achieve meaningful preservation initiatives within the community.

The detailed Upton Community Preservation Goals can be found on **Pages 13–33** of this Plan.

COMMUNITY HOUSING

Community Housing Goals

To support the creation and preservation of community housing in Upton, the following goals will be considered in evaluating the use of CPA funding for community housing projects:

- ❖ **Support Housing Creation:** Prioritize CPA funding for projects that increase affordable housing units and address identified gaps in housing diversity and affordability.
- ❖ **Preserve Existing Housing:** Focus on maintaining and improving affordability in existing homes to help residents stay in Upton and preserve the structural integrity of the housing stock.
- ❖ **Encourage Collaboration:** Promote partnerships with nonprofits, developers, and regional housing entities to maximize resources, leverage expertise, and expand the pipeline of CPA-supported housing projects.
- ❖ **Align with Local and Regional Housing Plans:** Ensure CPA-funded projects align with Upton's Housing Production Plan, Affordable Housing Trust Action Plan, and Master Plan, advancing progress toward state-mandated affordability goals.
- ❖ **Develop a Grant Agreement for CPA Funds:** Establish a formal Grant Agreement with the Affordable Housing Trust to guide the use of CPA funds and ensure accountability and compliance.

Upton Town Meeting accepted the provisions of the Municipal Affordable Housing Trust Law and established the Affordable Housing Trust bylaws in 2012. The Trust was created to facilitate the development and preservation of affordable housing in Upton for low- and moderate-income households, in alignment with the Community Preservation Act.

The Board of Trustees governs the Trust and has five members: one member of the Select Board, the Town Manager or a designated representative, and three members appointed by the Select Board. The Board must meet at least four times a year, and trustees serve terms of two years.

The 2025 Affordable Housing Trust Action Plan established the mission for the Housing Trust:

The Upton Affordable Housing Trust is dedicated to enhancing housing affordability and accessibility in our community. Our mission is to support diverse, sustainable housing solutions by focusing on the following principles:

***Support Diverse Housing Development:** We aim to develop a variety of affordable housing options, including rental and ownership units, to meet community needs and work towards the state's ten percent affordable housing goal. We prioritize preserving existing affordable units while fostering growth inclusive of groups such as the elderly, disabled, and young populations. We will focus on advocating for "missing middle" housing development and supporting existing affordable units through monitoring.*

***Advocate for Thoughtful Development:** We advocate for housing that balances*

growth, retains the cultural and historic fabric of Upton, and helps to preserve natural assets and open space. We will strongly consider adaptive reuse and rehabilitation of existing properties when feasible and ensure that new projects align with community values.

Promote Community Understanding: Through education and engagement, we aim to raise awareness of Upton's affordable housing needs and foster dialogue to dispel misconceptions and build community support.

Champion Zoning Changes: We advocate for zoning reforms that support housing diversity and innovation, creating a regulatory environment that accommodates Upton's evolving needs and prepares us for future challenges

The preservation and creation of community housing under the Community Preservation Act (CPA) aims to provide housing opportunities for low- and moderate-income individuals, families, and senior citizens. The CPA statute defines *community housing* as follows:

- **Low-Income Housing:** Housing for individuals and families whose annual income is less than 80% of the area-wide median income, as determined annually by the U.S. Department of Housing and Urban Development (HUD).
- **Moderate-Income Housing:** Housing for individuals and families whose annual income is less than 100% of the area-wide median income, as determined by HUD.
- **Low- or Moderate-Income Senior Housing:** Housing specifically for individuals aged 60 or older who qualify for low- or moderate-income housing.

These definitions ensure that CPA funding targets those most in need, supporting efforts to create and preserve housing that is affordable and accessible to vulnerable populations.

The FY 2024 areawide median family income for the Eastern Worcester County, MA HUD Metro FMR Area (which Upton is part of) is estimated at \$147,400. See the table below for other income limits.

FY 2024 Income Limits Summary

| FY 2024 Income Limit Area | Median Family Income | FY 2024 Income Limit Category | Persons in Family | | | | | | | |
|---|----------------------------|---|-------------------|-----------|-----------|-----------|------------|------------|------------|------------|
| | | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| Eastern Worcester County, MA HUD Metro FMR Area (Upton, MA) | \$ 147,400 | Very Low (50%) Income Limit | \$ 1,600 | \$ 59,000 | \$ 66,350 | \$ 73,700 | \$ 79,600 | \$ 85,500 | \$ 91,400 | \$ 97,300 |
| | | Extremely Low (30%) Income Limit | \$ 30,950 | \$ 35,400 | \$ 39,800 | \$ 44,200 | \$ 47,750 | \$ 51,300 | \$ 54,850 | \$ 58,350 |
| | | Low (80%) Income Limit | \$ 68,500 | \$ 78,250 | \$ 88,050 | \$ 97,800 | \$ 105,650 | \$ 113,450 | \$ 121,300 | \$ 129,100 |

Source: The Department of Housing and Urban Development (HUD) 2024 Data, Effective April 01, 2024, Data for Section 8 Income Limits

<https://www.huduser.gov/portal/datasets/il.html#year2024>

Housing prices in Upton have risen significantly over the years, creating a growing affordability challenge for residents. In 2022, the median sale price for a single-family home was \$670,500, up from \$505,100 in 2021. With such high costs, it is increasingly difficult for individuals or families earning at or below the area median income to afford a home in Upton. Additionally, Upton's housing is owner-occupied, with limited rental options available, further restricting opportunities for those unable to purchase a home.

The use of CPA funds for housing projects in Upton has been minimal. There have been four CPC projects related to community housing. These projects have supported Housing Production Plans, the acquisition of a foreclosed property for affordable housing development and have provided funds to the Affordable Housing Trust for the creation of affordable housing units and to fund the development of the Affordable Housing Trust Action Plan.

Stakeholders on the Affordable Housing Trust indicated that in past years they rarely applied for funding through the CPC. This hesitation stems from a lack of clarity about what projects qualify for CPA funding and an assumption that initiatives may not meet the eligibility criteria. Consequently, many potential housing projects are not explored through this funding avenue.

For a full list of funded projects see Appendix A.

Prior Plans

Upton Master Plan, 2005

Upton adopted its Master Plan in 2005 after conducting extensive public outreach, research, and analysis. Chapter 4 of the plan focuses on housing development and affordability, addressing the current housing inventory as well as future needs. The plan offers recommendations for achieving the goals and objectives outlined in each chapter. The housing strategies align with the Vision Statement, reflecting the community's aspirations for Upton's future.

The full Master Plan is available at the following link:

<https://cmrpc.org/wp-content/uploads/2024/01/Upton-2005-Master-Plan.pdf>

Goal: Preserve Upton's rural, small-town character and open space; ensure that housing development is slow, deliberate, and planned; and provide a diversity of housing affordability while maintaining a single-family character.

Objectives:

- Maintain the 80,000 square-foot lot size requirement that currently exists in Upton's Agricultural-Residential zone and do not reduce the size of this zone.
- Coordinate housing development with municipal services.
- Provide housing options that will allow residents to remain in town as they age and allow children of residents to establish families in Upton.
- Encourage developers to incorporate open space designs into new housing projects.
- Strengthen the review process for new development and enforcement of town bylaws and regulations.
- Recommend enacting bylaws to ensure that future housing development maintains the town's compliance with the 10% affordable housing requirement.

Housing Production Plan, 2012

The 2012 Housing Production Plan was prepared by the four member Upton Local Community Housing Partnership Committee with the assistance of the Central Massachusetts Regional Planning Commission. The Housing Production Plan was developed to provide guidance for the development of affordable housing a strategy stated in the 2005 Master Plan.

The full Housing Production Plan is available at the following link:

www.uptonma.gov/DocumentCenter/View/288/Upton-Housing-Production-Plan--2012-PDF

The Plan is organized into three main sections:

1. **Housing Needs Assessment**
2. **Housing Action Plan**
3. **Housing Strategies**

The Action Plan established a primary goal: *Preserve Upton's rural, small-town character and open space; ensure that housing development is slow, deliberate, and planned; and provide a diversity of housing affordability while maintaining a largely single-family character.*

To support this goal, the plan established six objectives:

1. Maintain the 80,000 square-foot lot size requirement that currently exists in Upton's Agricultural-Residential zone and do not reduce the size of this zone.
2. Coordinate housing development with municipal services.
3. Provide housing options that will allow residents to remain in town as their age and allow children of residents to establish families in Upton

4. Encourage developers to incorporate open space designs into new housing projects.
5. Strengthen the review process for new development and enforcement of town bylaws and regulations.
6. Recommend enacting bylaws to ensure that future housing development maintains the town's compliance with the 10% affordable housing requirement.

The Action Plan outlined four strategies and corresponding action items, assigning priority and responsible parties to each action item.

1. Build Local Capacity to Promote Affordable Housing

- a. Conduct Ongoing Community Outreach
- b. Secure Professional Support
- c. Establish and Capitalize the Upton Affordable Housing Trust
- d. Develop and Adopt a Comprehensive Permit Policy
- e. Regional Collaboration
- f. Negotiate Developer Fees for Peer Review on Comprehensive Permit Projects
- g. Coordinate the Town's Affordable Housing Efforts

2. Make Zoning and Planning Reforms

- a. Promote Greater Diversity and Density of Permitted Housing Types
- b. Promote Mixed-Use Development
- c. Develop an Inclusionary Zoning Bylaw
- d. Modify the Open Space Residential Design Bylaw
- e. Create and Inventory of Properties Potentially Suitable for Affordable Housing

3. Partner with Developers to Produce New Affordable Housing Units

- a. Provide Suitable Public Property for Development
- b. Offer Predevelopment Funding
- c. Support Permitting Through Advocacy
- d. Provide Gap Financing to Leverage Project Financing

4. Preserve Existing Housing

- a. Monitor and Maintain the SHI Inventory
- b. Explore Local Initiative Projects to Buy Affordable Housing Deed Restrictions
- c. Help Qualifying Residents Access Housing Assistance

Housing Production Plan, 2023

In 2022, the Upton Town Meeting approved the use of Community Preservation Act (CPA) funds to develop an updated Housing Production Plan (HPP). This effort was a collaboration between the Upton Housing Production Plan Committee—a group of seven volunteers appointed by the Board of Selectmen—and the Central Massachusetts Regional Planning Commission (CMRPC).

The HPP serves as a strategic guide for Upton to address local housing needs and comply with Massachusetts Chapter 40B, which requires that at least 10% of year-round housing be affordable to households earning at or below 80% of the Area Median Income (AMI).

The Plan is organized into three main sections:

1. **Housing Needs Assessment** – Analyzing the current housing landscape.
2. **Housing Challenges** – Identifying obstacles to affordable housing.
3. **Housing Production Goals and Strategies** – Outlining actions to meet housing needs.

This comprehensive document incorporates demographic research, a review of zoning regulations, and an implementation plan to help Upton achieve its housing objectives while addressing the needs of current and future residents.

Goal 1: Build Local Capacity to Promote Affordable Housing

- Conduct ongoing community outreach
- Secure professional support
- Continue to capitalize the Upton Affordable Housing Trust
- Participate in regional collaboration
- Encourage Upton staff, board and committee members, and volunteers to participate in educational trainings and programs related to affordable housing
- Continue to coordinate the Town's affordable housing efforts under the guidance of the Town Planner
- Identify and leverage resources to advance housing production and programs

Goal 2: Make Zoning and Planning Reforms

- Promote greater diversity and density of permitted housing types
- Continue to promote mixed-use development
- Develop an inclusionary or incentive zoning bylaw
- Update the inventory of properties potentially suitable for affordable housing development as needed and promote the inventory to affordable housing developers
- Comply with the requirements of M.G.L. Ch. 40A Section 3A
- Prepare design guidelines or standards to accompany new multi-family housing developments
- Explore regulations for short-term rental housing

Goal 3: Partner with Developers to Produce New Affordable Housing

- Provide suitable public property for development
- Offer predevelopment funding
- Support permitting with advocacy
- Provide support and gap financing to leverage project financing
- Advocate for a higher inclusion of accessible units in proposed housing developments
- Continue to use Community Preservation Act funds to further affordable housing goals
- Explore small-scale infill development options on nonconforming lots within designated areas

Goal 4: Preserve Existing Housing for All Upton Residents

- Monitor and maintain the Subsidized Housing Inventory (SHI)
- Explore opportunities for enhancing the affordability of existing homes for all Upton residents
- Help qualifying residents access housing assistance

The full Housing Production Plan is available at the following link:

<https://www.uptonma.gov/DocumentCenter/View/5297/Upton-Housing-Production-Plan-Draft-August-2-version>

Affordable Housing Trust Action Plan, 2024

In 2024, the Upton Affordable Housing Trust (AHT), in collaboration with the Central Massachusetts Regional Planning Commission (CMRPC), developed an Affordable Housing Trust Action Plan to guide its mission and priorities for the next five years. The plan focuses on supporting a range of housing options to meet the needs of diverse demographics, including seniors, individuals with disabilities, and young families while maintaining Upton's cultural heritage. The plan provides actionable steps, identifies funding sources, and establishes performance metrics to ensure accountability and measure progress. This comprehensive roadmap is designed to create a balanced approach to addressing Upton's housing needs while adapting strategies as necessary for a sustainable future.

Goal 1: Increase Affordable Housing Units

- Raise \$25,000 annually in grants and donations to support land acquisition and construction efforts.
- Ensure that ten percent of CPA funding is dedicated to Affordable Housing Trust operations.
- Establish a \$300,000 reserve fund for future developments over the next five years based on CPA income and potential private donations.
- Establish a procedure for acquiring additional funding for Affordable Housing Trust from State and federal grants where applicable, as well as private donations.

Goal 2: Preserve Existing Housing

- Secure \$25,000 in funding for programming to support tenants and homeowners

Goal 3: Foster Community Engagement

- Continue to renew the Regional Housing Coordinator contract annually through CMRPC.
- Develop a continuing education fund for community members.

Goal 4: Advocate for Policy Reforms

- Obtain \$15,000 annually through state grants through CMRPC and other regional partners to fund policy research and development.

Goal 5: Strengthen Partnerships and Funding

- Achieve higher funding in new funding partnerships and grant awards to enhance operational capabilities.
- Expand the funding portfolio to ensure sustainable growth and project implementation.

Needs

Discussions with key stakeholders, including members of the Upton Affordable Housing Trust, along with insights from prior plans, have identified critical community housing needs. The challenges in Upton are tied to **rising housing costs, limited rental options, and a scarcity of affordable units**. These findings highlight the importance of implementing targeted strategies to improve **housing affordability and accessibility** for residents.

CPA Eligibility

CPA funds can be used to acquire, create, preserve, and support community housing. Additionally, housing projects originally funded through the CPA may qualify for rehabilitation or restoration using CPA resources. Priority should be given to projects that repurpose existing structures or involve new construction on previously developed sites.

Community Preservation funds may also be directed toward initiatives such as low-interest loan programs for first-time homebuyers who meet income eligibility requirements, financial aid for eligible homeowners, gap financing, and matching grants from state or federal programs for low-income housing. For projects involving housing not owned by the municipality, an Affordability Deed Restriction is required to ensure long-term affordability.

Funding

Each year, the town is required to spend, or set aside for future spending, ten percent (10%) of total annual CPA revenues for community housing projects. Appendix A itemizes the community housing projects which have used CPA funding to date.

HISTORIC RESOURCES

Under the CPA statute, historic resources include various assets such as buildings, structures, vessels, real property, documents, and artifacts. To qualify for CPA funding, these resources must either be listed on the Massachusetts State Register of Historic Places or deemed significant to the town's history, archaeology, architecture, or culture by the local historical commission.

Historic Resources Goals

To support preservation of historic resources in Upton, the following goals will be considered in evaluating the use of CPA funding for historic preservation projects:

- ❖ **Support the Preservation of Historical Resources:** Prioritize CPA funding for projects that protect and restore historic structures, documents, and sites significant to Upton's history, archaeology, architecture, or culture.
- ❖ **Increase Recognition of Historical Significance:** Enhance advocacy and pursue comprehensive state and federal recognition for Upton's historical assets to ensure they are fully integrated into regional and local preservation strategies.
- ❖ **Strengthen Partnerships:** Promote collaboration between the Historical Commission and the CPA Committee to align funding opportunities with preservation goals, identify project gaps, and address challenges with strategic planning.
- ❖ **Expand Funding Opportunities:** Explore additional funding mechanisms such as grants, public-private partnerships, and external resources to supplement CPA funds and fully support large-scale historical preservation projects.
- ❖ **Align with Preservation Standards:** Ensure CPA-funded projects meet Massachusetts Preservation Standards (MPS) and other eligibility criteria to maintain compliance and uphold the town's historical heritage.

Historical Work and Achievements in Upton

Since adopting the CPA, Upton has actively used CPA funds to preserve its historical character, funding 24 historical resource projects with a total investment of \$3,066,694 (as of the creation of this plan).

| CPA Historical Projects in Upton | |
|--|-----------------------------|
| CPA Historical Funds (total) | Historical Projects (total) |
| \$3,066,694 | 24 |
| <i>Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg%3Fa%3Dq&qid=39</i> | |

Notable Historical Preservation projects efforts have been completed with CPA funding, such as:

- Town Hall Restoration (design and construction)
- Heritage Park Acquisition (Upton Chamber)
- Upton Grange Restoration
- Town Records Preservation
- Town Clock Restoration
- Maplewood Cemetery Stone Wall Restoration

For a full list of funded projects see Appendix B.

Upton's Historical Assets

The Massachusetts State Register of Historic Places catalogues buildings, structures, objects, and sites in Upton that hold local, state, or national significance. This inventory is updated annually by the Massachusetts Historical Commission (MHC) and can be accessed online via MassGIS at [MassGIS Data: MHC Historic Inventory](#). A detailed Upton Historical Inventory (as of November 2024) is provided in Appendix I.

The **Upton Historical Commission** plays a pivotal role in preserving these resources. The commission, comprised of seven dedicated members, works to protect and promote the town's historic heritage. Their mission statement reflects their commitment to education, preservation, and fostering pride in Upton's past.

"The mission of the Upton Historical Commission is to protect and preserve the community's historical assets for the education, enjoyment, and benefit of current and future generations. The Commission will promote inventory, preservation, accessibility, and research of our indispensable historical resources. By honoring and preserving our community's history we enhance the quality of our lives, help establish a sense of pride and can provide economic stability for the community."

Notable Historic Sites

1. **Upton Town Hall** (1881) Milford Street
2. **Boot Shop** (1790) Mendon and Chestnut Streets
3. **Site of John Sadler House** (1715) Grove Street
4. **Knowlton Hat Factory** (1834) Main Street, West Upton
5. **First Burying Ground** (1730) * Mendon and Grove Streets
6. **Stone Chamber – Heritage Park** (unknown date) Elm Street
7. **High School - Upton Grange (1851)** School Street
8. Civilian Conservation Corps (1935) Westborough Road

*Note the First Burying Ground is also the site of Upton's first meeting house

Community Projects

The Upton Historical Commission also collaborates with local organizations and individuals, including Eagle Scouts, to complete preservation projects. A comprehensive *Eagle Project Checklist* is available to streamline these efforts, ensuring communication and project success. To review the Checklist please use the following link:

<https://www.uptonma.gov/DocumentCenter/View/642/Eagle-Project-Checklist-PDF>

One standout effort was the *Save the Cave Project* (2012). This initiative preserved the Upton Chamber by removing debris, repairing the entrance, and revitalizing the surrounding area, securing the site as a public park. To read about the project use the following link:

<https://www.uptonma.gov/DocumentCenter/View/635/Update-Save-the-Cave-Project-PDF>

Integration of Historic Preservation into Broader Plans

Upton's 2005 Master Plan emphasized the importance of preserving the town's rural character and historic assets. For example, survey respondents strongly supported creating a historic district, which garnered 132 votes, the highest among preservation initiatives. The plan also recognized the potential for economic growth through participation in the *John H. Chafee Blackstone River Valley National Heritage Corridor*. The Corridor offers funding and opportunities for preserving historic buildings and creating history-based tourism attractions.

Archeological and Cultural Significance

The *Upton Chamber*, part of the Pratt Hill Historic District, was determined eligible to be entered into the National Register of Historic Places in 2011. This designation acknowledges its importance in the cultural traditions of the Narragansett Tribe, Wampanoag Tribe of Gay Head (Aquinnah), and Mashpee Wampanoag Tribe. The *2012 Upton Chamber Report* further recommended its inclusion on the National Register for its archaeological significance. To read the report, access the following link:

<https://www.uptonma.gov/DocumentCenter/View/640/Upton-Chamber-Report---2012-PDF>

Upton Open Space and Recreation Plan, 2020

Within the plan, specific opportunities for Historic and Landscape were highlighted as areas most in need of protection best to serve the present and future inhabitants of Upton. Refer to the list below:

- Protect ceremonial stone landscapes
- Protect scenic roads, stone walls and special trees
- Preserve CCC buildings in Upton State Forest.
- Develop Upton Center according to the vision adopted at May 2019 Town Meeting
<https://www.uptonma.gov/DocumentCenter/View/691/Upton-Center-Visioning-Final-Report-PDF>

To review the 2020 OSRP plan please use the following link <https://uptonma.gov/460/Open-Space-Recreation-Plan-2020>

Needs

The Historical section of Upton's Community Preservation Plan (CPP) highlights the need for enhanced support and strategic planning to address challenges faced by the Historical Commission and ensure the preservation of the town's cultural and architectural heritage. Feedback from the Upton CPP Focus Group meeting underscored several critical areas for growth and improvement:

1. Increased Recognition and Advocacy

Daniel Lazarz emphasized the importance of achieving greater state recognition for Upton's historical assets. While some sites have received partial recognition, they do not enjoy the full benefits afforded under the Massachusetts Preservation Standards (MPS). Strengthening advocacy efforts and pursuing a more comprehensive state-level acknowledgment can elevate the profile of Upton's historical resources, ensuring they are fully integrated into local and regional preservation strategies.

2. Strengthening CPA-Historical Commission Collaboration

Participants stressed the need for a closer partnership between the Historical Commission and the Community Preservation Act (CPA) Committee. By fostering regular communication and collaboration, the Historical Commission can better align its goals with CPA funding opportunities. This partnership could also help identify gaps in current projects and strategize ways to address these challenges, leveraging CPA assistance as a catalyst for growth.

3. Addressing Funding Gaps

One significant challenge identified is the ability to fully fund large-scale historical preservation projects. While CPA funds have been instrumental in supporting many initiatives, they are often insufficient to cover entire project costs. To bridge this gap, Upton should explore alternative funding mechanisms, including grants, public-private partnerships, and other external resources. Education campaigns may also be necessary to address public concerns and misconceptions about private partnerships and their role in preserving the town's historical character.

4. Integration with Broader Community Development Goals

Historical preservation in Upton does not exist in isolation but is deeply interconnected with other aspects of the town's growth and development. The downtown area, particularly Main Street, serves as a focal point where historical preservation intersects with economic development, urban planning, and community identity. Recognizing these connections, the Historical Commission should work closely with other municipal departments and stakeholders to ensure that preservation efforts complement broader goals, such as revitalizing the downtown area and enhancing tourism opportunities.

CPA Eligibility

To ensure eligibility for CPA funding, historic resources must meet **at least one** of the following criteria:

1. Be listed on the **Massachusetts State Register of Historic Places**,
2. Be determined by the **local historical commission** to hold local historical, cultural, or architectural significance.

If a resource does not meet either of these requirements, **it is not eligible for CPA funding**. This framework ensures that CPA funds are used to protect and preserve resources that hold meaningful value to Upton's heritage.

Applicants are encouraged to review available resources prior to submission of an application under historic resources. See also the “Qualifying Historic Projects for CPA Funding” flowchart prepared by the Community Preservation Coalition included in Appendix J.

Funding

Each year, the town is required to spend or set aside for future spending ten percent (10%) of total annual CPA revenues for historic preservation projects. Appendix B itemizes the historic preservation projects which have utilized CPA funding to date.

Prior to making a final recommendation on historic projects, the Community Preservation Committee should review the project's plan in detail to ensure that it complies with the Secretary's Standards. The Coalition also recommends that the Committee specify a board, town staff member, or outside consultant to oversee the project and ensure these standards are followed. Your local Historical Commission may be able to assist in the CPC's review of a project's scope of work to determine compliance with the Secretary's Standards. In addition, the Massachusetts Historical Commission can provide more information about applying the Secretary's Standards.

OPEN SPACE

Under the CPA statute, *open space* is defined as land used to protect natural resources such as well fields, aquifers, wetlands, and scenic vistas, as well as land for recreation, wildlife preservation, and watershed protection.

The Town of Upton boasts a diverse and significant landscape shaped by natural and human influences. Covering 21.81 square miles (13,853 acres), most of the town lies within the Blackstone River watershed, with a small portion in the Sudbury River watershed.

Approximately 5,230 acres of the Miscoe, Warren, and Whitehall Watersheds Area of Critical Environmental Concern (ACEC) fall within Upton, contributing to the town's rich ecological value. <https://www.mass.gov/info-details/miscoe-warren-and-whitehall-watersheds-acec>

Open Space Goals

To support the current inventory of open space in Upton, while maximizing the values that additional open space would provide for town residents, the following goals will be considered in evaluating the use of CPA funding for open space projects:

- ❖ **Protect and Preserve Critical Natural Resource Areas:** Prioritize CPA funding to safeguard water resources, including aquifers, well fields, watersheds, and wetlands. Focus on protecting environmentally sensitive areas through acquisitions and conservation restrictions, with an emphasis on critical zones such as the Warren Brook Watershed ACEC and expansions of the Peppercorn and Warren Brook Watershed Conservation Areas.
- ❖ **Preserve Scenic Corridors, Agricultural Land, and Upton's Rural Character:** Use CPA funds to acquire or protect scenic viewsheds and corridors, such as those along Mendon Street, West River Road, and Ridge Road. Support parcels of agricultural land and ensure their sustainability while preserving the town's rural and small-town character.
- ❖ **Protect Open Space, Wildlife Habitat, and Water Resources:** Direct efforts to protect open spaces that provide wildlife habitat, water resource protection, and essential ecosystem services. Invest in strategies to preserve these assets for long-term ecological and community benefits.

Additional goals and needs to enhance open space values in Upton are listed in the 2020 Open Space and Recreation Plan and summarized in the Appendix.

<https://www.uptonma.gov/460/Open-Space-Recreation-Plan-2020>

Current Conditions and Connections to CPP

Upton's open space provides critical environmental, recreational, and aesthetic benefits, aligning with CPP goals by enhancing natural resource preservation and fostering sustainable land management. Approximately 29% of Upton's land is permanently protected, including Upton State Forest, conservation areas, and land trust properties. Upton is also well-positioned within a regional network of protected lands, such as Upton State Forest, Whitehall State Park

(Hopkinton), the Blackstone River and Canal Heritage State Park (Northbridge), and Pell Farm Conservation Area (Grafton) offering opportunities for greenways and trail connectivity.

Key Partnerships

Upton benefits from collaborations with regional and local organizations, including the Metacomet Land Trust, Sudbury Valley Trustees, and The Friends of Upton State Forest. These partnerships bolster efforts to preserve open space and ensure sustainable stewardship of the town's natural resources.

Governance and Committees

Several local committees work to manage, protect, and enhance Upton's open space:

Conservation Commission

The Conservation Commission enforces the Massachusetts Wetlands Protection Act, Town of Upton Wetland and Stormwater Bylaws, manages over 1000 acres of conservation land and other open space, and leads educational and volunteer initiatives.

- **Mission Statement:** *Protect and manage Upton's natural resources through acquisition, education, and regulatory efforts.*
- **Key Focus:** Wetland protection, open space preservation, and community engagement.

Open Space Committee (OSC)

The OSC, a subcommittee of the Conservation Commission, works to identify and protect critical open space and natural resources while balancing development pressures.

- **Mission Statement:** *Preserve Upton's quality of life by safeguarding open spaces, natural resources, and the town's character.*
- **Key Goals:** Educate residents, develop bylaws and strategies to protect open space, and promote land stewardship.

CPC Funded Open Space Acquisition Projects

CPA funds have been leveraged to fund or partially fund 5 open space acquisitions. These include:

| Upton CPA Funded Open Space Conservation | | | |
|--|------|------------------|-------|
| Property | Year | CPA Funding (\$) | Acres |
| Heritage Park | 2004 | 400,000 | 7.5 |
| Sweetwilliam Farm | 2011 | 614,500 | 95.7 |
| Robertson Family CR | 2019 | 176,286 | 50 |
| Kelly Property (Peppercorn Hill) | 2020 | 207,000 | 42.4 |
| Mechanic St. Property | 2022 | 743,000 | 95.7 |

CPA also funded the 2007 Dodson Open Space study.

<https://www.uptonma.gov/DocumentCenter/View/884/Dodson-Open-Space-Study-PDF?bidId=>

Other CPA funded open space related projects and listed below as Land Stewardship Committee and Lakes, Ponds, and Streams Committee projects.

For a full list of funded projects see Appendix C.

Land Stewardship Committee (LSC)

This Conservation Commission subcommittee focuses on the management of specific conservation parcels, trail maintenance, and community garden leadership.

Responsibilities:

- Prepare management plans for conservation areas and other land managed by the Conservation Commission. Draft management plans require public review and approval by the Conservation Commission.
- Implement management plans. Activities include but are not limited to: trail construction and maintenance; habitat protection and enhancement; erosion control, invasive species control; installation of signs, trails, and boundary markers; natural history studies; forest management (including fuelwood cuts); clean-ups; and periodic inspections.

- Prepare trail maps, guidebooks, and material for the Town of Upton website to foster public use and enjoyment of managed lands.
- Educate the public regarding the Town of Upton Land Use Regulations.

CPA Funded LSC Projects

- Community Garden Water Supply
- Robertson Family CR Trail Bridge
- Warren Brook Conservation Area Boardwalk Construction and Restoration
- Stefans Farm Access Studies

Lakes, Ponds, and Streams Committee (LPSC)

This independent committee develops and implements policies to preserve the health of Upton's water bodies through water quality monitoring, invasive species management, and public education.

- **Mission Statement:** *Ensure sustainable use and ecological health of Upton's lakes and ponds.*

Responsibilities:

- Develop plans for surveys of the lakes/ponds, including general water quality parameters (clarity, nutrient/coliform levels, bacteria levels, cyanobacteria dissolved oxygen, etc.) and occurrences of invasive non-native plant and animal species.
- Assist town in hiring professional consultants, as needed, to conduct water quality and watershed studies, and provide lake, pond & stream management recommendations.
- Devise strategies for and prioritize various lake/pond management needs based on the survey results and management recommendations.
- Implement lake, pond & stream management recommendations.
- Apply for grants and/or obtain funding to conduct studies and implement lake, pond & stream management measures identified through the steps listed above.
- With DPW and other boards, identify and apply for grants which could fund retrofits to existing stormwater outfalls that discharge to sensitive lakes and ponds.
- Maintain an informational Lakes, Pond and Streams Committee page on the town website; Develop and distribute educational materials, press releases and social media posts on best management practices to control non-point source pollutant loading to lakefront landowners, farm/livestock facilities, etc.
- Assemble and educate a group of committed volunteers that could conduct some water quality studies, when necessary, periodically hand-eradicate infestations of invasive/non-native aquatic plants.

Looking ahead to their 2025-2030 activities, the committee plans to:

- Prepare a Management Plan for Pratt and Mill Ponds.
- Conduct water quality studies at Pratt and Mill Ponds and Lake Wildwood.
- Erect a kiosk for boaters and anglers at Pratt Pond.
- Study options to improve the Lake Wildwood boat ramp.
- Continue seeking CPA support for these initiatives.

CPA Funded LPSC Projects

- Pratt and Mill Pond Water Quality Studies
- Other Funding for Water Quality Studies
- Pratt and Mill Management Plan

Open Space and Recreation Plan (OSRP) 2020

Upton's OSRP, updated in 2020, outlines key goals to address the community's open space and recreation needs. These goals align with the CPP's emphasis on sustainable land management and recreational enhancement.

OSRP Goals

1. Preserve Upton's rural and small-town character.
2. Protect open space and water resources.
3. Expand recreational facilities and trail systems.
4. Promote stewardship of town-owned conservation lands.
5. Foster environmental education and awareness.

Needs

The 2020 Open Space and Recreation Plan (OSRP) identified a range of needs and opportunities for open space and recreation in Upton. These findings were further enriched by a survey of town residents and interviews with key stakeholders, providing additional insights into community priorities. The OSRP also provided a comprehensive inventory of open space properties and resources.

Open Space and Watershed Protection:

The OSRP emphasizes the importance of protecting and expanding Upton's natural resources and conservation areas. Key needs include:

- Designate Stefans Farm as a Conservation Area: Officially protect this land and its adjacent properties to preserve critical open space.

- *Link Protected Lands in Southeast Upton:* Create continuous corridors of protected lands to enhance habitat and recreational opportunities.
- *Expand Key Conservation Areas:*
 - Expand the Warren Brook Watershed Conservation Area northward.
 - Expand the Peppercorn Conservation Area by acquiring or permanently protecting inholdings and adjacent parcels.
- *Protect Critical Areas:*
 - Safeguard the Warren Brook Watershed Area of Critical Environmental Concern (ACEC).

Neighborhood:

Improving connectivity and preserving scenic areas are vital for community well-being and environmental protection. Needs include:

- *Trails and Sidewalks:*
 - Connect the town center to Heritage Park and Pratt Pond through land acquisition for trails and sidewalks.
- *Protect Scenic Corridors:*
 - Mendon Street/Grove Street corridor.
 - West River Road.
 - Ridge Road and the area surrounding Upton State Forest.
 - Warren Brook corridor along Mechanic Street, including the development of a river walk trail.

Townwide:

A cohesive strategy for open space management across the town is crucial to preserving Upton's character. Key initiatives include:

- *Trail Systems:*
 - Develop a town-wide loop trail that links to trail systems in neighboring towns.
- *Land Conservation:*
 - Pursue the conservation of "owner unknown" properties and unprotected town-owned parcels.
 - Encourage owners of Chapter 61 land and other large parcels to protect their lands with Conservation Restrictions.

- *Stewardship and Education:*
 - Foster good stewardship of town-owned lands.
 - Control invasive species.
 - Promote environmental education.
 - Encourage the use of open space and recreational resources by teenagers and seniors.

CPA Eligibility

Under the CPA Statute, open space includes land that is necessary for the protection or use of groundwater and surface water resource areas, agriculture, passive and active recreation, and scenic views. CPA funds may be used to acquire, create or preserve land for these purposes through means such as outright purchase or purchase of a permanent conservation or agricultural preservation restriction or easement. CPA funds may also be used for the rehabilitation or restoration of open space land that was acquired or created with use of CPA funds.

Funding

Each year, the town is required to spend, or set aside for future spending, ten percent (10%) of total annual CPA revenues for open space (& recreational use) projects. Appendix C itemizes the open space projects that have used CPA funding to date.

RECREATION USE

Under the CPA statute, *recreational use* is defined as active or passive use, including 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. “Recreational use” shall not include horse or dog racing or the use of a stadium, gymnasium, or similar structure.

Recreational Use Goals

To support the current inventory of open space in Upton, while maximizing the values that additional open space would provide for town residents, the following goals will be considered in evaluating the use of CPA funding for open space projects:

- ❖ **Implement Recreation Plans and Address Key Needs:** Prioritize funding for projects that align with the 2019 Four Parks Master Plan and address identified needs such as building an off-leash dog area, improving water quality at Pratt Pond, and managing invasive weeds in town ponds.
- ❖ **Enhance Accessibility and Inclusivity:** Support projects that increase accessibility to recreational facilities and trails, including collaboration with the Department of Conservation and Recreation (DCR) to develop accessible trails at Upton State Forest.
- ❖ **Invest in Recreational Infrastructure Upgrades:** Allocate funding for improvements to existing recreational infrastructure, such as upgrading the boat launch at Lake Wildwood and enhancing facilities at Pratt Pond-Kiwanis Beach.

Additional goals to maximize recreation values in Upton are listed in the 2020 Open Space and Recreation Plan and the Town of Upton Four Parks Master Plan:

<https://www.uptonma.gov/460/Open-Space-Recreation-Plan-2020>

<https://uptonma.gov/DocumentCenter/View/970/Town-of-Upton-Four-Parks-Master-Plan-PDF>

The Town of Upton offers its residents a range of active and passive recreational opportunities, with **83.18 acres** of recreational land. These facilities are managed by various town departments and commissions to meet the needs of the community. Below is an overview of existing recreational facilities, projects funded through the CPA, and future goals for enhancing recreation in Upton.

| Upton Recreation Summary Table | | | |
|---------------------------------------|-------|-----|---|
| Recreation Land | Acres | LOP | Notes |
| Kiwanis Beach | 38 | L | Managed by the Recreation Commission |
| VFW | 14.28 | L | Recreational fields, parking, facility |
| Heritage Park (Elm Street) | 7.5 | P | Managed by Historical Commission; CR held by Metacomet Land Trust |
| Henderson and Rivers Memorial Field | 7 | L | Managed by Recreation Commission flowage easement land |
| Leland Field (behind Memorial School) | 10 | L | Managed by the Recreation Commission |
| Lake Wildwood Park | 4.3 | P | Acquired as a Conservation Area in 1964. |
| Upton Playground | 2.1 | L | Adjacent to VFW, includes a parking area |

Source: Upton OSRP 2020

Key Recreational Facilities in Upton

1. Wildwood Park (Lake Wildwood)

This park provides access to Lake Wildwood and is a popular spot for fishing and ice fishing. Open from April to October, the park has an unpaved loop for parking, a small unpaved boat launch, and picnic tables. The Upton Department of Public Works (DPW) manages this site. It was acquired by the Conservation Commission using Self Help Funding from the Commonwealth in 1964.

2. Pratt Pond – Kiwanis Beach

A popular multi-use recreational area with two entrances offering parking for 100 vehicles. Amenities include:

- Beach area and pavilion
- Softball and soccer fields
- Basketball, volleyball, and tennis courts
- Picnic tables, grills, and a beach house with restrooms

The Recreation Commission sponsors summer programs, including a concert series, swim lessons, and the "Kids at Play" program. The Upton DPW manages this site.

3. Upton Veterans Memorial Playground

Located in the town center, this playground offers:

- Slides, swings, sandboxes, climbing apparatus, and benches;
- Adjacent municipal parking lot with 70 spaces

Managed by the Upton DPW, it is open from dawn to dusk.

4. Richard Henderson and Ernst Rivers Memorial Field

This site includes a soccer field, gravel parking for 40 vehicles, and frontage on the West River. CPA funds supported the installation of an irrigation system. The DPW manages this property.

5. Leland Field

- Reconfigure athletic facilities to allow for a full-sized field
- Implement basic accessibility upgrades to comply with ADA and AAB Guidelines.

6. Trask Property

- Use this property to address facilities shortages for various athletic activities while allowing for new pickleball facilities and increase access to tennis and passive recreation for families.

CPA-Funded Recreation Projects

The CPA has provided funding for numerous recreational initiatives, enhancing Upton's facilities and services. Highlights include:

- Community Center Playground
- Four Parks Master Plan
- Kiwanis Beach Pavilion

- Kiwanis Parking Engineering and Design
- West River Street Soccer Field Irrigation
- Kiwanis Beach Tennis and Basketball Court Renovation

For a full list of funded projects see Appendix D.

Governance and Committees

Recreation Commission

The Upton Recreation Department is dedicated to offering diverse and high-quality programs to meet community needs. Recreation Director Maria Cherubino collaborates with the Recreation Commission to promote health, education, and social opportunities for all ages.

Current Commission Members:

Open Space and Recreation Plan (OSRP) 2020

Upton's OSRP, updated in 2020, outlines key goals to address the community's open space and recreation needs.

OSRP Goals: Recreation

1. *Preserve Upton's rural and small-town character.*
2. *Protect open space and water resources.*
3. ***Expand recreational facilities and trail systems.***
4. *Promote stewardship of town-owned conservation lands.*
5. *Foster environmental education and awareness.*

Needs

The 2020 **Open Space and Recreation Plan (OSRP)** identified a variety of recreation needs and opportunities in Upton. These findings were further informed by interviews with key stakeholders, providing deeper insights into community priorities.

The OSRP highlights the importance of protecting and enhancing Upton's recreation areas to meet the growing demand for diverse recreational opportunities. Identified priorities include:

- *Implementing the 2019 Four Parks Master Plan:* A strategic framework for improving and managing key recreational assets.
- *Acquisition of additional protected open space.*
- *Creation of an Off-Leash Dog Area:* A designated space for pet owners to safely exercise their dogs.

- *Improvement of Water Quality at Pratt Pond*: Addressing concerns related to pollution and environmental health.
- *Management of Invasive Weeds in Town Ponds*: Enhancing water-based recreation by controlling vegetation.
- *Improvement of the Boat Launch at Lake Wildwood*: Upgrading access for non-motorized and small motorized boats.
- *Collaboration with the Department of Conservation and Recreation (DCR)*: Developing accessible trails at Upton State Forest to ensure inclusivity and broaden access.

Recreation Commission Insights

A recent interview with the **Recreation Commission** underscored additional considerations related to recreation funding and planning. Key takeaways include:

- *Clarification of CPA Eligibility Criteria*: Members expressed the need for better guidance on what types of projects qualify for CPA funding.
- *Alignment with Town Goals*: The commission emphasized the importance of aligning project proposals with the goals outlined in the OSRP and other strategic plans.
- *Collaboration with the CPC*: The Recreation Commission uses the **Four Parks Master Plan** to prioritize projects and suggested that the CPC review the plan to identify potential collaborative opportunities. This partnership could help focus CPA funding on projects that align with both town and community priorities.

CPA Eligibility

Passive and active recreational use including, but not limited to, community gardens, trails, and noncommercial youth and adult sports, and the use of land as a park, playground or athletic field are eligible for CPA funding. This does not include horse or dog racing or the use of land for a stadium, gymnasium or similar structures such as bleachers. CPA funds may also be used for the acquisition, creation, preservation, rehabilitation and restoration of land for recreational use. Maintenance costs or the acquisition of artificial turf for athletic fields are not eligible.

Funding

Each year, the town is required to spend, or set aside for future spending, ten percent (10%) of total annual CPA revenues for recreational use (& open space) projects. Appendix D itemizes recreation projects that have used CPA funding to date.

SOURCES

Links for all sources referenced within this document are provided within the text. Additional information was provided by the following Town of Upton sources:

Town Accountant

Assessors' Office

Town Meeting Records

Various Town Offices, Departments, Committees, and Commissions

General Website Links

1. The Town of Upton Website www.uptonma.gov
2. Community Preservation Coalition www.communitypreservation.org (Helpful Information and references, including M.G.L. Chapter 44B)
3. Commonwealth of Massachusetts, www.mass.gov

APPLICATION REVIEW

Step 1: Initial Application Review

Applications will first be evaluated for:

1. **Eligibility:** Alignment with CPA legislation and the Community Preservation Plan.
2. **Completeness:** Inclusion of all required information and documentation.
3. **Impact:** Potential benefits to the local community and alignment with town priorities.

Step 2: Detailed Evaluation

Applications that pass the initial review will undergo a more detailed evaluation, focusing on:

1. **Funding Leverage:** Whether CPA funds act as a catalyst for other funding sources.
2. **Community Impact:** Breadth of impact on residents and alignment with underserved populations.
3. **Long-Term Benefits:** Sustainability and long-term value of the project to the town.
4. **Cost of Inaction:** Consequences of not funding the project.
5. **Urgency:** Timeliness and necessity of the project.
6. **Other Relevant Factors:** Any unique considerations specific to the project.

Following this review, the CPC will make funding recommendations to the Town Meeting, which will make the final decision on project funding.

Post-Funding Requirements

For non-municipal projects funded by the Town Meeting, the applicant will enter a contract with the Town of Upton outlining the project's scope, timeline, deliverables, payment terms, and any special conditions.

The CPC may impose the following conditions:

- **Permitting and Approvals:** Funding may be withheld until all required permits and approvals are obtained.
- **Performance Bonds:** Assurance mechanisms may be required to ensure project completion.
- **Funding Adjustments:** The CPC may recommend partial funding, full funding, or no funding, depending on project eligibility and merit.

Evaluation Priorities

Projects that address multiple CPA purposes (e.g., open space, historic preservation, affordable housing, and recreation) and demonstrate public engagement in the development process will be prioritized. Applicants must:

- Provide evidence of public support and alignment with community goals.
- Demonstrate the capability to complete the project within the proposed timeline and budget.

Specific Project Requirements

Historic Resource Projects:

- Applicants must provide a Historic Resource Inventory Form. A Historic Structure Report may be required before project initiation.

Land Acquisition (Open Space) Projects:

- A permanent conservation restriction will be required. Applicants must identify a restriction holder early during the review process.

Affordable Housing Projects:

Applicants must attempt to align their project with the following criteria:

- Consistency with community development and preservation goals as established through the Affordable Housing Trust Action Plan, Housing Production Plan, the most recent Master Plan, the Open Space and Recreation Plan, the Economic Development Plan, and any other relevant planning documents.

Recreation Projects:

Applicants must attempt to align their project with the following criteria:

- Consistency with recreation goals as established through the Open Space & Recreation Plan and the Four Parks Plan
- Enhancement of Accessibility and Inclusivity
- Investment in Recreational Infrastructure Upgrades

Evaluation Criteria

Applications will be assessed based on the following:

1. Alignment with CPA legislation.
2. Consistency with Upton's planning goals and initiatives.
3. Public and town board support.
4. Preservation or enhancement of existing town assets.
5. Accessibility to multiple or underserved populations.
6. Fulfillment of multiple CPA purposes.
7. Site control or owner consent.

8. Demonstrated financial need and leveraging of additional funding sources and/or volunteer support
9. Feasibility and reasonableness of the implementation plan.
10. Urgency and flexibility of the project timeline.
11. Inclusion of appropriate restrictions to protect resources.
12. Applicant's capacity to manage and complete the project.

Consideration Guidelines

The CPC will consider:

1. Preservation of threatened resources or opportunities.
2. Long-term community benefits.
3. Multi-source funding and collaboration potential.
4. Feasibility and reasonableness of the proposal.
5. Provisions for ongoing maintenance funding.

Community Input and Review

The CPC encourages informal inquiries and public input throughout the application process. Final decisions and funding recommendations will be discussed with the Select Board and Finance Committee before consideration at the town meeting.

For questions or guidance, contact the CPC Chair via email at cpc@uptonma.gov



TOWN OF UPTON

APPLICATION FOR

COMMUNITY PRESERVATION ELIGIBILITY

Date: _____

Project Title: _____

Name of Applicant: _____

Name of Organization: _____

Address: _____

Telephone: _____

Email: _____

CPA Category (circle all that apply): **Open Space** **Historic Preservation**
 Recreation **Community Housing**

CPA Funding Requested: \$ _____ **Total Project Cost:** \$ _____

Project Description: Please provide a brief project description below. Include a brief description of how your project accomplishes the goals of the CPA and include an estimated budget. Please include supporting materials, as necessary.

NOTE: This application enables the CPC to review the request to ensure eligibility and offer guidance. If eligible, an Application for Funding must be completed.



TOWN OF UPTON

APPLICATION FOR

COMMUNITY PRESERVATION FUNDING

Date:

Project Title: _____

Name of Applicant: _____

Name of Organization: _____

Address: _____

Telephone:

Email:

CPA Category (circle all that apply): **Open Space** **Historic Preservation**
 Recreation **Community Housing**

CPA Funding Requested: \$ _____ **Total Project Cost:** \$ _____

Application Requirements

Applicants must submit one (1) original, two (2) printed copies, and one (1) digital PDF of the following materials:

1. **CPA Application Cover Page:** Fully completed Eligibility and Funding Form.
2. **Project Summary:** A concise 1-2 paragraph overview detailing the project category, goals, scope, and budget.
3. **Location Map:** MassMapper, GIS, or Assessor's map showing the project location, along with additional maps and imagery if applicable.
4. **Narrative:** Detailed description of the project, its relevance to CPA goals, implementation plan (including public outreach), and measurable outcomes. Note other proposed funding and volunteer support.
5. **Evaluation Criteria Responses:** Explanation of how the project addresses applicable evaluation criteria.
6. **Budget:** Comprehensive budget with funding breakdown by year, source, and CPA category, including administrative expenses.
7. **Feasibility:** Supporting available feasibility studies or reports, along with a summary of required approvals or permits.
8. **Timeline:** Key milestones and anticipated completion dates.
9. **Visual Materials:** Relevant plans, drawings, site photos, or architectural renderings.
10. **Letters of Support:** From community groups, organizations, or stakeholders (encouraged but not required).

General Criteria for CPA Projects Satisfied by Proposed Project

| Criteria | Response |
|---|----------|
| Eligible for Community Preservation Act (CPA) funding. | |
| Consistent with the Upton Master Plan, Open Space Plan 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. | |
| Respond to documented needs. | |
| Save resources that would otherwise be threatened. | |
| Serve more than one CPA purpose. | |
| 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. | |
| Receive endorsement by other municipal boards or departments. | |
| Serve the whole community or a significant part of the population. | |

APPENDICES

Appendix A

| Housing CPA Projects | | | |
|---|---|---------------|----------|
| Project Name | Description | Approval Date | Status |
| 28 Hartford Ave N | Construction of affordable single-family home at 28 Hartford Ave N. | 5/01/2025 | Active |
| Affordable Housing Trust Plan | Funds to be used for the purpose of creating an Affordable Housing Trust Plan. | 11/07/23 | Complete |
| Transfer of CPA Funds to Affordable Housing Trust | Funds to be used in accordance with the CPA statutes and guidelines for community housing. | 11/07/23 | Complete |
| Funding Affordable Housing Trust | Transfer of funds to the recently established Affordable Housing Trust to establish funds to respond to opportunities for affordable housing. | 11/18/2014 | Active |
| Analysis of affordable housing needs for Upton | These funds will be used to analyze the affordable housing situation and result in the creation of a plan and strategy for the town. | 5/6/2010 | Complete |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bcstwv3d3%3Fa%3Dq&qid=37

Note: Affordable Housing Trust funds (\$172,235) transferred from CPA in 2014 were used by trust to purchase a property on Jan 3, 2018.

Appendix B

| Historic Resources CPA Projects | | | |
|---|---|---------------|-------------------------|
| Project Name | Description | Approval Date | Status |
| The Grange Hall/Center School No. 1 Exterior Restoration Project | The restoration of the exterior of the Grange Hall/Center School No. 1, located at 26 School Street, listed on the Massachusetts Register of Historic Places, to include a new roof, siding and trim repairs, handicap accessible ramp repairs, exterior painting, and general landscape improvements in an effort to stabilize the exterior of the building. | 5/4/2023 | Complete |
| Heritage Park Sign | Upton Historical Commission to purchase and install a new wood Heritage Park sign with a lifespan of one hundred years. | 5/4/2023 | Complete |
| Maplewood Cemetery Stone Wall Restoration | Restore and repair the stone wall at Maplewood Cemetery. | 11/2/2021 | Complete |
| Barbara Burke Bench | Purchase and install a park bench in honor of Barbara Burke at Heritage Park. | 5/8/2021 | Complete |
| Restoration of a multipurpose building in Maplewood Cemetery | The multipurpose stone building at Maplewood Cemetery built in 1905 has a slate roof with copper flashing which needed to be restored to maintain the integrity of the building which is a landmark in Upton. The interior will also be painted to finish the restoration. | 3/4/2020 | Complete |
| Professional Documentation of historic properties | A fund was established to professionally document historic properties prior to demolition through pictures and historic records. | 9/5/2018 | Project Canceled |
| Markers for Historic Schoolhouse Sites | Purchase and installation of granite posts to which bronze plaques are attached to mark the location of the historic sites of original public schools in the Town of Upton. | 5/3/2018 | Complete |
| Preservation of Schoolhouse Site | Rehabilitation and preservation of old school site #6 by removing trees and snags that are encroaching on the foundation located at the original building site. | 11/17/2017 | Complete |
| Purchase and Installation of Signage for Historic District | Upton Historical Commission is installing signage to delineate a historic district in the Town of Upton. | 5/4/2017 | Complete |
| Preservation at First Cemetery | Removal of hazardous and diseased trees which threaten historic headstones in the First Cemetery which dates from 1700's. Also includes repair, when possible, of damaged stones. | 5/8/2014 | Complete |
| Reconstruction phase of Upton Town Hall | Reconstruction and Rehabilitation of Upton Town Hall to conform to ADA and state and federal building codes, to accommodate town offices and to preserve an historic town hall which is on the National Register of Historic buildings. | 5/9/2013 | Complete |
| Cemetery Records preservation | Funds to copy historic cemetery records, treat and bind them to prevent further deterioration and digitize them to provide a searchable database. | 5/9/2013 | Complete |
| Engineering Design Phase of Town Hall Renovation | Now that the schematic design is complete, detailed engineering drawings must be completed. | 4/4/2012 | Complete |
| Upton Town Hall schematic Design documents | Development of schematic design documents for the renovation and preservation of the Upton Town Hall building with improvements to comply with the ADA and other building codes and to provide office space for departments and boards. | 5/5/2011 | Complete |
| Archeological Study and Chamber repair | Request to conduct an archeological study of chamber in Heritage Park and for restoration and stabilization of the entrance. | 5/5/2011 | Complete |
| Repair historic town clock | Historic Town Clock needed some of the works replaced in preparation for the 275th town anniversary. | 3/9/2010 | Complete |
| Replace window sashes in Town Hall | The grant was to replace 14 Town Hall windows upon the recommendation of the Windows Selection Committee. The replacements did not meet MA Historical Commission standards, so project was cancelled | 11/11/2009 | Complete |
| Preparation of bid documents to replace historic windows in Upton Town Hall | The request is for the evaluation and preparation of bidding documents to repair or replace sixteen historic windows in the regularly occupied portion of the Upton Town Hall. | 5/04/2009 | Complete |
| Study to rehabilitate historic Town Hall | Funding for a detailed evaluation for the proposed preservation and rehabilitation of the Upton Town Hall, including improvements to comply with ADA and other building or access codes. | 5/04/2009 | Complete |
| National Register Evaluation and Application | To finance the evaluation of structures and places for the National Register of Historic Places and to complete the appropriate applications and nomination forms. | 3/10/2008 | Complete |

Community Preservation Plan

| | | | |
|------------------------------------|---|------------|-----------------|
| Historic Town Records preservation | To fund the preservation of historic Town Records | 5/10/2007 | Complete |
| Elm St land acquisition | To preserve and protect an historical landmark, "The Cave," to provide space for recreation purposes, and to provide and protect open space around the shores of our "Mill Pond." | 8/14/2006 | Complete |
| Upton Chamber property | For the Upton Chamber property to allow the Town to evaluate the costs and benefits of acquiring the land and consider it for public use | 3/30/2006 | Complete |
| Police Station steps | To fund the repair and reconstruction of the Police Station steps to preserve the historic integrity and aesthetics of the original building | 3/30/2006 | Complete |
| Cemetery Records preservation | For the transcriptions of cemetery records to computer format | 11/30/2004 | Complete |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bcstwv3d3%3Fa%3Dq&qid=37

Appendix C

| Open Space CPA Projects | | | |
|---|---|---------------|-----------------|
| Project Name | Description | Approval Date | Status |
| Acquisition Due Diligence Costs for 47 Mechanic St. | Protection or acquisition of 15 acres of rear land at 47 Mechanic St | 5/2/2024 | Active |
| Warren Brook Trail Bridge | Funds to be used for the purpose of repairs a trail bridge at the Warren Brook Watershed Conservation Area. | 11/7/2023 | Complete |
| Funding for Water Quality Testing and Equipment | Funds to be used for the purpose of purchasing water quality sampling and testing equipment and analytical services for water quality services. | 11/7/2023 | Complete |
| Preparation of Pratt Pond and Mill Pond Management and Water Quality Plan | Funds to be used for the purpose of preparation of a management and water quality monitoring plan for Pratt Pond and Mill Pond. | 11/7/2023 | Active |
| Warren Brook Bridge- Robertson Property | Construction of a trail bridge for public use across Warren Brook on the Robertson Family Conservation Restriction Area Trail Easement. | 5/4/2023 | Active |
| Pratt Pond and Mill Pond Health and Use Study | Water and sediment Quality Study of Pratt Pond and Mill Pond, including the establishment of a water quality monitoring program and the development of long-term management for the ponds. | 11/1/2022 | Complete |
| Mechanic Street Acquisition | Acquire, for open space and recreation purposes, approximately 94.22 acres of land on Mechanic Street/Fowler Street. CR to be held by Sudbury Valley Trustees. | 5/5/2022 | Complete |
| Land purchase of Kelly property | Purchase of 42.4 acres of land adjacent to the existing Peppercorn Hill town conservation land. It is a wooded area with an existing trail system which is heavily used. It is managed by the Town of Upton Land Stewardship Committee, with a CR held by Sudbury Valley Trustees | 10/7/2020 | Complete |
| Community garden water supply | The town community garden did not have an on-site water supply although the water lines ran on the street. The funding of \$15,000 was requested to pay for the installation of a water connection to the community garden site which allowed people of all abilities to access water in their garden plots. The work was done by the DPW in conjunction with the land management group. | 10/7/2020 | Complete |
| Conservation Restriction on Robertson Property | This conservation restriction applies to approximately 50 acres of mixed habitat with a cold-water stream crossing the property. It abuts both Town and DCR property and is considered environmentally significant. The CR is held by the Town of Upton Conservation Commission and the Department of Conservation and Recreation. | 11/05/2019 | Complete |
| Access to Stefan's Farm | Engineering services to evaluate access road alternatives to Stefan's Farm conservation area. | 11/17/2015 | Complete |
| Sweetwilliam Farm - Purchase of land and CR | Purchased 63.06 acres of farm property and established a Conservation Restriction on another 32.65 acres. Totals 95.71 acres. It includes an easement for a trail that will link town owned land with the Upton State Forest property. This property is also historic since it was owned by relatives of Eli Whitney, including his grandfather and cousin. The purchase was contingent upon a \$500,000 land grant from the Massachusetts Division of Conservation | 1/11/2011 | Complete |

Community Preservation Plan

| | | | |
|--|---|------------|-------------------------|
| | Services. The 63-acre parcel now owned by the town is known as the Whitney Conservation Area. The town also purchased a parking easement. Assessors Map 5, Parcels 5-4, 5-16, 5-17, and 5-17.1 | | |
| Footbridge construction in conservation area | These funds were used to help purchase the materials required to build a footbridge across a wet area in the Warren Brook watershed. | 5/7/2010 | Complete |
| Elm St land acquisition (Heritage Park) | To preserve and protect an historical landmark, "The Cave," to provide space for recreation purposes, and to provide and protect open space around the shores of Mill Pond. The 7 acre property is now known as Heritage Park. The Metacomet Land Trust holds a CR. | 8/14/2006 | Complete |
| Stockwell property purchase option | To acquire an option to purchase all or a portion of the Stockwell property located on Mendon Street described below for open space, recreation and other CPA related uses. Project approved by town meeting but lost ballot vote. | 5/02/2005 | Project Canceled |
| Undeveloped land parcel study ("Dodson Study") | To do a comprehensive study of large, undeveloped parcels of land to identify those areas with the highest open space value and the potential for community use. | 11/30/2004 | Open Space |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bcstwv3d3%3Fa%3Dq&qid=37

Appendix D

| Recreation CPA Projects | | | |
|---|---|---------------|------------------|
| Project Name | Description | Approval Date | Status |
| Playground Funding | \$520,000 to fund the construction of a new playground at the new Community Center located at 0 Milford Street. | 5/8/2021 | Complete |
| Leland Field Engineering | Leland Recreation complex adjacent to Memorial School requires major renovations to accommodate the needs of the town recreation programs. Courts and fields need significant engineering design reconfiguration work to meet the standards for such facilities. CPA funds will share the share of the projects with the Town Recreation Commission. Although funded, this project was not implemented. | 6/23/2020 | Project Canceled |
| Create Recreation Master Plan | Provide partial funding for a master plan for the Recreation Commission. Demographics have changed dramatically in the last 10 years, and an assessment needs to be done on what exists and what is needed to meet recreational needs in the Town of Upton. | 5/3/2018 | Complete |
| Update walkway at Kiwanis Soccer Field to meet ADA requirements | The walkway from the parking area to the soccer field does not meet ADA requirements. The slope needs to be adjusted, and railings added. | 11/17/2017 | Complete |
| Lake Wildwood Restoration | Restoration and rehabilitation of land for recreational purposes, specifically the treatment of Lake Wildwood for the eradication of invasive weeds. | 11/17/2015 | Complete |
| Construction of access road to Kiwanis soccer field | Rehabilitation and capital improvement of land for recreational and safety purposes - bidding, construction, and administration necessary to install a new access road and parking area adjacent to upper soccer field at Kiwanis Beach recreation area. | 11/17/2015 | Complete |
| Replacement of exterior stairs at Kiwanis | Repair or replace the exterior staircase and landing on the Ramsay Building at Kiwanis Beach | 2/11/2015 | Complete |
| Surveillance Equipment at Kiwanis | Purchase and install additional surveillance equipment to protect Kiwanis Beach basketball and tennis court areas which are being reconstructed. | 5/8/2014 | Complete |
| Shed Foundation | Provide slab foundation for a recreational equipment shed which is being built behind Memorial School as an Eagle project by a local Boy Scout and purchase a garage door to secure the property. | 5/8/2014 | Complete |
| Kiwanis Court Renovation | Project will reconstruct basketball and tennis courts which are presently unusable including fencing and netting. Courts are located adjacent to the town recreation area at Kiwanis Beach. | 5/8/2014 | Complete |
| Kiwanis parking engineering and design | Funds to survey and develop engineering plans for handicapped parking and access at Kiwanis soccer field. | 5/8/2014 | Complete |
| Skating Rink Berm | Funds to install a berm around the edge of the tennis court behind Memorial School to convert to skating rink for winter months. | 11/19/2013 | Complete |
| Surveillance System at Leland Field | Install surveillance cameras at Leland Recreational Fields located behind Memorial School to monitor activities and protect facilities and equipment shed. | 10/19/2013 | Complete |
| Rehabilitation of Upton Veterans Memorial Playground | Fund to restore and rehabilitate the town playground by replacing surface material, replace benches and picnic tables, purchase and install new equipment. | 5/9/2013 | Complete |
| Pavilion construction | Fund to assist in the purchase of material to construct a pavilion at the town beach for use by the summer recreation program and other groups. Additional funding for electrical and sound paging system. | 5/9/2013 | Complete |

Community Preservation Plan

| | | | |
|---|--|------------|---------------|
| Preservation of Howard Leland Field | These funds were used for the preservation of an athletic field by mitigating drainage and irrigation problems. | 5/6/2010 | Complete |
| Glen Echo Field Design | Funds for survey and to complete design of athletic field. | 9/18/2007 | Complete |
| West River St irrigation | For the installation of an automatic underground irrigation system at a Town owned public soccer field on West River Street | 3/13/2007 | Complete |
| Glen Echo athletic fields environmental filings | To fund final design services for filing with the Conservation Commission and Planning Board, and to fund rare species habitat analysis, and filings with the Massachusetts Natural Heritage and Endangered Species program, and wetland Notice of Intent for the proposed Glen Echo athletic field and associated parking, which design shall attempt to preserve the foundation of the District Schoolhouse Number 6, and which may include preliminary plans for a footbridge crossing of an intermittent stream, such project to be managed by the Upton Recreation Commission. Due to high estimated construction cost the project was never built. | 1/16/2007 | Complete |
| Athletic Fields Plan | To fund an engineering concept plan and an environmental review for the construction of athletic fields on land being deeded to the Town as part of the Glen-Echo Development on North Street with the construction of fields and related parking areas and pathways | 12/6/2005 | Complete |
| Recreational needs study | To assess the current and future recreation needs of the Town | 4/12/2005 | Complete |
| New trail complex | To assist in the development of an athletic/nature trail complex on Chestnut Street which would be available to Upton residents when not in use by the school, the project to be overseen by the Blackstone Valley School District. The project was not implemented. | 11/30/2004 | Not Completed |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bcstwv3d3%3Fa%3Dq&qid=37

Appendix E

| Upton Election of CPA | | | | | | | | |
|-----------------------|-----------------------|-------------|---|---------------|--------|-------|------|----------------|
| 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 | 5/5/2003 | Pass | 51% | 49% | ✓ |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg|a=dr&rid=341

Appendix F

| CPA Revenue 2002-2025 | | | | |
|-----------------------|--------------------|-------------------------------|------------|--|
| Fiscal Year | Local Surcharge | Total Trust Fund Distribution | Percentage | Total Revenue (Local Surcharge + Distribution) |
| 2002 | | | | \$0 |
| 2003 | | | | \$0 |
| 2004 | \$177,832 | | | \$177,832 |
| 2005 | \$223,744 | \$177,832 | 100% | \$401,576 |
| 2006 | \$241,693 | \$223,744 | 100% | \$465,437 |
| 2007 | \$251,203 | \$241,693 | 100% | \$492,896 |
| 2008 | \$275,784 | \$251,203 | 100% | \$526,987 |
| 2009 | \$275,720 | \$275,221 | 99.80% | \$550,941 |
| 2010 | \$287,126 | \$167,506 | 60.75% | \$454,632 |
| 2011 | \$305,780 | \$140,278 | 48.86% | \$446,058 |
| 2012 | \$316,300 | \$137,947 | 45.11% | \$454,247 |
| 2013 | \$318,118 | \$155,437 | 49.11% | \$473,555 |
| 2014 | \$331,233 | \$312,711 | 98.30% | \$643,944 |
| 2015 | \$344,783 | \$195,448 | 59% | \$540,231 |
| 2016 | \$386,689 | \$190,051 | 55.40% | \$576,740 |
| 2017 | \$410,775 | \$144,368 | 37.33% | \$555,143 |
| 2018 | \$430,588 | \$127,046 | 31% | \$557,634 |
| 2019 | \$444,516 | \$161,526 | 37.51% | \$606,042 |
| 2020 | \$473,692 | \$196,836 | 44.28% | \$670,528 |
| 2021 | \$490,186 | \$261,455 | 55.20% | \$751,641 |
| 2022 | \$515,046 | \$418,094 | 85.29% | \$933,140 |
| 2023 | \$579,980 | \$384,193 | 74.59% | \$964,173 |
| 2024 | \$608,713 | \$227,637 | 39.25% | \$836,350 |
| 2025 | 0 | \$206,822 | | \$206,822 |
| TOTAL | \$7,689,502 | \$4,597,048 | | \$12,286,550 |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bbzvidkqg/a=dr&rid=341

Appendix G

| CPA Bonded Projects | | | | | |
|----------------------------|---|--------------------------|------------------|------------------------|---|
| Approval Year | Project Name | CPA Bonded Amount | Bond Term | CPA Total Funds | Total Cost (CPA Funds + Leveraged Funds) |
| 2013 | Reconstruction phase of Upton Town Hall | \$6,147,300 | 20 | \$6,147,300 | \$6,182,627 |

Source: CPC Website https://www.communitypreservation.org/cpc-report?report_src=bcstwv3d3%3Fa%3Dq&qid=12

Town Meeting Authorized Bond Payments

| Year | Amount |
|--------------|---------------------|
| <u>2025</u> | <u>\$268,561</u> |
| <u>2024</u> | <u>\$266,841</u> |
| <u>2023</u> | <u>\$270,328</u> |
| <u>2022</u> | <u>\$269,131</u> |
| <u>2021</u> | <u>\$266,478</u> |
| <u>2020</u> | <u>\$296,575</u> |
| <u>2019</u> | <u>\$296,575</u> |
| <u>2018</u> | <u>\$291,975</u> |
| <u>2017</u> | <u>\$292,175</u> |
| <u>2016</u> | <u>\$292,050</u> |
| <u>2015</u> | <u>\$291,775</u> |
| <u>2014</u> | <u>\$293,684.50</u> |
| <u>2013</u> | <u>\$118,848.28</u> |
| Total | \$3,514,997 |

Appendix H

| Upton CPA Projects & Appropriations by Category | | | |
|--|----------------------|-----------------------------------|------------------------------|
| Project | Primary Purpose | Town Meeting Date | Appropriation or Actual Cost |
| Cemetery Records Preservation | Historic | 11/30/2004 | \$3,000 |
| Police Station Steps | Historic | 3/30/2006 | \$14,520 |
| Elm Street Didson Study | Historic | 3/30/2006 | \$3,500 |
| Town Records Preservation | Historic | 5/10/2007 | \$76,173 |
| National Register Study | Historic | 3/10/2008 | \$20,000 |
| Clock Repair | Historic | 3/9/2010 | \$6,500 |
| Upton Chamber Study and Repair | Historic | 5/5/2011 | \$24,500 |
| Cemetery Records Preservation | Historic | 5/9/2013 | \$15,103 |
| First Cemetery Preservation | Historic | 5/8/2014 | \$12,000 |
| Historic District Signage | Historic | 5/4/2017 | \$6,000 |
| Schoolhouse Site Preservation | Historic | 11/17/2017 | \$10,000 |
| Schoolhouse Site Markers | Historic | 5/3/2018 | \$6,000 |
| Maplewood Cemetery Building Restoration | Historic | 3/4/2020 | \$7,500 |
| Barbara Burke Bench | Historic | 5/8/2021 | \$2,100 |
| Maplewood Cemetery Wall Restoration | Historic | 11/2/2021 | \$40,000 |
| Heritage Park Sign | Historic | 5/4/2023 | \$1,380 |
| Grange Restoration | Historic | 5/4/2023 | \$120,000 |
| Documentation of Historic Properties | Historic | 9/5/2018 | \$0 |
| Cemetery Records Preservation | Historic | 11/30/2004 | \$3,000 |
| Police Station Steps | Historic | 3/30/2006 | \$14,520 |
| Elm Street Didson Study | Historic | 3/30/2006 | \$3,500 |
| Town Records Preservation | Historic | 5/10/2007 | \$76,173 |
| National Register Study | Historic | 3/10/2008 | \$20,000 |
| Clock Repair | Historic | 3/9/2010 | \$6,500 |
| Upton Chamber Study and Repair | Historic | 5/5/2011 | \$24,500 |
| Cemetery Records Preservation | Historic | 5/9/2013 | \$15,103 |
| First Cemetery Preservation | Historic | 5/8/2014 | \$12,000 |
| Historic District Signage | Historic | 5/4/2017 | \$6,000 |
| Schoolhouse Site Preservation | Historic | 11/17/2017 | \$10,000 |
| Schoolhouse Site Markers | Historic | 5/3/2018 | \$6,000 |
| Maplewood Cemetery Building Restoration | Historic | 3/4/2020 | \$7,500 |
| Barbara Burke Bench | Historic | 5/8/2021 | \$2,100 |
| Maplewood Cemetery Wall Restoration | Historic | 11/2/2021 | \$40,000 |
| Heritage Park Sign | Historic | 5/4/2023 | \$1,380 |
| Grange Restoration | Historic | 5/4/2023 | \$120,000 |
| Documentation of Historic Properties | Historic | 9/5/2018 | \$0 |
| | | Total Historic | \$368,276 |
| Town Hall Rehab Study | Historic - Town Hall | 5/4/2009 | \$55,300 |
| Town Hall Window Bid Documents | Historic - Town Hall | 5/4/2009 | \$27,000 |
| Town Hall Window Sashes | Historic - Town Hall | 11/11/2009 | \$40,164 |
| Town Hall Design | Historic - Town Hall | 5/5/2011 | \$75,000 |
| Town Hall Engineering and Design | Historic - Town Hall | 4/4/2012 | \$398,000 |
| Town Hall Reconstruction | Historic - Town Hall | 5/9/2013 | \$6,147,300 |
| | | Total Historic - Town Hall | \$6,742,764 |

Community Preservation Plan

| | | | |
|--|--------------------|---------------------------------|--------------------|
| Affordable Housing Trust Plan | Affordable Housing | 5/7/2010 | \$16,000 |
| Fund Transfer to Affordable Housing Trust | Affordable Housing | 11/18/2014 | \$200,000 |
| Affordable Housing Trust Plan | Affordable Housing | 11/7/2023 | \$15,000 |
| Fund Transfer to Affordable Housing Trust | Affordable Housing | 11/7/2023 | \$100,000 |
| 28 Hartford Ave N Construction Costs | Affordable Housing | 5/1/2025 | \$160,000 |
| | | Total Affordable Housing | \$491,000 |
| Lake Wildwood Restoration | Lakes & Ponds | 11/17/2015 | \$24,000 |
| Pratt and Mill Pond Water/Sediment Quality Study | Lakes & Ponds | 11/1/2022 | \$39,900 |
| Water Quality Testing and Equipment | Lakes & Ponds | 11/7/2023 | \$4,500 |
| Pratt and Mill Pond Management Plan | Lakes & Ponds | 11/7/2023 | \$50,000 |
| | | Total Lakes & Ponds | \$118,400 |
| Dodson Open Space Study | Open Space | 11/30/2024 | \$35,570 |
| Stockwell Farm Acquisition | Open Space | 5/2/2005 | \$0 |
| Heritage Park Acquisition | Open Space | 8/14/2006 | \$400,000 |
| Warren Brook Conservation Area Footbridge | Open Space | 5/7/2010 | \$2,000 |
| Sweetwilliam Farm Acquisition | Open Space | 1/11/2011 | \$614,500 |
| Access to Stefans Farm Study | Open Space | 11/17/2015 | \$17,000 |
| Robertson CR | Open Space | 11/5/2019 | \$176,286 |
| Kelly Property Acquisition | Open Space | 10/7/2020 | \$207,000 |
| Community Garden Water Supply | Open Space | 10/7/2020 | \$15,000 |
| Mechanic St. Acquisition | Open Space | 5/5/2022 | \$743,000 |
| Waren Brook (Robertson) Trail Bridge | Open Space | 5/4/2023 | \$120,000 |
| Warren Brook Footbridge Repair | Open Space | 11/7/2023 | \$5,000 |
| 47 Mechanic St. Due Diligence Costs | Open Space | 5/2/2024 | \$12,500 |
| | | Total Open Space | \$2,347,856 |
| Chestnut St. Athletic field Complex Recreation | Recreation | 11/30/2004 | \$12,000 |
| Recreation Needs Study | Recreation | 4/12/2005 | \$12,000 |
| Glen Echo Field Concept Design | Recreation | 12/6/2005 | \$10,000 |
| West River Irrigation | Recreation | 3/13/2007 | \$20,600 |
| Glen Echo Field Design | Recreation | 1/16/2007 | \$35,000 |
| Glen Echo Field Design | Recreation | 9/18/2007 | \$12,000 |
| Preservation of Leland Field | Recreation | 5/7/2010 | \$50,000 |
| Rehab of Veterans Memorial Playground | Recreation | 5/9/2013 | \$60,000 |
| Kiwanis Pavilion Construction | Recreation | 5/9/2013 | \$10,962 |
| Skating Rink Berm | Recreation | 11/19/2013 | \$4,600 |
| Surveillance Equipment at Leland | Recreation | 11/19/2013 | \$4,119 |
| Surveillance Equipment at Kiwanis | Recreation | 5/8/2014 | \$7,140 |
| Shed Foundation at Memorial School | Recreation | 5/8/2014 | \$2,500 |
| Kiwanis Court Restoration | Recreation | 5/8/2014 | \$146,000 |
| Kiwanis Parking Engineering and Design | Recreation | 5/8/2014 | \$12,500 |
| Kiwanis Stairs | Recreation | 2/11/2015 | \$8,500 |
| Kiwanis Access Rd. | Recreation | 11/17/2015 | \$159,000 |
| Kiwanis Walkway ADA Improvements | Recreation | 11/17/2017 | \$25,000 |
| Recreation Master Plan | Recreation | 5/3/2018 | \$17,500 |
| Leland Field Engineering | Recreation | 6/23/2020 | \$0 |
| Community Center Playground | Recreation | 5/8/2021 | \$520,000 |
| | | Total Recreation | \$1,129,421 |

Appendix I

Upton Historical Inventory

| Inv. No. | Property Name | Street | Town | Year | Designations |
|----------|--|-----------------------|-------|--------|--------------|
| UPT.A | Upton Center | | Upton | | |
| UPT.B | West Upton | | Upton | | |
| UPT.C | Upton Center North | | Upton | | |
| UPT.D | Perham Tavern | | Upton | | |
| UPT.E | Upton State Forest Civilian Conservation Corp Camp | | Upton | | |
| UPT.F | Knowlton Hat Factory | | Upton | | NRIND; |
| UPT.G | Upton State Forest - Park Loop Road Area | | Upton | | |
| UPT.H | Upton Center Historic District | | Upton | | NRDIS; |
| UPT.I | Upton State Forest - Civilian Conservation Corps | | Upton | | NRDIS; |
| UPT.261 | Stoddard, Elijah House | 10 Brooks St | Upton | C 1830 | |
| UPT.128 | Warren, Levi House | 1 Centennial Ct | Upton | C 1836 | |
| UPT.129 | Warren Tavern | 3 Centennial Ct | Upton | C 1830 | |
| UPT.130 | Warren Tavern | 5 Centennial Ct | Upton | C 1835 | |
| UPT.4 | Mosso, Nelson House | 2 Central Sq | Upton | 1948 | NRDIS; |
| UPT.5 | Wood, Samuel W. House | 3 Central Sq | Upton | C 1835 | NRDIS; |
| UPT.246 | Wood, Seth Boot Shop | Chestnut St | Upton | C 1788 | |
| UPT.308 | Smith, O. - Johnson, Henry Dexter House | 10 Christian Hill Rd | Upton | 1745 | |
| UPT.296 | Work, Robert House | 110 Christian Hill Rd | Upton | C 1742 | |
| UPT.3 | Upton First Congregational Church | 1 Church St | Upton | 1848 | NRDIS; |
| UPT.193 | | 7 Church St | Upton | R 1920 | NRDIS; |
| UPT.915 | Upton Center Curb - Stone Wall - Pier System | 7 Church St | Upton | R 1850 | NRDIS; |
| UPT.194 | Stadler, Albert House | 10 Church St | Upton | R 1860 | NRDIS; |
| UPT.173 | Stoddard, Hartford House | 13 Church St | Upton | 1833 | NRDIS; |
| UPT.174 | Stoddard, Hartford House | 15 Church St | Upton | 1839 | NRDIS; |
| UPT.345 | Upton Center Fire Station | 20 Church St | Upton | 1990 | NRDIS; |
| UPT.912 | Upton State Forest - Painted Valley Picnic Area | Dean Pond Rd | Upton | 1937 | NRDIS; |
| UPT.328 | Knowlton, William Blacksmith Shop | Depot St | Upton | R 1780 | |
| UPT.327 | West Upton Railroad Depot and Freight Office | Depot St | Upton | 1890 | |
| UPT.135 | | 1A-1B Driscoll Ln | Upton | | |
| UPT.136 | | 3 Driscoll Ln | Upton | 1870 | |
| UPT.293 | Rockwood, Josiah House | 11 East St | Upton | C 1790 | |
| UPT.294 | Fiske House | 26 East St | Upton | C 1851 | |
| UPT.295 | Putnam, Daniel House | 79 East St | Upton | C 1820 | |
| UPT.274 | Ruggles, Jeremiah Double House | 1 Elm St | Upton | 1784 | |
| UPT.275 | | 4 Elm St | Upton | C 1900 | |
| UPT.276 | Hill, John House | 5 Elm St | Upton | C 1835 | |
| UPT.277 | Hill, John House | 7 Elm St | Upton | 1822 | |
| UPT.278 | Rockwood, Francis Alexis House | 20 Elm St | Upton | 1849 | |
| UPT.279 | Fisk, Levi House | 21 Elm St | Upton | 1851 | |
| UPT.280 | Fisk, Eron Augustus House | 22 Elm St | Upton | 1850 | |
| UPT.281 | Ruggles, Luther House | 24 Elm St | Upton | C 1824 | |
| UPT.282 | Harrington, Charles P. House | 28 Elm St | Upton | 1848 | |
| UPT.283 | Harrington, Curtis N. House | 32 Elm St | Upton | 1848 | |
| UPT.284 | Goddard, George House | 45 Elm St | Upton | 1851 | |
| UPT.285 | Hayward, William House | 52 Elm St | Upton | 1750 | |
| UPT.329 | Upton District #2 Schoolhouse | 61 Elm St | Upton | 1851 | |
| UPT.286 | Brooks, William House | 64 Elm St | Upton | 1810 | |
| UPT.287 | Bowers, Henry N. House | 75 Elm St | Upton | 1845 | |
| UPT.288 | Holbrook, John Jr. House | 84 Elm St | Upton | R 1885 | |
| UPT.289 | Rockwood, Lewis House | 85 Elm St | Upton | 1849 | |
| UPT.290 | Southland, W. House | 92 Elm St | Upton | R 1855 | |
| UPT.291 | Wood, Elijah House | 133 Elm St | Upton | 1823 | |
| UPT.326 | Emerson, Willard G. House | 15 Farm St | Upton | 1849 | |
| UPT.297 | Green, John House | 1 Fisk Mill Rd | Upton | C 1800 | |
| UPT.227 | Upton Schoolhouse | 46 Fowler St | Upton | 1849 | |
| UPT.228 | Warren, Silas House | 86 Fowler St | Upton | C 1740 | |
| UPT.267 | Walker, Ebenezer W. - Walker, C. W. House | 10 Gable St | Upton | 1730 | |
| UPT.270 | Torrey, James House | 19 Glen View St | Upton | 1754 | |
| UPT.271 | Tenney, Moses House | 67 Glen View St | Upton | 1763 | |
| UPT.272 | Walker, Ezra House | 115 Glen View St | Upton | C 1835 | |
| UPT.273 | Gibbs, George Washington House | 122 Glen View St | Upton | C 1832 | |
| UPT.320 | Hi Tension Rabbit Ranch | 2 Gore Rd | Upton | C 1915 | |

Community Preservation Plan

| | | | | | |
|---------|---|-----------------------|-------|--------|-------------------|
| UPT.11 | Stoddard, Elijah - Aldrich, Sylvanus B. Store | 2 Grove St | Upton | 1833 | NRDIS; |
| UPT.254 | Wood, Joseph II House | 8 Grove St | Upton | 1843 | |
| UPT.255 | Stoddard, Elijah House | 14 Grove St | Upton | 1846 | |
| UPT.256 | Stoddard, Elijah House | 16 Grove St | Upton | 1846 | |
| UPT.257 | Wood, Simeon House | 33 Grove St | Upton | 1839 | |
| UPT.258 | Hagen - Phelps, A. C. House | 67 Grove St | Upton | C 1851 | |
| UPT.259 | Morse, William H. House | 81 Grove St | Upton | 1849 | |
| UPT.260 | Upton District #4 Schoolhouse | 91 Grove St | Upton | C 1851 | |
| UPT.342 | Hall, N. Barn, and Silo | 105 Grove St | Upton | | |
| UPT.242 | Hall, N. House | 105 Grove St | Upton | R 1860 | |
| UPT.800 | Upton Old First Cemetery | 106 Grove St | Upton | 1735 | |
| UPT.233 | Pierce, Joel House | 14 Hartford Ave North | Upton | 1831 | |
| UPT.98 | Batchelor, Amos House | 1 Hartford Ave South | Upton | 1846 | |
| UPT.96 | Cobbett, Henry Augustus House, and Store | 2 Hartford Ave South | Upton | 1875 | |
| UPT.97 | Batchelor, Eli W. House | 4 Hartford Ave South | Upton | 1890 | |
| UPT.207 | Perham - Warren Tavern | 21 Hartford Ave South | Upton | R 1750 | |
| UPT.208 | Perham - Warren Tavern | 24 Hartford Ave South | Upton | R 1750 | |
| UPT.209 | Perham - Warren Tavern | 26 Hartford Ave South | Upton | R 1750 | |
| UPT.310 | Parmenter, Asa House | 101 High St | Upton | 1850 | |
| UPT.311 | Taft, Titus Vespasian House | 104 High St | Upton | 1833 | |
| UPT.312 | Stoddard, Ezekiel Bates House | 106 High St | Upton | 1849 | |
| UPT.321 | Perry, Annis House | 24 Hopkinton Rd | Upton | 1830 | |
| UPT.322 | | 34 Hopkinton Rd | Upton | R 1925 | |
| UPT.323 | Forbush, Thomas S. House | 71 Hopkinton Rd | Upton | 1842 | |
| UPT.324 | Forbush, John House | 74 Hopkinton Rd | Upton | 1851 | |
| UPT.325 | Forbush, Dea. Samuel House | 84 Hopkinton Rd | Upton | C 1799 | |
| UPT.314 | Green, John House | 30 James Rd | Upton | C 1796 | |
| UPT.137 | | 29 Lodge St | Upton | C 1920 | |
| UPT.138 | | 30 Lodge St | Upton | C 1920 | |
| UPT.903 | Upton Civil War Monument | Main St | Upton | 1891 | NRDIS; |
| UPT.904 | Upton Recent Wars Memorial | Main St | Upton | 1984 | NRDIS; |
| UPT.901 | Upton Town Common | Main St | Upton | 1770 | NRDIS; |
| UPT.902 | Upton World War I Memorial | Main St | Upton | 1921 | NRDIS; |
| UPT.905 | Women's Christian Temperance Union Fountain | Main St | Upton | R 1880 | NRDIS; |
| UPT.1 | Upton Town Hall | 1 Main St | Upton | 1884 | NRIND; PR; NRDIS; |
| UPT.12 | Upton Methodist Episcopal Church | 4 Main St | Upton | 1876 | NRDIS; |
| UPT.15 | Nelson, Ezra House | 5 Main St | Upton | 1829 | NRDIS; |
| UPT.16 | Mason, James O. House | 6 Main St | Upton | 1854 | NRDIS; |
| UPT.18 | Nelson, Jonathan Jr. House, and Shop | 8 Main St | Upton | 1842 | NRDIS; |
| UPT.17 | U. S. Post Office - Upton Center Branch | 9 Main St | Upton | 1913 | NRDIS; |
| UPT.20 | Fisk, Eran A. General Store | 10 Main St | Upton | 1850 | NRDIS; |
| UPT.19 | Nelson, Elijah House | 11 Main St | Upton | 1830 | NRDIS; |
| UPT.21 | Nelson, Elijah II House | 12 Main St | Upton | 1838 | NRDIS; |
| UPT.22 | | 14 Main St | Upton | 1946 | NRDIS; |
| UPT.23 | Pierce, George Robert House | 15 Main St | Upton | 1894 | NRDIS; |
| UPT.24 | Walker, Obil House | 16 Main St | Upton | 1827 | NRDIS; |
| UPT.347 | | 18 Main St | Upton | 2003 | NRDIS; |
| UPT.25 | Struthers, William M. House | 20 Main St | Upton | 1893 | NRDIS; |
| UPT.26 | Bailey, Samuel House | 21 Main St | Upton | 1947 | NRDIS; |
| UPT.27 | Batchelor, Charles H. House | 22 Main St | Upton | 1850 | NRDIS; |
| UPT.348 | Batchelor, Charles H. New England Barn | 22 Main St | Upton | R 1880 | NRDIS; |
| UPT.28 | Walker, Edward J. House | 24 Main St | Upton | 1893 | NRDIS; |
| UPT.30 | Stoddard, Col. Elijah House | 25 Main St | Upton | 1858 | NRDIS; |
| UPT.29 | Norcross, Adams House | 26 Main St | Upton | 1836 | NRDIS; |
| UPT.31 | Fisk, Harvey W. House | 27 Main St | Upton | 1866 | NRDIS; |
| UPT.349 | | 29 Main St | Upton | R 1935 | NRDIS; |
| UPT.32 | Pease, Aaron House | 29 Main St | Upton | 1802 | NRDIS; |
| UPT.350 | | 31 Main St | Upton | R 1920 | NRDIS; |
| UPT.33 | Bowker, A. Abiather House | 31 Main St | Upton | 1898 | NRDIS; |
| UPT.351 | | 32 Main St | Upton | R 1920 | NRDIS; |
| UPT.34 | Hale, Dea. William House | 32 Main St | Upton | C 1831 | NRDIS; |
| UPT.35 | Bowker, A. Abiather Store | 33 Main St | Upton | 1938 | NRDIS; |
| UPT.36 | Eames, Russell House | 37 Main St | Upton | 1847 | NRDIS; |
| UPT.37 | Poirier, George House | 39 Main St | Upton | 1955 | NRDIS; |
| UPT.38 | Eames, Charles A. House | 41 Main St | Upton | 1849 | NRDIS; |
| UPT.39 | Pierce, Isaac E. H. House | 43 Main St | Upton | 1890 | NRDIS; |
| UPT.40 | Forbush, Newell House | 45 Main St | Upton | 1841 | NRDIS; |
| UPT.330 | Williams Funeral Home | 45 Main St | Upton | 1985 | NRDIS; |

Community Preservation Plan

| | | | | | |
|---------|--|---------------|-------|--------|--------|
| UPT.41 | Messinger, David House | 46 Main St | Upton | 1850 | NRDIS; |
| UPT.42 | Goldthwaite, Adin House | 48 Main St | Upton | 1863 | NRDIS; |
| UPT.43 | Keniston, Donald R. House | 51 Main St | Upton | 1970 | NRDIS; |
| UPT.44 | Benson, George H. - Fay, John Bemis House | 52 Main St | Upton | 1877 | NRDIS; |
| UPT.354 | | 53 Main St | Upton | R 1920 | NRDIS; |
| UPT.45 | Welch, John C. House | 53 Main St | Upton | 1841 | NRDIS; |
| UPT.46 | Wilcock House | 54 Main St | Upton | 1981 | NRDIS; |
| UPT.47 | Stearns, Leander House | 55 Main St | Upton | 1875 | NRDIS; |
| UPT.48 | Miller, Levi Bixby House | 57 Main St | Upton | 1842 | NRDIS; |
| UPT.49 | | 59 Main St | Upton | 1972 | NRDIS; |
| UPT.50 | | 60 Main St | Upton | 1980 | NRDIS; |
| UPT.51 | Fisk, Wilbur G. Hardware Store | 62 Main St | Upton | 1907 | NRDIS; |
| UPT.52 | Alexander, Joseph W. House | 63 Main St | Upton | 1843 | NRDIS; |
| UPT.53 | Rollins, John - Fisk, Dennis T. House | 64 Main St | Upton | 1886 | NRDIS; |
| UPT.54 | Follett, Curtis M. House | 65 Main St | Upton | 1875 | |
| UPT.55 | Upton Elementary School | 67-71 Main St | Upton | 1951 | |
| UPT.56 | Smith, George H. House | 70 Main St | Upton | 1896 | |
| UPT.57 | | 72 Main St | Upton | 1981 | |
| UPT.58 | Eames, Stephen Hall House | 73 Main St | Upton | 1882 | |
| UPT.59 | Brown, Caleb House | 74 Main St | Upton | 1869 | |
| UPT.60 | Murphy, Michael Double House | 76 Main St | Upton | 1886 | |
| UPT.61 | Temple, J. Albert House | 77 Main St | Upton | 1897 | |
| UPT.62 | Murphy, Michael House | 78 Main St | Upton | 1897 | |
| UPT.63 | Smith, George House | 79 Main St | Upton | 1881 | |
| UPT.64 | | 81 Main St | Upton | 1960 | |
| UPT.65 | Connelly, James F. House | 86 Main St | Upton | 1884 | |
| UPT.66 | Fitzgerald, Michael House | 88A Main St | Upton | 1855 | |
| UPT.67 | Fitzgerald, Michael House | 88B Main St | Upton | 1865 | |
| UPT.68 | O'Leary, Jeremiah J. House | 89 Main St | Upton | 1890 | |
| UPT.69 | Reynold, William Garage | 90 Main St | Upton | 1926 | |
| UPT.70 | Briggs, George Convenience Store and Gas Station | 91 Main St | Upton | 1921 | |
| UPT.71 | Willard, Edgar A. House | 93 Main St | Upton | 1898 | |
| UPT.72 | Hunter, Fleming House | 95 Main St | Upton | 1890 | |
| UPT.73 | Howe, Elinor A. House | 97 Main St | Upton | 1884 | |
| UPT.74 | Snow, Leander House | 98 Main St | Upton | 1885 | |
| UPT.75 | Knowlton, William Straw Hat Factory Worker Housing | 99 Main St | Upton | 1872 | |
| UPT.76 | Skinner, Edward Payson House | 100 Main St | Upton | 1892 | |
| UPT.77 | Knowlton, William Straw Hat Factory Worker Housing | 101 Main St | Upton | 1872 | |
| UPT.78 | Knowlton, William Straw Hat Factory Worker Housing | 103 Main St | Upton | 1872 | |
| UPT.79 | Skinner, Charles Plympton House | 104 Main St | Upton | 1889 | |
| UPT.80 | Mulliken, Helen Home School | 105 Main St | Upton | 1877 | |
| UPT.81 | Webster, Melvin House | 107 Main St | Upton | 1855 | |
| UPT.82 | Fay, Hiram Erastus House | 108 Main St | Upton | 1884 | |
| UPT.83 | Aldrich, Otis D. House | 109 Main St | Upton | 1879 | |
| UPT.84 | Knowlton, William Straw Hat Factory Worker Duplex | 110 Main St | Upton | 1898 | |
| UPT.85 | Stearns, Sallie Warren House | 111 Main St | Upton | 1879 | |
| UPT.86 | Warren, Eli House | 112 Main St | Upton | 1826 | |
| UPT.87 | Upton Plaza Mini-Mall | 113 Main St | Upton | 1979 | |
| UPT.88 | Briggs, George Gas Station and Store | 114 Main St | Upton | 1929 | |
| UPT.89 | Texaco Gas Station | 115 Main St | Upton | 1965 | |
| UPT.90 | U. S. Post Office - West Upton Branch | 116 Main St | Upton | 1952 | |
| UPT.91 | Wood Drugstore | 118 Main St | Upton | 1953 | |
| UPT.92 | West Upton Unitarian Church | 120 Main St | Upton | 1874 | |
| UPT.93 | Sunoco Gas Station | 121 Main St | Upton | 1963 | |
| UPT.94 | Batchelor, Eli W. House | 122 Main St | Upton | 1889 | |
| UPT.95 | Warren, Eli Store | 124 Main St | Upton | 1828 | |
| UPT.99 | Mazza, Angelo Barber Shop and House | 125 Main St | Upton | 1942 | |
| UPT.100 | Batchelor, Amos Boot Shop | 127 Main St | Upton | 1855 | |
| UPT.101 | Knowlton, William House | 128 Main St | Upton | 1866 | |
| UPT.102 | Legg, Capt. William House | 130 Main St | Upton | 1832 | |
| UPT.103 | Legg, William House | 131 Main St | Upton | 1842 | |
| UPT.104 | Knowlton, William Straw Hat Factory Worker Housing | 132 Main St | Upton | 1861 | |
| UPT.105 | Cobbett, Henry Augustus House | 133 Main St | Upton | 1872 | |
| UPT.337 | Knowlton Hat Factory - Building A | 134 Main St | Upton | 1872 | NRIND; |
| UPT.106 | Knowlton Hat Factory - Building B | 134 Main St | Upton | 1872 | NRIND; |
| UPT.338 | Knowlton Hat Factory - Building C | 134 Main St | Upton | 1872 | NRIND; |
| UPT.340 | Knowlton Hat Factory - Building D | 134 Main St | Upton | 1908 | NRIND; |
| UPT.339 | Knowlton Hat Factory - Building E | 134 Main St | Upton | 1908 | NRIND; |

Community Preservation Plan

| | | | | | |
|---------|--|-----------------|-------|--------|--------|
| UPT.341 | Upton Community Center | 134 Main St | Upton | 1908 | NRIND; |
| UPT.107 | Knowlton, William Straw Hat Factory Boarding House | 135 Main St | Upton | 1911 | |
| UPT.108 | Clapp, Judson B. House | 137 Main St | Upton | 1827 | |
| UPT.109 | Knowlton, William Straw Hat Factory Worker Housing | 138A-B Main St | Upton | 1849 | |
| UPT.110 | Clapp, Luther Judson House | 139 Main St | Upton | 1849 | |
| UPT.111 | Allen, Timothy B. House | 140 Main St | Upton | 1839 | |
| UPT.112 | Comstock, Metcalf House | 142 Main St | Upton | 1864 | |
| UPT.113 | Knowlton, Daniel W. House | 143 Main St | Upton | 1874 | |
| UPT.114 | Knowlton, William Straw Hat Company Worker Housing | 144 Main St | Upton | 1907 | |
| UPT.115 | Knowlton, George William House | 145 Main St | Upton | 1866 | |
| UPT.116 | Johnson, Rodolphus A. House | 146 Main St | Upton | 1849 | |
| UPT.117 | Webster, Melvin House | 148 Main St | Upton | 1840 | |
| UPT.118 | Knowlton, George W. Stable and Carriage House | 149 Main St | Upton | 1889 | |
| UPT.119 | Emerson, Willard G. House | 150 Main St | Upton | 1850 | |
| UPT.120 | Taft, Stephen House | 152 Main St | Upton | 1844 | |
| UPT.121 | Legge, Lucy House | 154 Main St | Upton | 1896 | |
| UPT.122 | Knowlton, William Straw Hat Factory Worker Housing | 156 Main St | Upton | 1904 | |
| UPT.123 | Knowlton, William Straw Hat Factory Worker Housing | 158 Main St | Upton | 1909 | |
| UPT.124 | Knowlton, William Straw Hat Factory Worker Housing | 160 Main St | Upton | 1895 | |
| UPT.125 | Temple, Annie I. and M. Estelle House | 162 Main St | Upton | 1895 | |
| UPT.126 | | 164 Main St | Upton | 1962 | |
| UPT.127 | Holbrook, Simeon House | 165 Main St | Upton | 1797 | |
| UPT.142 | Batchelor Tenement | 4 Maple Ave | Upton | R 1860 | |
| UPT.140 | | 5 Maple Ave | Upton | R 1905 | |
| UPT.143 | Batchelor Tenement | 6 Maple Ave | Upton | R 1860 | |
| UPT.141 | | 7 Maple Ave | Upton | R 1900 | |
| UPT.144 | Batchelor Tenement | 10 Maple Ave | Upton | R 1860 | |
| UPT.804 | Maplewood Cemetery | Maple St | Upton | R 1892 | |
| UPT.335 | Maplewood Cemetery Chapel | Maple St | Upton | R 1892 | |
| UPT.906 | Maplewood Cemetery Entrance Gates | Maple St | Upton | | |
| UPT.336 | Maplewood Cemetery Service Building | Maple St | Upton | | |
| UPT.907 | Maplewood Cemetery Wall | Maple St | Upton | R 1865 | |
| UPT.187 | Buck House | 1 Maple St | Upton | R 1860 | |
| UPT.139 | | 3 Maple St | Upton | R 1885 | |
| UPT.188 | | 8 Maple St | Upton | C 1853 | |
| UPT.189 | Fay House | 11 Maple St | Upton | R 1860 | |
| UPT.131 | Warren Tavern | 12 Maple St | Upton | C 1779 | |
| UPT.226 | Hayward, Jonathan House | 59 Mechanic St | Upton | 1788 | |
| UPT.225 | Sadler, Samuel House | 72 Mechanic St | Upton | 1850 | |
| UPT.224 | Baker, Ward House | 80 Mechanic St | Upton | C 1798 | |
| UPT.223 | Eames, Moses House | 93 Mechanic St | Upton | 1810 | |
| UPT.222 | Batchelor, Levi House | 120 Mechanic St | Upton | 1848 | |
| UPT.221 | Baker, Sherebiah House | 121 Mechanic St | Upton | 1770 | |
| UPT.220 | Warren, Jonathan House | 166 Mechanic St | Upton | 1789 | |
| UPT.237 | Pierce House | 12 Mendon St | Upton | R 1850 | |
| UPT.238 | | 46 Mendon St | Upton | C 1900 | |
| UPT.239 | Sadler, Ebenezer House | 78 Mendon St | Upton | 1753 | |
| UPT.240 | Sadler, John House and Inn | 94 Mendon St | Upton | 1723 | |
| UPT.241 | Warren, Eli House | 106 Mendon St | Upton | C 1833 | |
| UPT.243 | Johnson, Loring House | 149 Mendon St | Upton | 1838 | |
| UPT.244 | Wood, David Chapin House | 163 Mendon St | Upton | 1849 | |
| UPT.332 | Nelson - Miskel, Thomas Barn | 228 Mendon St | Upton | C 1880 | |
| UPT.245 | Nelson - Miskel, Thomas House | 228 Mendon St | Upton | C 1880 | |
| UPT.331 | Nelson Cobblers Shop | 228 Mendon St | Upton | R 1860 | |
| UPT.247 | Wood, Seth House | 236 Mendon St | Upton | R 1795 | |
| UPT.900 | Upton Grand Army of the Republic Hall Marker | Milford St | Upton | 1976 | NRDIS; |
| UPT.10 | Arcade Block | 1 Milford St | Upton | 1836 | NRDIS; |
| UPT.9 | Upton First Unitarian Church | 1 Milford St | Upton | 1848 | NRDIS; |
| UPT.917 | Upton First Unitarian Church Decorative Iron Fence | 1 Milford St | Upton | R 1880 | NRDIS; |
| UPT.8 | LeSure, James S. Pharmacy | 6 Milford St | Upton | 1874 | NRDIS; |
| UPT.357 | Ward, Jonathan E. House | 10 Milford St | Upton | C 1769 | NRDIS; |
| UPT.359 | | 12 Milford St | Upton | R 1880 | NRDIS; |
| UPT.262 | Ward, Nahum - Thurston, Sarah House | 12 Milford St | Upton | C 1812 | NRDIS; |
| UPT.263 | Gore, Herrick House | 31 Milford St | Upton | 1844 | |
| UPT.264 | Lee, Henrietta House | 33 Milford St | Upton | 1844 | |
| UPT.269 | Alexander, William House | 225 Milford St | Upton | 1775 | |
| UPT.206 | Nelson, James W. House | 1 Nelson St | Upton | R 1885 | NRDIS; |
| UPT.918 | Nelson, James W. House Decorative Iron Fence | 1 Nelson St | Upton | R 1880 | NRDIS; |

Community Preservation Plan

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|---------|--|-------------------|-------|--------|--------|
| UPT.205 | Fiske, S. B. House | 2 Nelson St | Upton | R 1885 | NRDIS; |
| UPT.180 | Ball, Rev. George S. House | 3 Nelson St | Upton | 1851 | NRDIS; |
| UPT.204 | Morse, G. N. House | 4 Nelson St | Upton | R 1885 | NRDIS; |
| UPT.203 | Aldrich House | 7 Nelson St | Upton | R 1885 | NRDIS; |
| UPT.202 | Johnson, R. House | 9 Nelson St | Upton | R 1860 | NRDIS; |
| UPT.179 | Warren, William Reid House | 10 Nelson St | Upton | 1852 | NRDIS; |
| UPT.366 | | 12 Nelson St | Upton | R 1920 | NRDIS; |
| UPT.367 | | 14 Nelson St | Upton | 1990 | NRDIS; |
| UPT.368 | | 15 Nelson St | Upton | 1991 | NRDIS; |
| UPT.369 | | 16 Nelson St | Upton | 1987 | NRDIS; |
| UPT.370 | Barton Barn | 17 Nelson St | Upton | R 1880 | NRDIS; |
| UPT.201 | Barton House | 17 Nelson St | Upton | R 1885 | NRDIS; |
| UPT.371 | Barton Shop | 17 Nelson St | Upton | R 1880 | NRDIS; |
| UPT.178 | Bradish, Harvey House | 18 Nelson St | Upton | C 1826 | NRDIS; |
| UPT.2 | Moroney Store and Garage | 1 North Main St | Upton | 1915 | NRDIS; |
| UPT.6 | Boston Branch Grocery Store | 8 North Main St | Upton | 1892 | NRDIS; |
| UPT.921 | Knowlton, George W. Memorial | 8 North Main St | Upton | 1921 | NRDIS; |
| UPT.7 | Wood, George W. Blacksmith Shop | 9 North Main St | Upton | 1884 | NRDIS; |
| UPT.164 | Bradish, Polly Dean House | 10 North Main St | Upton | 1844 | NRDIS; |
| UPT.373 | | 12 North Main St | Upton | 1984 | NRDIS; |
| UPT.374 | | 13 North Main St | Upton | 1955 | NRDIS; |
| UPT.165 | Wood, Jonathan - Fish, Elisha House | 14 North Main St | Upton | C 1740 | NRDIS; |
| UPT.166 | McFarland, Thomas House | 17 North Main St | Upton | C 1817 | NRDIS; |
| UPT.167 | Lesure, John Harvey House | 18 North Main St | Upton | 1840 | NRDIS; |
| UPT.184 | Lincoln House | 19 North Main St | Upton | R 1885 | |
| UPT.168 | Childs, Fisher Hill House | 20 North Main St | Upton | C 1828 | NRDIS; |
| UPT.169 | Childs, John House | 22 North Main St | Upton | 1830 | NRDIS; |
| UPT.920 | Stoddard Wall Segment | 22 North Main St | Upton | R 1850 | NRDIS; |
| UPT.170 | Childs, John House | 23 North Main St | Upton | 1826 | NRDIS; |
| UPT.182 | Flagg House | 27 North Main St | Upton | R 1885 | |
| UPT.183 | | 28 North Main St | Upton | R 1915 | |
| UPT.186 | | 35 North Main St | Upton | R 1915 | |
| UPT.171 | Fisk, Dea. Daniel Jr. House | 36 North Main St | Upton | C 1819 | |
| UPT.803 | Lakeview Cemetery | 45 North Main St | Upton | R 1849 | |
| UPT.334 | Lakeview Cemetery Shed | 45 North Main St | Upton | | |
| UPT.802 | Pine Grove Cemetery | 45 North Main St | Upton | 1756 | |
| UPT.219 | Toney, Caesar House | 15 North St | Upton | C 1750 | |
| UPT.218 | Whitney, Oliver House | 133 North St | Upton | C 1749 | |
| UPT.217 | Whitney, Ephraim House | 142 North St | Upton | C 1749 | |
| UPT.216 | Whitney, Ephraim Jr. House | 163 North St | Upton | C 1780 | |
| UPT.215 | Emery, Joseph W. House | 175 North St | Upton | 1842 | |
| UPT.230 | Sadler, Samuel House | 21 Old Grafton Rd | Upton | 1833 | |
| UPT.911 | Upton State Forest - Whistling Cave Overlook | Park Rd | Upton | 1937 | NRDIS; |
| UPT.145 | Alexander, Silas L. House | 2 Plain St | Upton | 1846 | NRDIS; |
| UPT.146 | Hall, William B. House | 4 Plain St | Upton | 1846 | NRDIS; |
| UPT.154 | Wood House | 6 Plain St | Upton | C 1851 | NRDIS; |
| UPT.155 | Hayward House | 8 Plain St | Upton | R 1885 | NRDIS; |
| UPT.156 | Rogers House | 11 Plain St | Upton | C 1851 | |
| UPT.157 | | 1 Pleasant St | Upton | C 1875 | NRDIS; |
| UPT.922 | Phipps Square Marker | 1 Pleasant St | Upton | 1947 | NRDIS; |
| UPT.147 | Pease, Josiah III House | 2 Pleasant St | Upton | 1814 | NRDIS; |
| UPT.148 | Wood, Otis House | 3 Pleasant St | Upton | 1832 | NRDIS; |
| UPT.149 | Messinger, David - Davis, Daniel House | 5 Pleasant St | Upton | 1832 | NRDIS; |
| UPT.385 | | 6 Pleasant St | Upton | R 1880 | NRDIS; |
| UPT.386 | | 6 Pleasant St | Upton | 1950 | NRDIS; |
| UPT.150 | Hall, William B. House | 6 Pleasant St | Upton | 1835 | NRDIS; |
| UPT.158 | | 7 Pleasant St | Upton | R 1850 | NRDIS; |
| UPT.387 | | 10 Pleasant St | Upton | R 1950 | NRDIS; |
| UPT.151 | Alexander, Calvin Wheelock House | 10 Pleasant St | Upton | 1834 | NRDIS; |
| UPT.919 | Alexander, Calvin Wheelock House Iron Fence | 10 Pleasant St | Upton | R 1880 | NRDIS; |
| UPT.388 | | 11 Pleasant St | Upton | 1953 | NRDIS; |
| UPT.152 | Messinger, David Anson House | 12 Pleasant St | Upton | 1846 | NRDIS; |
| UPT.159 | | 14 Pleasant St | Upton | R 1860 | NRDIS; |
| UPT.389 | | 15 Pleasant St | Upton | 1970 | NRDIS; |
| UPT.160 | | 16 Pleasant St | Upton | R 1860 | NRDIS; |
| UPT.390 | | 17 Pleasant St | Upton | 1953 | NRDIS; |
| UPT.161 | | 18 Pleasant St | Upton | R 1860 | NRDIS; |
| UPT.162 | | 20 Pleasant St | Upton | R 1860 | NRDIS; |

Community Preservation Plan

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|---------|--|--------------------|-------|--------|------------|
| UPT.163 | Hudson, H. N. House | 21 Pleasant St | Upton | C 1870 | NRDIS; |
| UPT.153 | Messinger, David Anson House | 23 Pleasant St | Upton | 1849 | NRDIS; |
| UPT.234 | Messinger, David A. House | 28 Pleasant St | Upton | 1850 | |
| UPT.235 | Messinger, David A. House | 30 Pleasant St | Upton | 1851 | |
| UPT.236 | Messinger, David A. House | 34 Pleasant St | Upton | 1852 | |
| UPT.265 | Holbrook, B. F. House | 12 Prospect St | Upton | R 1860 | |
| UPT.266 | Gore, Ebenezer Jr. House | 80 Prospect St | Upton | 1833 | |
| UPT.214 | Leland, Aaron House | 54 Ridge Rd | Upton | 1848 | |
| UPT.185 | Forbush House | 1 River St | Upton | R 1860 | |
| UPT.132 | | 1-1A Russell St | Upton | R 1900 | |
| UPT.134 | | 2 Russell St | Upton | R 1905 | |
| UPT.133 | | 5 Russell St | Upton | C 1950 | |
| UPT.392 | | 3 School St | Upton | 1952 | NRDIS; |
| UPT.393 | | 3 School St | Upton | R 1965 | NRDIS; |
| UPT.200 | | 4 School St | Upton | R 1915 | NRDIS; |
| UPT.199 | | 5 School St | Upton | R 1915 | NRDIS; |
| UPT.395 | | 6 School St | Upton | R 1900 | NRDIS; |
| UPT.198 | Brown House | 9 School St | Upton | R 1860 | NRDIS; |
| UPT.177 | Leland, Charles House | 10 School St | Upton | 1850 | NRDIS; |
| UPT.197 | Walker House | 11 School St | Upton | R 1890 | NRDIS; |
| UPT.196 | Ball House | 12 School St | Upton | R 1890 | NRDIS; |
| UPT.399 | | 14 School St | Upton | 1984 | NRDIS; |
| UPT.401 | | 16 School St | Upton | 1984 | NRDIS; |
| UPT.403 | | 20 School St | Upton | R 2000 | NRDIS; |
| UPT.176 | Upton Center - Upton District #1 Schoolhouse | 26 School St | Upton | 1851 | NRDIS; PR; |
| UPT.404 | | 27 School St | Upton | 1975 | NRDIS; |
| UPT.405 | | 29 School St | Upton | 1953 | NRDIS; |
| UPT.406 | | 29 School St | Upton | R 1975 | NRDIS; |
| UPT.175 | Ball, George S. School | 30 School St | Upton | 1923 | NRDIS; |
| UPT.923 | Benoit, Joseph Monument | 30 School St | Upton | R 1980 | NRDIS; |
| UPT.192 | Taft Duplex | 51 School St | Upton | R 1880 | |
| UPT.191 | Ruggles House | 55 School St | Upton | R 1880 | |
| UPT.190 | Leland House | 56 School St | Upton | R 1860 | |
| UPT.172 | Osborn, Lewis House | 58 School St | Upton | 1851 | |
| UPT.313 | Taft, Levi Whitney House | 76 School St | Upton | 1845 | |
| UPT.248 | Upton Town Farm | 52 South St | Upton | 1896 | |
| UPT.249 | Wood, Simeon House | 104 South St | Upton | 1832 | |
| UPT.250 | Taft, Hiram House | 116 South St | Upton | C 1820 | |
| UPT.251 | Taft, Elisha Jr. House | 148 South St | Upton | C 1805 | |
| UPT.333 | | 180 South St | Upton | C 1920 | |
| UPT.252 | Viall, Stephen Double House | 180 South St | Upton | 1858 | |
| UPT.309 | Ruggles, Isaac Merrill House | 13 Stoddard St | Upton | 1850 | |
| UPT.307 | Rockwood, Lewis House | 17 Taft St | Upton | 1838 | |
| UPT.306 | Wood, Ebenezer House | 23 Taft St | Upton | R 1855 | |
| UPT.305 | Lesure, Samuel House | 29 Taft St | Upton | R 1855 | |
| UPT.304 | Fields, Jennie House | 30 Taft St | Upton | R 1895 | |
| UPT.303 | Fisk, Elisha Jr. House | 38 Taft St | Upton | 1846 | |
| UPT.302 | Fisk, Adams House | 46 Taft St | Upton | R 1860 | |
| UPT.301 | Fisk, Lt. William House | 49 Taft St | Upton | C 1757 | |
| UPT.300 | Taft, Ephraim House | 84 Taft St | Upton | C 1803 | |
| UPT.299 | Taft House | 90 Taft St | Upton | R 1825 | |
| UPT.298 | Taft, Matthew Jr. House | 104 Taft St | Upton | C 1759 | |
| UPT.292 | Bowker, M. J. House | 7 Walnut St | Upton | R 1880 | |
| UPT.916 | Upton Center Stone Lined Trench | Warren St | Upton | R 1850 | NRDIS; |
| UPT.181 | Wood, Palmer House | 7 Warren St | Upton | C 1830 | NRDIS; |
| UPT.195 | Nelson Barn | 10 Warren St | Upton | R 1894 | NRDIS; |
| UPT.229 | Knowlton, William Straw Hat Factory Worker Housing | 137 Warren St | Upton | R 1865 | |
| UPT.232 | Rogers, George G. House | 5 West Main St | Upton | 1845 | |
| UPT.253 | Aldrich, Isaac House | 169 West River St | Upton | 1745 | |
| UPT.315 | Walker, Albert House | 2 Westborough Rd | Upton | 1847 | |
| UPT.316 | Whitney, D. House | 23 Westborough Rd | Upton | R 1855 | |
| UPT.317 | | 27 Westborough Rd | Upton | C 1890 | |
| UPT.318 | | 39 Westborough Rd | Upton | R 1880 | |
| UPT.319 | Lackey, Perley House | 68 Westborough Rd | Upton | C 1842 | |
| UPT.801 | Bradish - Old North Cemetery | 128 Westborough Rd | Upton | 1776 | |
| UPT.211 | Civilian Conservation Corps Camp Infirmary | 205 Westborough Rd | Upton | 1935 | NRDIS; |
| UPT.213 | Civilian Conservation Corps Camp North Barn | 205 Westborough Rd | Upton | 1935 | NRDIS; |
| UPT.212 | Civilian Conservation Corps Camp South Barn | 205 Westborough Rd | Upton | 1935 | NRDIS; |

Community Preservation Plan

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|---------|--|--------------------|-------|--------|--------|
| UPT.210 | Civilian Conservation Corps Main Camp Building | 205 Westborough Rd | Upton | 1935 | NRDIS; |
| UPT.925 | Upton State Forest - CCC Camp Circulation System | 205 Westborough Rd | Upton | 1935 | NRDIS; |
| UPT.924 | Upton State Forest - CCC Parade Ground | 205 Westborough Rd | Upton | 1935 | NRDIS; |
| UPT.928 | Upton State Forest - CCC Waterhole #1 | 205 Westborough Rd | Upton | C 1935 | NRDIS; |
| UPT.913 | Upton State Forest - Dean Pond | 205 Westborough Rd | Upton | 1938 | NRDIS; |
| UPT.914 | Upton State Forest - Dean Pond Dam | 205 Westborough Rd | Upton | 1938 | NRDIS; |
| UPT.927 | Upton State Forest - Loading Dock | 205 Westborough Rd | Upton | R 1965 | NRDIS; |
| UPT.909 | Upton State Forest - Loop Road | 205 Westborough Rd | Upton | C 1935 | NRDIS; |
| UPT.929 | Upton State Forest - Old Knob Fire Pits | 205 Westborough Rd | Upton | 1937 | NRDIS; |
| UPT.930 | Upton State Forest - Old Knob Small Waterholes | 205 Westborough Rd | Upton | 1937 | NRDIS; |
| UPT.910 | Upton State Forest - Old Knob Stone Steps | 205 Westborough Rd | Upton | 1937 | NRDIS; |
| UPT.908 | Upton State Forest - Park Road | 205 Westborough Rd | Upton | C 1935 | NRDIS; |
| UPT.932 | Upton State Forest - Waterhole #2 | 205 Westborough Rd | Upton | 1936 | NRDIS; |
| UPT.933 | Upton State Forest - Waterhole #3 | 205 Westborough Rd | Upton | 1936 | NRDIS; |
| UPT.934 | Upton State Forest - Waterhole #3 Bridge | 205 Westborough Rd | Upton | 1936 | NRDIS; |
| UPT.931 | Upton State Forest - Whistling Cave Trail | 205 Westborough Rd | Upton | 1937 | NRDIS; |
| UPT.926 | Upton State Forest Flagpole | 205 Westborough Rd | Upton | 2008 | NRDIS; |
| UPT.407 | Upton State Forest Shed | 205 Westborough Rd | Upton | R 1965 | NRDIS; |
| UPT.231 | Newton, Daniel E. House | 13 Williams St | Upton | 1842 | |
| UPT.268 | Wood, Capt. Orra House | 9 Wood St | Upton | C 1828 | |

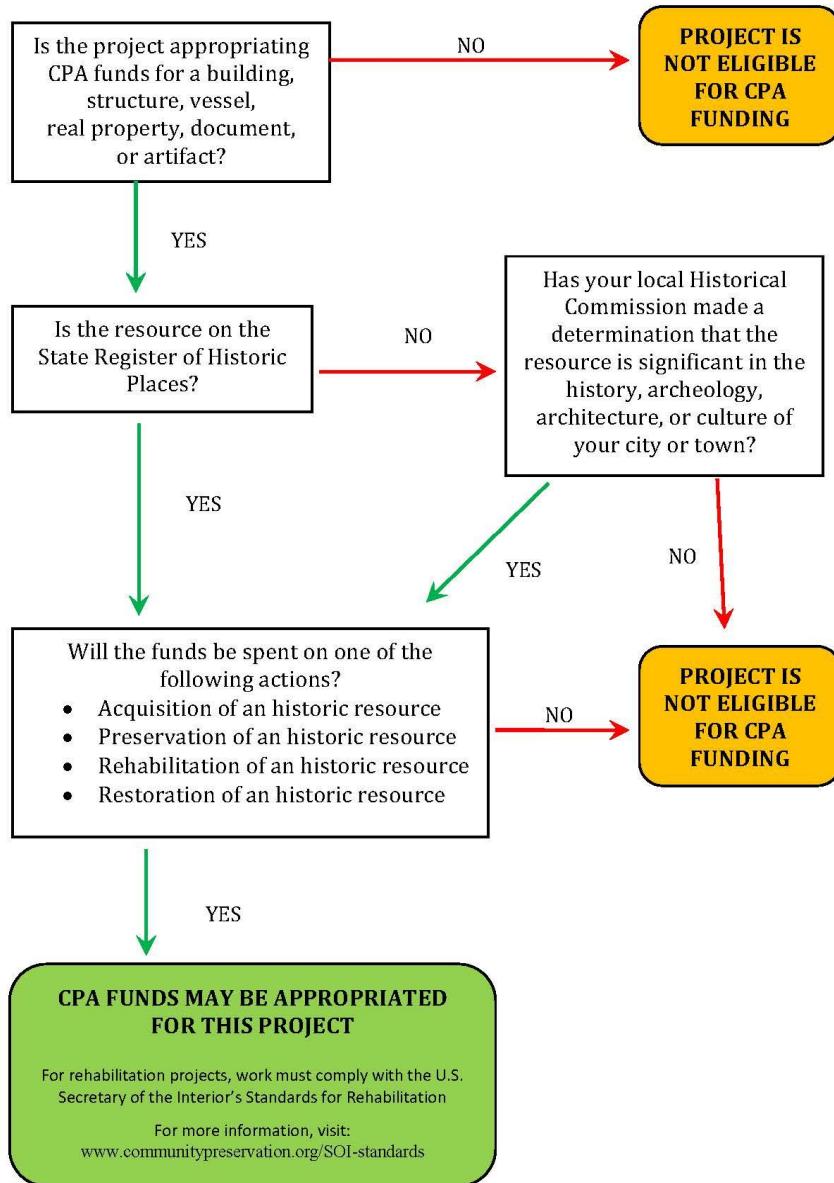
Source: MassGIS <https://mhc-macris.net/>

Appendix J



6 Beacon Street, Suite 615
Boston, MA 02108
617-367-8998

Qualifying Historic Projects for CPA Funding



Appendix K
Upton CPC Procedures and Policies

| Topic | Procedure or Policy |
|--|---|
| Administrative | |
| Reorganization | Appoint officers (chair and vice-chair) yearly as soon as possible after yearly Select Board appointments (typically in July). |
| CPC Membership | See CPA Bylaw for member requirements. |
| CPC Membership | Actively recruit members to fill vacancies. |
| CP-3 Project Report | Staff and chair to submit data to MA DOR yearly by September 15 deadline. https://www.communitypreservation.org/sites/g/files/vyhlif4646/f/uploads/cp3_manual_version_1.2_january_2023.pdf https://maps.massgis.digital.mass.gov/MassGIS_CPC |
| Expense Vouchers | Staff or chair prepare vouchers. The chair is authorized to sign vouchers of less than \$1000 without prior CPC approval. |
| CPA Plan | Revise plan and hold public hearing yearly in March. |
| Annual Report | Chair to draft for CPC review and approval in December. |
| Project Closeout | CPC vote required to close out projects. Town Account will close-out projects after receiving copy of meeting minutes documenting CPC authorization to close out a project. |
| Records Management | Maintain electronic copies of applications, minutes, meeting materials, and other documents on the “t” drive. |
| Meetings and Public Hearings | |
| Public Hearings | CPC policy is to hold an advertised public hearing for all formal applications for CPC funding. Projects with a budget of less than \$5,000 do not require a public hearing. |
| Public Notice | All hearings should be publicly noticed in the Worcester Telegram and Gazette by staff. Administrative funds are used to pay the cost of legal adds. |
| Meeting Format | Meetings may be remote or hybrid, as allowed by State law. Meetings which include public hearings should be hybrid. |
| Minutes | Draft minutes to be prepared by staff (Assistant Town Planner) and typically should be available for CPC review within one month after a CPC meeting. |
| Applications for CPA Funding | |
| Applications | Applications are accepted throughout the year on an ad-hoc basis. Consulting with CPC before applying is recommended. |
| Application Format and Review Criteria | See CPA Plan. |
| Other | |
| Protection of Recreation Land | Per opinion of town counsel cited in email from Town Manager Joe Laydon permanent deeded protection of recreation land is not required for CPA funded projects (e.g., the Community Center playground, MURSD project). Land under control of the Recreation Commission has Article 97 Protection. This opinion varies with Community Preservation Coalition guidance. |
| CPA Coalition | Maintain membership in the Coalition (yearly dues paid with CPC Administrative Funds authorized by town meeting). |
| Signage | CPA funding should be acknowledged in signage where appropriate for major Historical Preservation, Open Space, and Recreation projects. |
| Town Website | Include a copy of Upton CPA bylaw, current Community Preservation Plan, CPC membership and affiliation, and instructions for applicants. Also, work to include an informational webpage for many CPA funded projects. |

Appendix L

Upton CPA Bylaw (as amended)

Chapter 18

COMMUNITY PRESERVATION COMMITTEE

| | | | |
|----------------|---|----------------|---|
| § 18-1. | Establishment. | § 18-5. | Severability. |
| § 18-2. | Duties. | § 18-6. | Time for making appointments. |
| § 18-3. | Requirement for quorum and cost estimates. | § 18-7. | Records, accounting and reporting. |
| § 18-4. | Amendments. | | |

[HISTORY: Adopted by the Town Meeting of the Town of Upton May 2003 as Title 5 of the General Bylaws. Amendments noted where applicable.]

§ 18-1. Establishment. [Amended 11-7-2023STM by Art. 16; 11-12-2024STM by Art. 21]

There is hereby established in the Town of Upton a Community Preservation Committee, consisting of up to nine voting members pursuant to MGL c. 44B.

- A. The composition of the Committee, the appointment authority and the term of office for the Committee members shall be as follows:
 - (1) One member of the Conservation Commission as designated by the Commission for a term of three years.
 - (2) One member of the Historical Commission as designated by the Commission for a term of three years.
 - (3) One member of the Planning Board as designated by the Board for a term of three years.
 - (4) One member of the Recreation Commission as designated by the Commission for an initial term of one year and thereafter for a term of three years.
 - (5) One member of the Housing Authority as designated by the Authority for an initial term of two years and thereafter for a term of three years.
 - (6) One member of the Open Space Committee as designated by the Committee for an initial term of one year and thereafter for a term of three years.
 - (7) One member of the Affordable Housing Trust as designated by the Trust for a term of three years.
 - (8) Two members to be appointed by the Select Board, one member to be appointed for a term of one year and thereafter for a term of three years and one member to be appointed for a term of one year and thereafter for a term of three years.
- B. Should any of the commissions, boards, councils or committees which have appointment authority under this chapter be no longer in existence for whatever reason, the appointment authority for that commission, board, council, or committee shall become the responsibility of the Select Board.

§ 18-2. Duties.

- A. The Community Preservation Committee shall study the needs, possibilities and resources of the Town regarding community preservation. The Committee shall consult with existing municipal boards, including the Conservation Commission, the Historical Commission, the Planning Board, the Recreation Commission and the Housing Authority, or persons acting in those capacities or performing like duties, in conducting such studies. As part of its study, the Committee shall hold one or more public informational hearings on the needs, possibilities and resources of the Town regarding community preservation possibilities and resources, notice of which shall be posted publicly and published for each of two weeks preceding a hearing in a newspaper of general circulation in the Town. **[Amended 5-8-2021 ATM by Art. 17]**
- B. The Community Preservation Committee shall make recommendations to the Town Meeting for the acquisition, creation and preservation of open space, for the acquisition and preservation of historic resources, for the acquisition, creation and preservation of land for recreational use, for the creation, preservation and support of community housing and for rehabilitation or restoration of such open space, historic resources, land for recreational use and community housing that is acquired or created as provided in this section. With respect to community housing, the Community Preservation Committee shall recommend, wherever possible, the reuse of existing buildings or construction of new buildings on previously developed sites.
- C. The Community Preservation Committee may include in its recommendation to the Town Meeting a recommendation to set aside for later spending funds for specific purposes that are consistent with community preservation but for which sufficient revenues are not then available in the Community Preservation Fund to accomplish that specific purpose or to set aside for later spending funds for general purposes that are consistent with community preservation.

§ 18-3. Requirement for quorum and cost estimates.

The Community Preservation Committee shall not meet or conduct business without the presence of a quorum. A majority of the members of the Community Preservation Committee shall constitute a quorum. The Community Preservation Committee shall approve its actions by majority vote. Recommendations to the Town Meeting shall include their anticipated costs.

§ 18-4. Amendments.

This chapter may be amended from time to time by a majority vote of the Town Meeting, provided that the amendments would not cause a conflict to occur with MGL c. 44B.

§ 18-5. Severability.

In case any section, paragraph or part of this chapter be for any reason declared invalid or unconstitutional by any court of last resort, every other section, paragraph or part shall continue in full force and effect.

§ 18-6. Time for making appointments.

Each appointing authority shall have 10 days after approval by the Attorney General to make its initial appointments. Should any appointing authority fail to make its appointment within that allotted time, the Town Moderator shall make the appointment.

§ 18-7. Records, accounting and reporting. [Amended 5-8-2021 ATM by Art. 17]

The Community Preservation Committee shall keep a full and accurate account of all of its actions, including its recommendations and the action taken on them and records of all appropriations or expenditures made from the Community Preservation Fund. The Committee shall also keep records of any real property interests acquired, disposed of or improved by the Town upon its recommendation, including the names and addresses of the grantors or grantees and the nature of the consideration. The records and accounts shall be public records.