

**TOWN OF CONCORD
SELECT BOARD MEETING
DECEMBER 19, 2022 | 6:30 PM**

**TOWN HOUSE, 22 MONUMENT SQUARE
SECOND FLOOR MEETING ROOM AND VIA ZOOM**

Join Zoom Meeting

<https://us02web.zoom.us/j/87852998629?pwd=Mit1bFBkdXV3eURnZTZHSnZ6WTZDQT09>

Meeting ID: 878 5299 8629

Passcode: 513023

Toll Free: 888-475-4499

AGENDA

#	Time*	Agenda Item
1.	6:30 PM	Call to Order
		Consent Agenda <ul style="list-style-type: none"> • Meeting Minutes <ul style="list-style-type: none"> - October 17, 2022 - November 7, 2022 - November 28, 2022 • Transportation Bond Bill Support Letter • Sunday Entertainment License for 51 Walden, Incorporated for “The Marriage of Figaro” (Mozart Opera) on December 18, 2022 – Retroactive Granting of License • Proclamation Honoring Chief Joseph O’Connor’s Retirement from the Concord Police Department • Gift Acceptance from Concord-Carlisle Community Chest of 19 Main Street, Unit #2 in the amount of \$5,000.00 for Concord Recreation School Year Childcare Scholarships
2.		Town Manager’s Report
3.		Chair’s Report
4.	6:45 PM	Vote to Approve Hours of Operation for West Village Tavern
5.	6:50 PM	Common Victualler License Application for New Leaf Café at 561 Virginia Road
6.	7:00 PM	Massachusetts 250 th American Revolution Anniversary Commission Update from Mike Lawson
7.	7:15 PM	Joint Meeting with the Diversity, Equity, and Inclusion Commission
8.	8:00 PM	Housing Production Plan Approval
9.	8:05 PM	Amend the Public Ceremonies and Celebrations Committee Charge
10.	8:15 PM	Fiscal Year 2024 Budget Overview; Fiscal Year 2024 ARPA Priorities; Fiscal Year 2024-2028 CIP Overview

11.	8:45 PM	Vote to Approve Annual Local License and Liquor License Renewals
12.	8:50 PM	Vote to Submit Annual Town Meeting Warrant Articles
13.	9:00 PM	<p>Committee Nominations:</p> <p><u>Historic Districts Commission:</u> Walter Clay of 675 Sudbury Road as an Associate Member to represent the Planning Board for a term to expire January 1, 2024, Katherine Mast of 38 Blueberry Lane as a Member to represent the Concord Free Public Library for a term to expire January 1, 2028, William Huyett of 1123 Monument Street as an Associate Member to represent the Concord Free Public Library for a term to expire January 1, 2028</p> <p><u>West Concord Advisory Committee:</u> Nicole Hammond of 76 Prairie Street for a term to expire April 30, 2025</p> <p><u>Public Ceremonies and Celebrations Committee:</u> <i>Subject to the approval of the amended Public Ceremonies and Celebrations Committee Charge (Agenda Item 9) - Timothy Taylor of 14 Concord Greene, Unit 8</i></p>
14.	9:05 PM	<p>Committee Appointments:</p> <p><u>Concord Cultural Council:</u> Tom Martin of 32 Lowell Road for a retroactive corrective appointment and to be exempted from term limits set out in APP #10, Section VII(b), from June 1, 2021 through May 31, 2024 and Hillary Taylor of 336 Baker Avenue (business address) for a retroactive corrective appointment and to be exempted from the residential requirements of APP #10, Section VII(e), from June 1, 2021 through May 31, 2024</p> <p><u>Economic Vitality Committee:</u> Cato Anderson of 14 Park Lane for a second term to expire April 30, 2025, Marie Foley of 8 Lakeview Drive for a second term to expire May 31, 2024, Mark Martines of 66 Alford Circle for a second term to expire April 30, 2023, Jan Turnquist of 106 Kenney Lane for a second term to expire April 30, 2025, Jennifer Schuenemann of 63 Cedar Way for a second term to expire May 31, 2024, Steven Verrill of 415 Wheeler Road for a second term to expire April 30, 2023, Dawn Rennert of 39 Revolutionary Road for a second term to expire April 30, 2025, and Beth Williams as Town Staff Member for a second term to expire April 30, 2023</p> <p><u>White Pond Task Force:</u> John Colman of 65 Central Street for a term to expire December 2023, upon completion of their final report to the Select Board</p> <p><u>Conservation Restriction Stewardship Committee:</u> Peter Blau of 135 Partridge Lane for a term to expire April 30, 2025</p> <p><u>Public Ceremonies and Celebrations Committee:</u> Margaret (Peggy) Laneri of 65 Attawan Road to complete an unexpired term to conclude on May 31, 2025 and Nicholas Purinton of 32 Cressbrook Road to complete an unexpired term to conclude on May 31, 2027</p>
15.	9:10 PM	Select Board Liaison Reports
16.	9:20 PM	Correspondence

17.	9:25 PM	Public Comment
18.	9:30 PM	Adjournment

**Times are approximate and subject to change*

Current Board and Committee Vacancies
Agricultural Committee – Associate Member
Bruce Freeman Rail Trail Advisory Committee
Cemetery Committee
Commission on Disability
Comprehensive Sustainability and Energy Committee
Concord 2025 Executive Committee
Concord Housing Development Corporation (CHDC)
Conservation Restriction Stewardship Committee
Council on Aging
Historic Districts Commission – Associate Member
PEG Access Advisory Committee
Personnel Board
Planning Board
Pollinator Health Advisory Committee
Public Ceremonies and Celebrations Committee
Transportation Advisory Committee
Trustees of Donations
West Concord Advisory Committee
West Concord Junction Cultural District
Zoning Board of Appeals – Associate Member

**Town of Concord
Select Board
Minutes
October 17, 2022**

Pursuant to a notice duly filed with the Town Clerk, the Concord Select Board convened in a meeting in the Second Floor Meeting Room and via Zoom on October 17, 2022, at 6:30 PM.

Present were Terri Ackerman, Acting Chair; Henry Dane, Acting Clerk; Linda Escobedo; and Mary Hartman.

Call to Order

Terri Ackerman called the meeting to order at 6:30 PM.

The absence of Select Board Chair, Matthew Johnson, is acknowledged.

Upon a motion duly made and seconded, it was **UNANIMOUSLY VOTED:** to appoint Terri Ackerman as Acting Chair for the meeting.

Due to Terri Ackerman, Clerk, acting as Chair, the need to appoint an Acting Clerk is acknowledged.

Upon a motion duly made and seconded, it was **UNANIMOUSLY VOTED:** to appoint Henry Dane as Acting Clerk for the meeting.

Consent Agenda

- Meeting Minutes:
 - February 7, 2022

Ms. Ackerman suggested the following edit to the February 7, 2022 meeting minutes: to include “with the conditions specified by the Engineering Department” in the motion for Agenda Item: Public Hearing: Grant of Location Petition from Comcast of Massachusetts III, Inc. to install aerial coaxial cable from utility pole \$38 to utility pole #43 at and near 516 Monument Street.

Ms. Escobedo suggested the following edit to the February 7, 2022 meeting minutes: to include “in a meeting in the Select Board Meeting Room” in the introduction of the minutes before “via Zoom”.

Ms. Hartman added that she is going to abstain from the February 7, 2022 meeting minutes because she was not yet a member of the Select Board.

- August 15, 2022 – Executive Session Minutes for approval, but not to release
- October 3, 2022

Ms. Ackerman noted that she is going to abstain from the approval of the October 3, 2022 meeting minutes because she was not in attendance of the meeting.

Ms. Hartman suggested the following edits to the October 3, 2022 meeting minutes: to edit the wording of a question made by herself on the page 1 during Agenda Item: Concord Middle School/Call for Special Town Meeting to state “was the Committee able to find any cost savings to

**Town of Concord
Select Board
Minutes
October 17, 2022**

offset schematic design changes”.

Upon a motion duly made and seconded, it was

VOTED: to approve the meeting minutes for February 7, 2022, August 15, 2022 (Executive Session, not to be released), and October 3, 2022. **The vote passed** with Ms. Hartman abstaining from the February 7, 2022 meeting minutes and Ms. Ackerman abstaining from the October 3, 2022 meeting minutes.

- Town Accountant Warrant: October 13, 2022
- Gifts: by Mr. and Mrs. John Langan to the Council on Aging Gift Account in the amount of \$1,000.00

Upon a motion duly made and seconded, it was **UNANIMOUSLY VOTED:** to approve the consent agenda.

Town Manager’s Report

Town Manager Kerry Lafleur reviewed the Town Manager’s report included in the Select Board meeting packet. Ms. Lafleur highlighted a Community Forum held last week regarding the Hazard Mitigation Plan, the Police Department’s participation in the Walk Bike Roll Event, Fall tourism in Town, and the Public Works Roads Preservation Program.

Ms. Hartman asked a question of clarification regarding the Public Works Roads Preservation Program.

Ms. Lafleur responded that the method being used to resurface the roads is the most cost effective in efforts to extend the life of roads that are still in good condition, to prevent further deterioration.

Ms. Hartman asked if residents that are located at the affected areas are notified.

Ms. Lafleur responded that this typically is the case.

Chair’s Report

Ms. Ackerman had no information to report.

**Update on Town Counsel’s Review of Certain Provisions of
Christopher Heights/Junction Village Development Memo of
Understanding**

Town Counsel Mina Makarious appeared before the Select Board to discuss his prepared Memorandum of Understanding, which is included in the Board’s packet. Attorney Makarious highlighted that the Board maintains the decision to approve or disapprove providing additional funding to the Christopher Heights project.

Update on Christopher Heights/Junction Village Project

**Town of Concord
Select Board
Minutes
October 17, 2022**

Michael Lawson of 1695 Lowell Road and member of the Concord Municipal Affordable Housing Trust appeared before the Select Board to provide comment on the matter and noted that the Concord Municipal Affordable Housing Trust had unanimously voted to allocated \$1,000,000.00 to the Christopher Heights project. Mr. Lawson continued and urged the Select Board to write a letter of support to the Department of Housing and Community Development. Mr. Lawson's full statement is included in Appendix A.

Elise Woodward of 379 Garfield Road and former Chair of the Comprehensive Long-Range Planning Committee appeared before the Select Board to provide comment on the matter and urged the Board to send a letter of support to the developer to continue the project. Ms. Woodward noted that a top priority of the Long-Range Planning Committee was affordable housing.

Moira Walsh appeared before the Select Board and asked if the developer is no longer moving forward with the project.

Ms. Ackerman responded that this is correct, the letter from the developer is dated October 7, 2022.

Ms. Walsh responded that she urges the Select Board to send a letter of support to the developer and is strongly in favor of the project moving forward.

Alice Kaufman of 1615 Lowell Road and former Select Board member appeared before the Select Board to provide comment on the matter and noted of the environmental concerns in relation to the Christopher Heights project moving forward. Ms. Kaufman's full statement is included in Appendix A.

Stephan Bader of 7 River Street and Vice-Chair of the Concord Housing Authority appeared before the Select Board to provide comment on the matter on behalf of the Concord Housing Authority and urged the Select Board to support the Christopher Heights project and endorse the funding offered by the Concord Municipal Affordable Housing Trust. Mr. Bader's full statement is included in Appendix A.

Brad Ellsworth of 347 Lexington Road and member of the Concord Housing Foundation appeared before the Select Board to provide comment on the matter and urged the Board to send a letter of support to the developer and is strongly in favor of the project moving forward.

Peggy Briggs of 804 Concord Greene and member of the Finance Committee appeared before the Select Board to provide comment on the matter. Ms. Briggs stated that at the Finance Committee meeting on October 14, 2022, the Committee reviewed the developer's letter, dated October 7, 2022, indicating their withdrawal from the project and that the Committee agreed that no additional funding should be appropriated for this project.

Diane Proctor of 57 Sudbury Road and Chair of the Community Preservation

**Town of Concord
Select Board
Minutes
October 17, 2022**

Committee appeared before the Select Board to provide comment on the matter and noted of the importance of affordable housing in Concord. Ms. Proctor continued that the process of the development of affordable housing is extremely timely, and it may not be easy and/or possible to attract other developers for this project.

Tanya Gailus of 62 Prescott Road appeared before the Select Board to provide comments on matters specific to the potential of the development's connection to municipal sewer.

Ms. Lafleur responded that there is no access to municipal sewer as a matter of right at the development, but if the development were to move forward, and the assumption would be that on-site waste water treatment would be required, rather than the use of a septic system.

Linda Nieman of 59 Mallard Drive and Co-Coordinator of Mother's Out Front appeared before the Select Board to provide comment on the matter and urged the Select Board to provide a letter of support to the Department of Housing and Community Development. Ms. Nieman's full statement is included in Appendix A.

Pamela Dritt of 1304 Concord Greene appeared before the Select Board to provide comment on the matter and urged the Board to send a letter of support to the developer and is strongly in favor of the project moving forward.

Ms. Escobedo noted that the Select Board heard many requests tonight for the Board to express their support for the project to the developer and that many options regarding affordable housing in Town were discussed. Ms. Escobedo continued that this project has been in the works for many years already and she, amongst others, toured one of the developers' other sites in Marlborough, MA, and was impressed. Ms. Escobedo noted that she hopes the Board is able to take into consideration the comments and information brought before them this evening to make an informed decision.

Mr. Dane stated that the letter the Select Board received from the developer was very straightforward in terms of withdrawing from the project. Mr. Dane continued that he feels the developer may be facing greater challenges with their finances for the project than may appear, as the developer asked for additional funding from the Town and will need additional funding from the State and that he feels that the issues in this project should not be tied to environmental concerns in the Town.

Ms. Hartman noted that she feels distrust toward the project regarding transparency, which she cannot ignore and that while some of the funding requested is due to inflation, there is also a sewer issue that the developer is facing.

Sara Wilbur of 1807 Concord Greene appeared before the Select Board to provide comment on the matter and noted that many of the Town's seniors will not be able to wait an additional 10 years for affordable housing if this project does not move forward.

Lee Smith of 1836 Main Street, Chair of the Concord Housing Development

**Town of Concord
Select Board
Minutes
October 17, 2022**

Corporation and owner of the land in question appeared before the Select Board to provide comment on the matter and noted of the total increase in costs for the project and urged the Board to vote on the matter during the meeting.

Ms. Escobedo moves that the Select Board send a letter of support to the Department of Housing and Community Development for the Christopher Heights project; **there is no second of the motion and no vote taken.**

Update from RHSO – Affordable Housing Projections

Liz Rust of 201 Commonwealth Avenue and Director of the Regional Housing Services Office appeared before the Select Board to discuss an update on affordable housing inventory in Town. Ms. Rust continued that the Town's SHI rate is 10.43%, which is 29 units over the required 10.00% required rate but that when the 2020 Census results become available, it is likely that the Town will drop below the 10.00% SHI rate.

Ms. Ackerman asked a question of clarification regarding the Census data for housing units in Concord and the Census data for building permits in Concord, as there is a discrepancy.

Ms. Rust confirmed that there is a discrepancy, but until the 2020 Census data is published, it will be hard to determine why. Ms. Rust continued that the pipeline for new developments in the future include the Mill Run LIP and Habitat for Humanity LIP applications to be heard after this presentation, Assabet River Bluff in 3-5 years, and several additional projects being studied in 5-10 years. Ms. Rust stated that in the future, there are some properties with expiring restrictions that will be removed from the SHI if not extended or preserved.

Ms. Hartman asked how the Town can keep these properties on the SHI, if possible.

Ms. Rust responded that the property owner often has the option to go to market, so the owner would need to be compensated to make the restriction extension beneficial for them as well.

Mill Run Local Initiative Program (LIP) Application and Habitat for Humanity Local Initiative Program (LIP) Application

Liz Rust of 201 Commonwealth Avenue and Director of the Regional Housing Services Office appeared before the Select board to present two Local Initiative Program applications, one for the Mill Run condominiums on Main Street, which is a project that has been ongoing for 3 years with a private developer and the other for the Habitat for Humanity unit on Commonwealth Avenue.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to approve the income deed restriction for 16 Millrun and 18 Millrun as further described in the LIP application included in the Board's packet and to sign the LIP application to be submitted to DHCD.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to approve the income deed restriction for 365 Commonwealth

**Town of Concord
Select Board
Minutes
October 17, 2022**

Avenue as further described in the LIP application included in the Board's packet and to sign the LIP application to be submitted to DHCD.

Review and Vote on Special Town Meeting Calendar for Special Town Meeting Scheduled for January 19, 2023

Ms. Ackerman opened the discussion regarding the Special Town Meeting calendar for Special Town Meeting scheduled for January 19, 2023. The full draft calendar for Special Town Meeting is included in the Board's packet.

Ms. Escobedo asked if the date for the Finance Committee public hearing has been finalized.

Peggy Briggs of 804 Concord Greene and Chair of the Finance Committee appeared before the Select Board and stated that it is scheduled for Thursday, November 17, 2022.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to open the Special Town Meeting warrant today, October 17, 2022, and close the warrant on Friday, October 28, 2022 at 12:30 PM, and adopt the Special Town Meeting calendar for Special Town Meeting scheduled for January 19, 2023.

Review and Vote on 317 Garfield Road Project in connection with its Historic Preservation Restriction

Michael Carucci and Marisela Marrero, owners of 309,317 Garfield Road appeared before the Select Board with Project Architect Elise Stone to present their application to build a detached garage on the property of 317 Garfield Road.

Ms. Ackerman asked how far the proposed garage is from the lot line.

Ms. Stone responded that the proposed garage is on a universally owned access road, not directly on Garfield Road and not near other neighbors.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to approve the 317 Garfield Road project in connection with its Historic Preservation Restriction as included in the Board's packet.

Review and Vote on revised charge of White Pond Task Force; review possible suspension of White Pond Advisory Committee charge

Ms. Ackerman opened the discussion regarding the revised charge for the White Pond Task Force.

Ms. Hartman noted that the Board's suggested revisions from the October 3, 2022 meeting have been incorporated in the draft included in the Board's packet, but that she received two additional revisions from Director of Planning and Land Management,

**Town of Concord
Select Board
Minutes
October 17, 2022**

Ms. Marcia Rasmussen. Ms. Hartman continued that the two revisions are highlighted in yellow in the draft included in the Board's packet.

Ms. Escobedo suggested that the two revisions in discussion, bullet points number 2 and 4 under the Responsibilities of the Task Force heading, be switched in order.

Ms. Hartman concurred.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to approve the revised White Pond Task Force charge as included in the Board's packet, along with reordering bullet points number 2 and 4 under the Responsibilities of the Task Force heading.

Ms. Ackerman asked if the White Pond Advisory Committee has been consulted regarding the temporary suspension of their activities.

Ms. Hartman responded that they have, which resulted in some members joining the Friends of White Pond, others interested in joining the Task Force, and others recognizing that their terms on the Committee had already expired.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to suspend the activities of the White Pond Advisory Committee until the White Pond Task Force has made recommendations to the Select Board on its future course of action.

Parking Meters Discussion

Town Manager Kerry Lafleur opened the discussion regarding parking meters, in which there has not seemed to be a consensus by the Select Board to continue in Fiscal Year 2024. Ms. Lafleur notes of problems with the functionality and maintenance of the parking meters and challenges due to cellular service in the Town Center.

Mr. Dane asked if there are costs associated with discontinuing the program, such as the removal of the parking meters.

Ms. Ackerman asked what the general purpose of the program is.

Marcia Rasmussen, Director of Planning and Land Management, appeared before the Select Board and stated that the purpose is to manage parking in the Town Center and encourage turnover in parking.

Ms. Ackerman responded that she has heard mixed reviews from business owners and residents on the program and noted that in other towns that removed parking meters there was an increase in business, so it may be good to work with the Economic Vitality Committee on this matter.

Ms. Lafleur stated that as Town Departments are in the process of budgeting for Fiscal Year 2024, it would be good to know the Select Board's stance on this matter, so the

**Town of Concord
Select Board
Minutes
October 17, 2022**

proper departments can plan accordingly on having/not having the revenue from this program.

Mr. Dane noted of problems with enforcements of the parking meters.

Ms. Hartman noted that she can contact the Economic Vitality Committee and Concord Business Partnership to receive comments on the matter.

Ms. Rasmussen added that this period can be a time to explore other options to manage parking in the Town Center.

Committee Nominations

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to nominate Michael Benn of 747 Old Marlboro Road to the Public Ceremonies and Celebrations Committee; Alyssa Erhartic of 263 Commonwealth Ave to the Public Ceremonies and Celebrations Committee.

Committee Appointments

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to appoint Mark Hanson of 340 Holden Wood Road to Pollinator Health Advisory Committee, reappointed with a date of May 1, 2020 to April 30, 2023; Ryan Hanley of 77 Lexington Road to the Historical Commission as an associate member for a term of August 8, 2022 to May 31, 2023; Virginia “Dinny” McInyre of 26 Simon Willard Road, reappointed to the Tax Relief Committee for a term of May 1, 2022 to April 30, 2025; Betsy Levinson of 124 Nashoba Road, reappointed to the Concord Cultural Council with a term of June 1, 2021 to May 31, 2024.

Select Board Liaison Reports

Ms. Ackerman reported on:

- Transportation Advisory Committee – The trolley is going to be operating through November, Chamberlain Park footbridge needs to be replaced so looking into funding sources for this, Erin Stevens, newly hired Transportation Planner, has put out a generalized RFP to improve transportation in Town
- Hazard Mitigation Forum – Attended regarding the development of the Hazard Mitigation Plan required to be held by the Town to receive FEMA funding
- Personnel Board – Continued to hear testimony regarding the Employee Appeal process
- MMA Fiscal Policy Committee – Plans to create a state agency, similar to the MSBA, for municipal buildings

Ms. Escobedo reported on:

- Concord Housing Authority – Signed contract with Habitat for Humanity, received and discussed the letter from the Grantham Corporation regarding the Christopher Heights project, discussed alternative funding sources for the Assabet River Bluff project
- Personnel Board – Attended to hear discussion on the Employee Appeal process
- Finance Committee -- Attended to hear update on the Middle School Building project and

**Town of Concord
Select Board
Minutes
October 17, 2022**

Christopher Heights project

- 250th Executive Committee – Attended the kick-off event held on Sunday, October 16th and felt it was a great session

Mr. Dane reported on:

- 250th Executive Committee – Held the kick-off event on Sunday, October 16th at the Concord Museum and feels enthusiastic about the many volunteers involved in planning the Concord 2025 Event

Ms. Hartman reported on:

- Concord Business Partnership – Attended the annual meeting and discussed transportation for the Concord 2025 Event

Public Comment

Stephan Bader of 7 River Street and Vice-Chair of the Concord Housing Authority appeared before the Select Board to provide a letter on behalf of the Concord-Carlisle League of Women's Voters.

Pamela Dritt of 1304 Concord Greene appeared before the Select Board to provide comment on the inclusion of a link to the meeting packet on the agenda that is posted on the website.

Tanya Gailus of 62 Prescott Road appeared before the Select Board and noted that Select Board meeting agendas and packets are often not available until the Thursday before the next Select Board meeting, which makes it hard to provide comments on the matter in advance if it has not been published yet.

Correspondence

Senior Administrative Assistant Shannon McAndrew noted that all correspondence received on the Friday before the next Select Board meeting at 12:00 PM will be included in the following Select Board meeting packet.

Adjourn

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to adjourn.

Meeting Materials: <https://concordma.gov/DocumentCenter/View/39316/Select-Board-Meeting-Packet-October-17-v3>

Minuteman Media Network Coverage: <https://www.youtube.com/watch?v=nn951y6tdwQ>

**Town of Concord
Select Board
Minutes
October 17, 2022**

Appendix A

I. Statement from Michael Lawson of 1695 Lowell Road and member of the Concord Municipal Affordable Housing Trust:

Good evening and thanks for the opportunity to speak with you this evening about the Junction Village/Christopher Heights project.

The Concord Municipal Affordable Housing Trust unanimously voted to allocate \$1M to the project and has also voted unanimously to urge the Select Board to write to the DHDC in support of the project. I note that these funds we have allocated are already available, and this allocation does not require an additional appropriation.

We prepared a set of slides and submitted them to you; and, they are available of the Select Board site by following the Meeting Materials link. This evening I would like to summarize those slides and conclude with brief remarks outlining the consequences of not supporting this project.

First, a reminder that the JV/CH project is 83 assisted living units all of which would qualify as affordable. This project has been in development for almost a decade and will be built on a site given by the State only for affordable housing and open space use.

The developer, Grantham Group, has completed similar projects in other towns and has a good reputation with the State. There is preference for Concord residents when opened, subject to State rules on local preference that apply to all such projects.

With the addition \$1M the Trust has allocated together with the \$2M pledged by the Town, this would bring the per unit cost of 83 units to \$36,000. No other affordable housing proposal could come close to this per unit number. This, then, is by far the most economical way to add affordable units.

The allocation of funds we've approved and our request for a letter of support is made necessary by the COVID induced significant inflation which increased the project cost from 17M to 28M. This inflation has affected all construction projects, including our own Middle School project. The State is attempting to help a number of projects with additional tax credits but has required projects to have addition municipal financial and policy support to be eligible.

There is a clear need.

- Concord has seen no change in affordable housing units in the last decade.
- The over 65 population in Town is 37% and growing.
- Without this project Concord will fall below 10% and put us at 40b risk.
- Small houses are vanishing to be replaced by larger, less affordable, homes in Town.

If we fail to support the project.

Concord will have lost a cornerstone of its affordable housing effort

- It has been supported by Town Meeting votes on numerous occasions
- Affordable housing was an important goal of the most recent long-range plan, Envision Concord

**Town of Concord
Select Board
Minutes
October 17, 2022**

- The project was included in the 2016 Housing Production Plan approved by the Select Board
- The project's support was recently reaffirmed by a unanimous vote of the Planning Board.
- Without this project there will be no new affordable assisted living units for our elders and no new tax revenue.
- Concord will fall below 10% of its Subsidized Housing Inventory.

Finally, we may lose the opportunity to move forward with the fossil free construction initiative, which may require 10% affordable housing to be eligible – a reasonable requirement for environmental justice.

We urge you to support this project and the Trust's million-dollar allocation.

II. Statement from Alice Kaufman of 1615 Lowell Road:

I am Alice Kaufman, 1615 Lowell Road, former Select Board member, and principal author of the Concord's bylaw requiring new construction to be fossil fuel free.

The Select Board has been asked to honor its commitment to basic ideals for fairness and equity in housing policy. And, to build a community that is welcoming and supportive of a diverse population by ensuring that we build an assortment of housing options, for elders, and new families, or that allows residents to downsize, and that lowers the barriers to entry into our community and our schools.

You will hear many arguments this evening that urge support for the Junction Village project. I will speak to the environmental imperative embedded in the board's decision.

Climate change is real, undeniable by the science and evidence. Globally, we are asked to take bold steps to reverse course to ensure a healthy planet that can support life. Predictions are dire, but it's not too late to take immediate action.

In 2017 Town Meeting voted to commit to the goals of the Paris Climate Accord, and to develop a climate action and resiliency plan. We have strengthened town zoning to reflect the urgency of climate action and Town Meeting in 2021 passed by near unanimous consent, a town bylaw requiring new construction to be fossil fuel free. That last vote stands in balance as the Select Board debates the financial value of increased funding for Junction Village.

Both, the climate emergency, and town principles for affordable housing, are at risk tonight as the Select Board grapples with the short-term financial interests over long term values driven policies that foster ours and the Commonwealth's goals for affordable housing. It seems to me that the debate about the finances is off the table with the CHDC pledging to financially support the town by using funds from the Affordable Housing Trust.

Reducing fossil fuel use is an imperative for a global low carbon future. Of course, the oil and gas industry opposes efforts to reduce their market share but now is not the time to kowtow to industry interests over people's interests.

The Massachusetts progressive climate bill, signed by Gov. Baker earlier this summer, (and authored by our own State Senator Michael Barrett) recognizes the need to act now. Through steeped negotiations with the state legislature, the bill rightly is concerned with ensuring that those

**Town of Concord
Select Board
Minutes
October 17, 2022**

residents most at risk, those living in our frontline communities, share in the health benefits of lowered harmful emissions from the burning of fossil fuels. And, wisely, wrote into the bill that 10 communities who had already passed new bylaws restricting the expansion of the fossil fuel market in their communities may do so BUT only if those communities meet the state's affordable housing goal of 10%.

Just last month, Kerry LaFluer, with approval of the Select Board, sent a letter of intent to the state to secure our position as one of the original 10 communities ready to take action on climate. The rules for participation in the 10-community pilot have not been written yet. I urge you not to jeopardize our position in line to be one of the 10 communities.

One of the most difficult decisions as a member of the Select Board is considering how best to meet the varying expectations, desires, and needs of the Concord community. I am suggesting that with your support of Junction Village you can meet 2 very important values of our town – honoring our commitment to providing at least 10% of our housing stock as affordable, and to the town's commitment to meeting the existential threat of climate change by following through on our Climate Action Plan.

It appears to me that what is standing in our path to achieving both of these goals is the Select Board's vote to support affordable housing on a piece of landed deeded for this express purpose. The Junction Village project is the result of negotiation, community dialogue, and design reviews that led to this project. It is shovel ready and we ought not delay as much of Concord's good intentions lay in the balance here.

I urge you to send a letter in support of the Junction Village.

III. Stephan Bader of 7 River Street and Vice-Chair of the Concord Housing Authority: The Concord Housing Authority has a history of providing affordable housing to residents of Concord since its inception in 1961. The Authority continues to seek additional opportunities to expand the number of available housing units for people with incomes below the Boston-area median, as determined by HUD and DHCD.

At our last monthly meeting, the CHA Board of Commissioners voted to convey their strong opinion that the Town of Concord should continue to support creation of the 83-unit Christopher Heights / Junction Village affordable assisted living development. Many of our current senior residents will likely need additional assistance as the years go by, and the least disruptive move for them - and their families and friends - would be to the type of setting that this development would offer. Social connections are important and could be maintained when living in the same town. A reasonable expectation is that most of these seniors would meet the income requirements for entry into the affordable assisted living facility.

We urge the Select Board to express their support for the project and to endorse the funding offered by the Concord Municipal Affordable Housing Trust to resubmit for State approval. The beneficiaries will include our neighbors and the Town as a whole. Thank you.

IV. Linda Nieman of 59 Mallard Drive and Co-Coordinator of Mother's Out Front: We are writing in support of the proposed construction of Junction Village (Christopher Heights) assisted living community. Concord has a need for affordable housing that allows our eldest residents to remain in Town near their families. While the proposed project may not be perfect, it

**Town of Concord
Select Board
Minutes
October 17, 2022**

meets the immediate and pressing needs of the community now. And high density housing is a key stepping stone toward achieving the Town's mandated climate goals.

Concord must reduce its greenhouse gas (GHG) levels by 80% by 2050, as outlined by Concord's Energy Goals (Article 51, 2017). This requires tackling the greatest source of town GHG emission - the built environment. To ensure that we achieve this goal, residents voted to approve a Bylaw Amendment Regulation of Fossil Fuel Infrastructure (Article 31, 2021), requiring new construction and major renovations to be fossil fuel free, and at the same time requested Home Rule authority to implement it. Both articles were overwhelmingly approved by Concord residents, underscoring that residents want bold climate action.

Approval of this project by the Select Board will allow Concord to move forward with its application to participate in the home rule petition pilot program. The program requires a participating community to have at least 10% affordable housing. Concord barely meets this goal and may fall below it next year without the construction of Junction Village.

Construction costs have increased significantly owing to supply disruptions. While this additional cost is unfortunate, Concord has the means to make up this difference. Junction Village is an opportunity to marry our dual commitments to the environment and affordable housing; providing a safe livable home for our oldest residents while also working toward a livable climate for our youngest residents.

We urge the Select Board to provide a letter of support for Junction Village to the MA Department of Housing & Community Development for the project's reapplication for state funding under DHCD's High Readiness ARPA Funding Round.

**Town of Concord
Select Board
Minutes
November 7, 2022**

Pursuant to a notice duly filed with the Town Clerk, the Concord Select Board convened in a meeting in the Second Floor Meeting Room and via Zoom on November 7, 2022, at 6:30 PM.

Present were: Matthew Johnson, Chair; Terri Ackerman, Clerk; Henry Dane; Linda Escobedo

Call to Order

Chair Johnson opened the meeting at 6:30 PM.

Consent Agenda

Ms. Ackerman stated that she has questions regarding the Transit Bond Bill Support Letter.

Upon a motion duly made and seconded, it was UNANIMOUSLY
voted: to approve the Consent Agenda with the exception of the bond bill letter.

Town Manager's Report

Town Manager Kerry Lafleur presented the Town Manager's Report and noted that the Town's request for additional wastewater capacity was not granted, though there may be different opportunities to partner with other treatment facilities to improve the capacity.

Ms. Ackerman asked if there was a specific reason why the request for additional wastewater capacity was not granted.

Ms. Lafleur responded that she would follow up on the topic.

Chair's Report

Chair Johnson reported that the Concord Players are kicking off their season of the showing of *Little Women* by celebrating Lousia May Alcott's birthday at the end of November. Chair Johnson continued by noting a clarifying point of the recently adopted Select Board Correspondence Policy, which is that the Chair maintains discretion not to include letters from residents who have already sent previous letters on the same topic.

**Application for Liquor License Amendment – Change of Officers for Colwen Management,
DBA Residents Inn by Marriott at 320 Baker Avenue**

Chair Johnson opened the discussion regarding an application for a Liquor License Amendment for a Change of Officers for Colwen Management, DBA Residents Inn by Marriott, at 320 Baker Avenue. The full application is included in the Board's packet.

**Town of Concord
Select Board
Minutes
November 7, 2022**

Attorney Jon Aieta appeared before the Select Board on behalf of the applicant to answer any questions that the Board had.

Ms. Escobedo asked for the date of the Department of Revenue Certificate of Tax Compliance that was included in the application.

Senior Administrative Assistant Shannon McAndrew clarified that the date was July 19, 2022.

Attorney Aieta stated that he would provide a certificate dated September 2022 by the next day.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the application for a Liquor License Amendment for a Change of Officers for Colwen Management, DBA Residents Inn by Marriott, at 320 Baker Avenue.

Department of Planning and Land Management Update

Marcia Rasmussen, Director of Planning and Land Management, appeared before the Select Board to provide a departmental update. Ms. Rasmussen noted that many members of the department are newly hired, but the department had been working together during times of vacancies. Departmental division heads were in attendance to provide more specific updates.

Melanie Dineen, Public Health Director, appeared before the Select Board to provide an update from the health division. Ms. Dineen noted that recently, Emerson Health contacted the health division to let them know they wanted to terminate their contract with the Town, effective November 4, 2022, which left the division scrambling to find a replacement. Ms. Dineen continued that the health division had also faced challenges with staffing, with two longtime members of the division retiring. Positions have been difficult to fill.

Mr. Dane asked why Emerson Health terminated their contract with the Town.

Ms. Dineen responded that Emerson Health lost their staff member that was performing the contracted work.

Delia Kaye, Natural Resources Director, appeared before the Select Board to provide an update from the natural resources division, noting that the division is busy with permitting and enforcing the Wetlands Protection Act and Concord Wetlands Bylaw. Ms. Kaye also noted of challenges with staffing the vacant Assistant Natural Resources Director position. Ms. Kaye continued with an update on the Warner Pond project, in which the Town went out to bid and the only bid received was significantly over budget. Ms. Kaye stated that the natural resources division was planning to hold a community forum on the Warner Pond project.

Elizabeth Hughes, Town Planner, appeared before the Select Board to provide an update from the planning division. Ms. Hughes stated that she had been working with the Planning Board on developing the new Scenic Road Bylaw, working with consultants to draft new rules and

**Town of Concord
Select Board
Minutes
November 7, 2022**

regulations for site plan reviews, and working with consultants on the Assabet River pedestrian footbridge project.

Mr. Dane asked when the planning division works with consultants if there is a written memorandum on the scope of work the consultants are to complete.

Ms. Hughes responded that the Request for Proposals generally outlines the purpose and the scope of work the consultants are to perform.

Paul Creedon, Building Commissioner, appeared before the Select Board to provide an update from the building division. Most members of the division are newly hired. Mr. Creedon noted that he also served as the Zoning Enforcement in Town and had been working on the inspections of different buildings, such as clubs and restaurants, in conjunction with the Fire Department. Mr. Creedon continued that the building division has converted to an E-Permitting system. Like other divisions, Mr. Creedon noted of challenges with staffing, and the division is looking to hire an additional full-time, benefitted Inspector, as he is concerned that other part-time Inspectors will leave for other full-time opportunities.

Beth Williams, Economic Vitality and Tourism Director, appeared before the Select Board to provide an update from the economic vitality and tourism division. Ms. Williams noted that tourism has increased in the past years, and more so throughout this Fall, especially with more tours offered and the Concord Trolley.

Ms. Ackerman asked if the letter of support included in the Consent Agenda was for the Transportation Bond Bill or for the Concord Trolley.

Ms. Rasmussen responded that the letter of support was for the Transportation Bond Bill.

Ms. Hughes added that the challenge with the Transportation Bond Bill is that the funding was included in the bill, but not appropriated. Ms. Hughes continued that the letter of support was an effort to urge the legislature to appropriate the funding from the bill.

The Select Board concurred that they would like the letter of support clarified before its approval.

Ms. Rasmussen added that she has pushed her retirement date to May 31, 2023 as a result of the Bruce Freeman Rail Trail not being complete until Spring 2023, along with the Housing Production Plan, which is to be approved in January 2023.

West Concord Cultural Signage Presentation by Marcia Rasmussen

Marcia Rasmussen, Director of Planning and Land Management, appeared before the Select Board to provide a presentation on the placement of cultural signage in West Concord. The full presentation was included in the Board's packet.

**Town of Concord
Select Board
Minutes
November 7, 2022**

Chair Johnson asked about wayfinding signs.

Ms. Rasmussen responded that wayfinding signs are separate from the cultural signs and that they would have to go back before the West Concord Advisory Committee and West Concord Cultural Committee.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the West Concord cultural signage locations as included in the Board's packet.

Update on Select Board Goals

Chair Johnson opened the discussion regarding an update on the Select Board goals for Fiscal Year 2023. The full list of the Select Board's goals was included in the Board's packet. Chair Johnson discussed the list per quarter of the year, along with their status of completion. Chair Johnson highlighted an acknowledgement for residents that submit volunteer cards to serve on Boards and Committees, updating Boards and Committees charges, and developing a strategy to increase the number of affordable housing units.

Committee Nominations

The Select Board nominated Amy Beamer of 383 Pope Road to Concord Cultural Council for a term to expire April 30, 2025 and Karl Liebich of 12 Deer Grass Lane, Jen Keegan of 60 Highland Street, Beth Kelly of 39 White Avenue, and Jennifer Parker of 247 Laws Brook Road for a term to expire December 2023, following the completion of their final report to the Select Board.

Committee Appointments

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to appoint Katherine Ryan of 109 Stone Root Lane to the Personnel Board for a term to expire May 31, 2025 and to appoint Peter Lowitt of 5 Westvale Drive for a term to expire on April 30, 2025 and a corrective appointment of Lee Smith of 1836 Main Street for a term of May 31, 2020 to May 31, 2023 to the Concord Housing Development Corporation.

Select Board Liaison Reports

Chair Johnson reported on:

- Middle School Building Committee – The committee reaffirmed their request for a Special Town Meeting warrant article for an additional \$115,000,000.00 in funding for the project
- Diversity, Equity, and Inclusion Commission – The commission had a discussion with the Police Chief regarding policies and procedures

**Town of Concord
Select Board
Minutes
November 7, 2022**

Ms. Ackerman reported on:

- 250th Committee Community Forum
- PEG Access Advisory Committee – The committee is working on the 10-year contract with Comcast as the current contract expires in 2024
- Bruce Freeman Rail Trail Committee – All cities/towns that the Bruce Freeman Rail Trail runs through met to discuss uniform safety rules, which the Committee will present to the Select Board for endorsement
- 2229 Main Street Oversight Committee – Writing a charge for a Task Force, but currently putting a pause on this project until the Spring due to a medical leave of absence

Mr. Dane reported on:

- 250th Committee Community Forum – A highly attended and successful forum was held at the Library
- Public Ceremonies and Celebrations Committee – Working with the Committee to fill vacancies, as the Committee will play an important role in planning for the 250th Anniversary Celebration

Ms. Escobedo reported on how she attended several different Board and Committee meetings, though a common theme was looking forward to alternative plans for affordable housing units in Concord and for the Housing Production Plan's completion. Ms. Escobedo continued that an additional common theme was warrant articles for the Special Town Meeting and noted that the Annual Town Meeting warrant articles will also be due shortly. Ms. Escobedo attended:

- Concord Municipal Affordable Housing Trust
- Community Preservation Committee
- Concord-Carlisle League of Women's Voters
- Concord Housing Authority
- Massachusetts Municipal Association Conflict Management Seminar

Correspondence

Chair Johnson acknowledged an item of correspondence from Frank Feeley regarding Special Town Meeting warrant articles.

Public Comment

Richard Santoro of 625 Lowell Road appeared before the Select Board to comment on litigation against the Town by a developer whose project was denied by the Historic Districts Commission at 615 Lowell Road. Mr. Santoro asked that the Town support the Historic Districts Commission's decision.

**Town of Concord
Select Board
Minutes
November 7, 2022**

Ms. Lafleur noted that the Town recently received an update from Town Counsel regarding the stipulation and that there are ongoing negotiations between the Town and the developer to provide a more suitable development at the location.

Chair Johnson added that any revised design would be required to go back before the Historic Districts Commission.

Louis Salemy of 68 Great Meadows Road appeared before the Select Board to provide comments on the Middle School building project. Mr. Salemy's written statement is included in Appendix A.

Toby Chaudhuri of 100 Keyes Road appeared before the Select Board to introduce himself and thank those who presented on important issues at that evening's Board meeting.

Martin Lueck of 8 Barratts Mill Road appeared before the Select Board to provide comment on litigation against the Town by a developer whose project was denied by the Historic Districts Commission at 615 Lowell Road.

Adjourn

Chair Johnson adjourned the meeting.

Meeting Materials: <https://concordma.gov/DocumentCenter/View/39652/Select-Board-Meeting-Packet-Noveber-7-2022>

Minuteman Media Network Coverage: <https://www.youtube.com/watch?v=D6iTE409uRE>

Appendix A

I. Statement from Louis Salemy of 68 Great Meadows Road:
Members of the Select Board:

As both a former regional school committee member and vice-chair of the CCHS building project, I think it is fair to state that I am a huge supporter of the schools. While I was on the regional school committee, I put students first in my decision-making process. However, when making decisions, I was mindful of the "social contract" that I viewed existed between families with students using the school system (30% of residents) and those families who no longer had kids in the school system (70%). Concord has a long history of supporting its school system and allocates a large percentage of its budget towards its school system. It is why many families are attracted to the town. Families with kids who graduated feel a moral obligation to support the

schools-the same was done for them when their kids were using the school system. This support is there because residents who no longer use the school system believe that the schools are being managed in a fiscally responsible manner.

**Town of Concord
Select Board
Minutes
November 7, 2022**

I have been following the middle school building project closely since it was formed and supported the initial decision to move forward with a new building. However, I view the rhetoric around the project's recent budget difficulties disturbing and divisive. I applauded the decision last week by Select Board to increase the budget for the middle school project by \$7mm to \$110mm.

While it was less than the \$115mm that was requested by the building committee, it still represents a healthy increase to the budget. The Select Board is trying to balance the needs of the school with the all the residents of Concord. To suggest that the students of Concord are somehow being shortchanged by this decision defies credibility. It also violates the social contract that I previously described. The building committee needs to show residents in Concord that it is doing everything it can to manage the overall cost of the project. The middle school project will cause the average household a yearly increase in their taxes of \$1,400 versus the high school project of \$450. A building with a \$110mm construction value will serve the students of Concord well for many years to come. Importantly, and what is lost, is that the Select Board set the budget to a level that should generate a favorable outcome at special town meeting in January. If it is set too high, the risk of failure increases. Failure would result in the budget being put back to the \$102mm level and substantially higher cuts to the building. You have done the building committee and the students a favor by being pragmatic in your approach.

My concern with the project is that the bids for the project are going to come in well above the new budget of \$110mm. There is ample precedent for this: recent bids for the Somerset, Westwood, and Swampscott building projects all have received bids well in excess of the budget value approved at their respective town meetings. Each of these projects only received three bids: the construction market remains tight and subs are only willing to take on new work that are rates well above the going rate. The building committee needs to undertake further VE today and build a cushion that will allow them to absorb higher bids, which will allow them to start construction in May per their schedule. Should they ignore what every school project in Mass is experiencing and the bids come in well above the new \$110 mm budget, they will face costly delays and higher redesign fees from the architect and OPM. These costs could easily reach \$5mm and force them to take even greater VE to pay for these higher costs. The time to take VE is today-not in April when it is too late.

The Select Board is in the uncomfortable position of overseeing the building project and wanting to avoid making day to day decisions in terms of how it is being managed. I respectfully request that the Select Board have the building committee answer the following questions after consulting with the architect and OPM: what is the likelihood that the bids will be above the construction budget and what will be the total cost should this occur. To me, this outcome is inevitable and the building committee needs to tackle these issues head on.

**Town of Concord
Select Board
Minutes
November 28, 2022**

Pursuant to a notice duly filed with the Town Clerk, the Concord Select Board convened in a meeting in the Second Floor Meeting Room and via Zoom on November 28, 2022, at 6:30 PM.

Present were Matthew Johnson, Chair; Terri Ackerman, Clerk; Henry Dane; Linda Escobedo; Mary Hartman

Special Town Meeting Public Hearing

Chair Johnson opened the Public Hearing.

Article 1 – Fossil Fuel Infrastructure: Confirm Authorization to Apply for Participation in Fossil Fuel-Free Demonstration Project

Chair Johnson presented on Article 1 – Fossil Fuel Infrastructure, which would revise the previously filed Home Rule Petition to align with state law. The full presentation is included in the Board’s packet.

Article 2 – Reauthorize Special Legislation Petition – Real Estate Transfer Fee for Affordable Housing

Keith Bergman, Chair of the Concord Municipal Affordable Housing Trust presented on Article 2 – Real Estate Transfer Fee, which would reauthorize the previously filed Home Rule Petition for the 2023-2024 legislative session for Concord to impose a 1% real estate transfer fee on the buyer for a portion of purchase prices above \$1,000,000.00.

Article 3 – Reauthorize Special Legislation Petition – Building Permit Fee Surcharge for Affordable Housing

Mr. Bergman continued and presented on Article 3 – Building Permit Fee Surcharge, which would reauthorize previously filed Home Rule Petition for the 2023-2024 legislation session for Concord to impose a building permit surcharge for deposit in the Concord Municipal Affordable Housing Trust Fund. Mr. Bergman noted that revenue estimates for the building permit surcharge will depend upon the surcharge rate that the Select Board adopts. The full presentation for both Articles 2 and 3 is included in the Board’s packet.

Mr. Dane asked what the dollar amount is of the AMI.

Mr. Bergman responded that he would include this information moving forward.

Ms. Ackerman asked if other cities and towns have adopted a similar building permit fee surcharge and if so, what have their numbers looked like.

Mr. Bergman responded that he is aware of several other cities and towns that have adopted a real estate transfer fee, but not a building permit surcharge.

Chair Johnson closed the Public Hearing.

**Town of Concord
Select Board
Minutes
November 28, 2022**

Fiscal Year 2023 Classification Public Hearing with the Board of Assessors

Upon a motion duly made and seconded, it was UNANIMOUSLY
voted: to open the Fiscal Year 2023 Classification Public Hearing.

David Karr, Chair of the Board of Assessors, appeared before the Select Board to present on the Fiscal Year 2023 tax classification, in which it must be determined if the Town will distribute the tax levy equally among all classes of property or to reduce the share of the levy by the residential classes and shift some of the burden to the commercial, industrial, and personal property classes. Mr. Karr stated that the recommended Fiscal Year 2023 tax rate is \$12.96 per \$1,000.00 of assessed value. The full presentation is included in the Board's packet.

Chair Johnson noted that a previous discussion between the Select Board and the Board of Assessors had concluded that it was not feasible to implement the residential exemption for FY23. However, considering that the Select Board might choose to implement it in FY24, he requested that Board of Assessors to report back in 3 months (end of February) regarding preparations that would need to be made.

Meredith Stone, Town Assessor, clarified that residents would have to apply and further qualify for the residential exemption.

Ms. Hartman asked how residents qualify.

Ms. Stone responded that a resident must have been a Massachusetts resident for 10 years.

Mr. Karr estimated that 90% of single-family homes in Town would qualify.

Elizabeth Crowell of 212 Hubbard Street asked if a person would qualify for the residential exemption if they had been a resident for 10 years, but at different addresses.

Ms. Stone responded that as long as the person has lived in Massachusetts for 10 years, they will qualify.

Pamela Dritt of 1304 Concord Greene asked if the automobile tax is the same as personal property tax.

Ms. Stone responded that the automobile tax is not considered personal property.

Upon a motion duly made and seconded, it was UNANIMOUSLY
voted: to approve a single tax rate.

Upon a motion duly made and seconded, it was UNANIMOUSLY
voted: to not adopt a small commercial exemption.

**Town of Concord
Select Board
Minutes
November 28, 2022**

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to not grant an open space discount.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to not adopt a residential exemption at this time.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to close the public hearing.

Vote Language of the Special Town Election Ballot and Determine Date of Election

Chair Johnson opened the discussion regarding the language of the Special Town Election Ballot. Chair Johnson noted that draft language from Bond Counsel was included in the Board's packet.

Mr. Dane asked if the pros and cons of the ballot question could be included on the ballot itself.

Kaari Tari, Town Clerk, appeared before the Select Board and noted that it is not legal to include the pros and cons of the ballot question on the ballot.

Chair Johnson asked if pros and cons of the ballot question could be included in the mailings for residents that request to vote by mail.

Ms. Tari responded that she was not sure if it can be included in the mailing, but that election information material is permitted at polling locations.

Chair Johnson asked if the informational packet would be sent to all residents.

Ms. Tari responded that was correct.

Mr. Dane asked if the pros and cons statements regarding the ballot question could be posted in the voting booths so that residents do not have to ask for them.

Ms. Tari responded that she would ask if that would be permitted.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the Special Town Election ballot language as included in the Board's packet.

Chair Johnson noted that the Select Board received a large amount of correspondence regarding the date of the Special Town Election, which had been proposed to be on February 23rd. Residents were concerned that since the proposed date was during the school's February Break, it might negatively affect the opportunity to vote.

Board members noted that the February 23rd date was an administrative oversight and

**Town of Concord
Select Board
Minutes
November 28, 2022**

unfortunately no one had realized this date was during school vacation week.

Kaari Tari, Town Clerk, suggested that the Special Town Election date be changed to Thursday, February 16, 2023.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the Special Town Election date as Thursday, February 16, 2023.

**Liquor License Amendment Application for Change of Managers for
Fiorella's at 24 Walden Street**

Mr. Dane recused himself from this agenda item due to business involvement with the item.

Leslie Palola, Manager of Fiorella's, appeared before the Select Board to present the Liquor License Amendment Application for a Change of Managers at Fiorella's. Ms. Palola noted that she has been the General Manager at Fiorella's since it opened and that this is a formalization of placing her on the Liquor License.

Upon a motion duly made and seconded, it was **voted:** to approve the Liquor License Amendment Application for a Change of Managers for Fiorella's at 24 Walden Street as included in the Board's packet. The motion passed 4-0-1, with Mr. Dane abstaining.

**Discuss Potential Select Board Warrant Articles for Annual Town
Meeting Scheduled on April 30, 2023**

Chair Johnson opened the discussion on potential Select Board Warrant Articles for Annual Town Meeting to be held on April 30, 2023. Chair Johnson noted that he attended a joint meeting with the Comprehensive Sustainability and Energy Committee and the Climate Action Advisory Board and discussed a Warrant Article to adopt the Department of Energy Resources' new Specialized Stretch Energy Code.

Chair Johnson continued that there is a Warrant Article to allocate Community Preservation Committee affordable housing reserve funds to the Concord Municipal Affordable Housing Trust, which the Community Preservation Committee is drafting.

Chair Johnson continued and stated that there is also a proposed Warrant Article to allocate free cash amount to the Concord Municipal Affordable Housing Trust, but that the Trust is not requesting funds this year, as it has done in previous years.

Ms. Hartman asked if the Concord Municipal Affordable Housing Trust was planning to ask for the funding that was previously allocated for the Christopher Heights project.

Chair Johnson responded yes, and that was the reason that the Trust was not requesting any allocation from free cash this year.

**Town of Concord
Select Board
Minutes
November 28, 2022**

Mr. Dane added that he is working with the Town Manager on a potential Warrant Article for funding appropriations for the 250th Anniversary Celebration, though he is not sure on the exact proposed amount of funding at this time. Mr. Dane noted that the funding would be spread over two years.

Ms. Ackerman asked if the events for the 250th Anniversary Celebration were planned to be free of charge or subject to admissions fees.

Mr. Dane responded that those questions would be discussed during future months of planning.

Ms. Ackerman noted that the Personnel Board will also have Warrant Articles to add.

Proposed Amendment to the White Pond Task Force Charge

Ms. Hartman discussed the proposed amendments to the White Pond Task Force charge. They clarify rules for swimming at White Pond in the Background section of the charge and change the number of members from five to seven residents. Ms. Hartman noted that there were many qualified residents that wanted to volunteer on the Task Force, which was why she recommends increasing the membership. The proposed amendments are highlighted in yellow in the Board's packet.

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the amended White Pond Task Force charge as included in the Board's packet.

Committee Nominations

Committee nominations were Joe Emerick of 611 Old Bedford Road to the Personnel Board for a term to expire April 30, 2025 and Elissa Brown of 5 Concord Greene, Unit 1 to the White Pond Task Force for a term to expire December 2023, upon completion of their final report to the Select Board.

Committee Appointments

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to appoint Evan Ricker of 104 Bolton Street to the White Pond Task Force for a term to expire December 2023, upon completion of their final report to the Select Board.

Select Board Liaison Reports

Ms. Ackerman did not have a report.

Mr. Dane did not have a report.

Ms. Escobedo reported on:

- Attended a meeting sponsored by the MSA regarding affordable housing funding
- Concord Housing Authority – Term of a member is expiring soon and there are new membership guidelines, which is removing one elected official member and replacing the

**Town of Concord
Select Board
Minutes
November 28, 2022**

seat with an additional resident tenant member

Ms. Hartman reported on:

- Economic Vitality Committee – Interested in two Warrant Articles to be proposed by the Planning Board for Annual Town Meeting which are to permit food trucks under certain circumstances and to permit fast food restaurants, which is important in planning for tourism during the 250th Anniversary Celebrations
- Housing Production Plan Forum
- Ribbon Cutting Ceremony at Concord Park
- Finance Committee – Presentation on debt service that the Select Board should take a closer look at

Chair Johnson reported on:

- Housing Production Plan Forum
- Climate Action Advisory Board – Plans to draft a Warrant Article for Annual Town Meeting regarding the adoption of a specialized energy code
- Middle School Building Committee – Committee voted to increase the budget by re-including two items that had been value engineered out of the project
- Finance Committee Guidelines Hearing – The guideline has been raised from 3% to 3.65%, with 5% for the Town and the remainder split between CPS and the Regional School District
- School Committee
- Louisa May Alcott Day Proclamation on November 27th for her 190th birthday

Correspondence

Chair Johnson acknowledged the items of correspondence that were included in the Board's packet.

Consent Agenda

- Town Accountant Warrant: November 17, 2022, November 23, 2022
- One Day Liquor License Application for the Umbrella Arts Center at 40 Stow Street on December 6, 2022 from 6:30 PM to 9:00 PM for Wine and Malt Beverages for the Annual Meeting
- One Day Liquor License Application for Concord Youth Theatre, Inc. At 579 Old Bedford Road on January 7, 2023 from 7:00 PM to 11:00 PM for Wine and Malt Beverages for a Fundraiser Event
- Gift Acceptance in the amount of \$2,500.00 from Trashology for the West Concord Mural Project

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the consent agenda.

Town Manager's Report

Ms. Lafleur reported that she has appointed Captain Tom Mulcahey to the position of Interim Police Chief effective December 23, 2022, upon retirement of current Police Chief Joseph

**Town of Concord
Select Board
Minutes
November 28, 2022**

O'Connor. Ms. Lafleur continued and thanked Dr. Deb Greene for her service on the Board of Health, who was instrumental on the Board during the pandemic. Ms. Lafleur concluded that the Land Court recently ruled in favor of the Town on the decision of Estabrook Road, but that there is no further comment at this time while the Town reviews the decision with Town Counsel.

Chair's Report

Chair Johnson reported that in response to the Land Court ruling in favor of the Town on the decision of Estabrook Road, he reminds residents to be respectful of private property and to follow the rules that are established for the trail.

Ms. Ackerman asked if the Select Board has its meeting dates set for January through April 2023.

Chair Johnson responded yes, and recited the list of future meeting dates. The Select Board meeting dates are also posted on the Town's website on the Town Calendar.

Public Comment

Court Booth appeared before the Select Board to invite the Select Board to a gathering this Sunday, December 4, 2022 at 2:00 PM at the Fenn School with the Human Rights Council who is hosting a conversation with Police Chief Joseph O'Connor.

Adjourn

Chair Johnson adjourned the meeting.

Meeting Materials: <https://concordma.gov/3213/November-28-2022>

Minuteman Media Network Coverage: <https://www.youtube.com/watch?v=15-022Mo7-Y>



OLD NORTH BRIDGE

TOWN OF CONCORD

TOWN HOUSE - P.O. BOX 535
CONCORD, MASSACHUSETTS 01742

December 9, 2022

The Honorable Michael J. Barrett
State House
24 Beacon Street, Room 109-D
Boston, MA 02133

Representative Tami L. Gouveia
State House
24 Beacon Street, Room 146B
Boston, MA 02133

Representative Carmine L. Gentile
State House
24 Beacon Street, Room 167
Boston, MA 02133

Re: MassTRAC

Dear Representative Gouveia, Representative Gentile, and Senator Barrett,

Concord has long been committed to providing the best service for both residents and visitors to the area. The Town's history is intertwined with the founding and social development of our nation, from the first day of the American Revolution to the transcendentalist and abolitionist movements of the 1800s. Concord's principled approach to development continues today, as the town implements its *Climate Action Plan* to deliver more sustainable solutions to complex problems.

Transportation is a nexus in the Town's sustainability and economic development goals and is a driving factor in expanding these initiatives in Concord. Concord has worked with the towns of Lexington and Lincoln along with the Minute Man National Historical Park on a feasibility study and is ready to implement a regional shuttle program with the funds approved in the Transportation Bond Bill and signed by Governor Baker in August 2022.

Through a short PILOT program this summer and fall, Concord has successfully tested the route and shown that we can reduce the number of cars on our roads, the new availability of this region through public transportation using the MBTA Commuter Rail, and the economic and community benefits of having a shuttle service in Concord. This is in addition to the sustainability benefits

found through taking individual cars off the road. We are ready to continue this service and bring it to our partners in Lincoln, Lexington, and the Minute Man National Historical Park.

This shuttle program would allow access for many new people to the region which currently has no practical way to travel between the towns without a vehicle. It would create a more complete multi-modal transportation system for visitors and locals alike between the National Park and the towns of Concord, Lexington and Lincoln. This service would be instrumental in promoting safety for the community, providing multi-modal transportation options, reducing traffic, increasing economic development benefits for all three towns, and working towards our sustainability goals.

The need for funding is imminent as we approach 2025, when the country will celebrate the 250th Anniversary of the ‘shot heard round the world’ and the anticipated influx of tourists to our towns. We are aiming to have at least one year of service prior to 2025 to test out the inter-town route and ensure that we have smooth service. Our goal would be to start service in April of 2023 to ensure multiple years of service for our communities and continue the momentum and excitement garnered this year during the PILOT program in Concord.

The Town of Concord is excited by this opportunity to reduce the number of vehicles on the road, support multi-modal transportation options, support our historic and cultural assets, and to continue to expand opportunities for more people to visit and learn from this incredibly diverse and historically rich area. We attach as a courtesy a recent letter sent by the Concord Town Manager to the Massachusetts Department of Transportation and the Executive Office of Administration and Finance regarding this pilot funding.

The Concord Select Board is proud to support the Regional “Minute Man” Shuttle project and request that funds be appropriated to this project for the coming year which will help empower the region and continue to improve access to our public lands and historic region.

Sincerely,

Matthew Johnson, Chair
Concord Select Board

CC: Kerry A. Lafleur, Town Manager
Senator Brendan P. Crighton, Co-Chair, Joint Committee on Transportation
Representative William M. Strauss, Co-Chair, Joint Committee on Transportation

RECEIVED
DEC - 7 2022
TOWN OF CONCORD
TOWN MANAGER'S OFFICE

TOWN OF CONCORD

PAID

SUNDAY ENTERTAINMENT LICENSE APPLICATION
(to be submitted with Form 90)

Fee payable to "Town of Concord": \$50.00
Fee payable to "Commissioner of Public Safety": \$2.00 (1:00 PM - Midnight) or \$5.00 (before 1:00 PM)

Application Date: 12/5/22
Applicant Name (print): Carole Wayland
Applicant Address: 6 Abbott Lane Apt. 6
Concord MA 01742
Name of Organization: 51 Walden, Inc.
Telephone #: 978 369-2911

The undersigned hereby applies for a Sunday Entertainment License in accordance with the provisions of the State relating thereto:

Sunday Entertainment License for: The Marriage of Figaro
Mozart opera
(insert description of Entertainment)

in or on the property at 51 Walden Street

on Dec. 18 2022 (date), from 2 PM to 5 PM

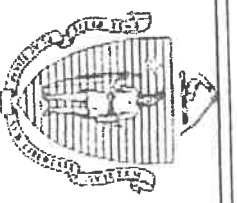
in accordance with the rules and regulations made under authority of said Statutes.

Town Fee Paid \$ 50.00 State Fee Paid \$ 2.00

Please complete and return this form, Form 90, and payments to: Town of Concord
If mailing, mail to: Selectmen's Office, Town House, P.O. Box 535, Concord, MA 01742

State Fee \$ 2
Municipal Fee \$ 50

THE COMMONWEALTH OF MASSACHUSETTS
OF _____
LICENSE



For PUBLIC ENTERTAINMENT ON SUNDAY

The Name of the Establishment is The Performing Arts Center at 51 Walden in or on the property at No. _____ (address)

The Licensee or Authorized representative, 51 Walden St Concord MA 01942 in _____ (address)

accordance with chapter 136 of the General Laws, as amended, hereby request a license for the following program or entertainment:

DATE	TIME	Proposed dancing or game, sport fair, exposition, play, entertainment or public diversion
12/18/22	2pm.	The Marriage of Figaro

Hon. _____ Chairman of Board of Selectmen, _____ (City or Town)

Fees per occurrence (Individual Sunday(s)): Regular Hours (Sunday 1:00 pm - Midnight): \$2.00; Special Hours (Sunday 12:00 am- Midnight): \$5.00. Annual Fee (For Operating on every Sunday in calendar year): Regular Hours (Sunday 1:00 pm - Midnight): \$50.00; Special Hours (Sunday 12:00 am- Midnight): \$100.00

This license is granted and accepted, upon the understanding that such entertainment that the licensee shall comply with the laws of the Commonwealth applicable to licensed entertainments, and also to the following terms and conditions: The licensee shall at all times allow any person designated in writing by the Mayor, Board of Selectmen, or Commissioner of Public Safety, to enter and inspect his place of amusement and view the exhibitions and performances therein; shall permit regular police officers, detailed by the Commissioner of Public Safety or Chief of the local Police Department to enter and be about this place of amusement during performances therein; may employ to preserve order in his place of amusement only regular or special police officers designated therefore by the Chief of Police, and shall pay to said Chief of Police for the services of the regular police officers such amount as shall be fixed by him; shall permit at all times to enter and be about his place of amusement such members of the Fire Department as shall be detailed by the Chief of the Fire Department to guard against fire; shall keep in good condition, go as to be easily accessible, such stairpipes, hose, axes, chemical extinguishers and other apparatus as the fire department may require; shall allow such members of the fire department in case of any fire in such place, to exercise exclusive control and direction of his employees and of the means and apparatus provided for extinguishing fire therein; shall permit no obstruction of any nature in any aisle, passageway or stairway of the licensed premises, nor allow any person therein to remain in any aisle passageway or stairway during an entertainment; and shall conform to any other rules and regulations at any time made by the Mayor or Board of Selectmen. This license shall be kept on the premise where the entertainment is to be held, and shall be surrendered to any regular police officer or authorized representative of the Department of Public Safety. This license is issued under the provisions of Chapter 136 of the General Laws, as amended, and is subject to revocation at any time by the Mayor, Board of Selectmen, or Commissioner of Public Safety.

This application and program must be signed by the licensee or authorized representative of entertainment to be held. No Change to be made in the program without permission of the authorities granting and approving the license.

Do not write in this box

THIS LICENSE MUST BE POSTED IN A CONSPICUOUS PLACE ON THE PREMISES

COMMONWEALTH OF MASSACHUSETTS
TOWN OF CONCORD
SELECT BOARD

PROCLAMATION

**HONORING POLICE CHIEF JOSEPH F. O'CONNOR
UPON HIS RETIREMENT AFTER 8 YEARS OF SERVICE TO THE CONCORD
COMMUNITY**

WHEREAS Chief O'Connor began his distinguished career in law enforcement in 1986 with the Town of Dennis;

WHEREAS Chief O'Connor rose through the ranks of law enforcement for the MBTA Transit Police Department from Patrol Officer to Superintendent-in-Chief from 1990 through 2014;

WHEREAS Chief O'Connor began his career in Concord when he was appointed Police Chief in 2014;

WHEREAS Chief O'Connor has demonstrated an outstanding commitment to public safety through leadership, modern policing, and community engagement;

WHEREAS Chief O'Connor has been a champion of modern and progressive causes in law enforcement for decades and serves a model leader in the law enforcement community;

NOW THEREFORE We, as the Select Board of the Town of Concord, Massachusetts, on behalf of Concord's employees, committees, community partners, and citizens, do hereby recognize Chief Joseph F. O'Connor, with deep gratitude, for his countless contributions to our community and his commitment to ensuring Concord's safety. We extend our personal best wishes in his well-deserved retirement.

Proclaimed this 19th day of December, 2022

CONCORD SELECT BOARD

Proposed Hours of Operation for West Village Tavern

Sunday – 10:00 AM – 10:00 PM

Monday – Friday – 11:00 AM – 12:00 AM

Saturday – 10:00 AM – 12:00 AM



The Commonwealth of Massachusetts
Alcoholic Beverages Control Commission

Licensing Authority Certification

Municipality: Concord

ABCC Commission Decision

APPROVED

Ralph Sacramone
Executive Director

Date of Commission Decision: 12/13/2022

License Information:

Applicant Name/DBA:	West Concord Tavern LLC / West Village Tavern	License Number (if applicable):	07249-RS-0244
Premises Address:	13 Commonwealth Avenue Concord MA 01742	Record Number:	2022-000769-RT-APP
Manager Name:	Frank A. Santo		
Class:	Annual	Granted Under Special Legislation?	Yes <input type="radio"/> No <input checked="" type="radio"/>
Category:	All Alcoholic Beverages		
On / Off Premises:	On-Premises Consumption	Is there a pledge on this license?	Yes <input type="radio"/> No <input checked="" type="radio"/>
Type:	Restaurant	Is this license under a management agreement?	Yes <input type="radio"/> No <input checked="" type="radio"/>

Transaction Type:

New/Transfer License: New

Application Contact:

Name: Frank A. Santo Title: Board Member of Entity Phone: (781) 354-7539 Email: fasanta@verizon.net

HOURS OF OPERATION - GUIDELINES

SECTION 12 ON-PREMISES -HOTELS, RESTAURANTS, CLUBS, TAVERNS AND GENERAL

Hours of sale are a matter of right as defined by ABCC as follows:

MONDAY THROUGH SATURDAY:

Sales shall not be barred between the hours of 11 a.m. - 11 p.m. for any Section 12 on-premise licensee. No sale may be made between the hours of 2 a.m. - 8 a.m. No "tavern" type licensee may serve between the hours of 1 a.m. - 8:00 a.m.

SUNDAYS:

Taverns may not serve on Sundays. For all other on-premise license holders, sales shall not be made between the hours of 1 a.m. - 12 noon unless the Board of Selectmen grants a 2 a.m. closing time (M.G.L. c. 138 § 33A) or a 10 a.m. opening time (M.G.L. c. 138 § 33B, Town Meeting 2013).

HOLIDAYS:

No Section 12 license may make sales on Christmas Day (or the Monday following when Christmas Day is on a Sunday), or Memorial Day, between 1:00 a.m. - 12:00 noon, except in those cities and Towns which have adopted an 11:00 a.m. opening time.

BOARD OF SELECTMEN ROLE:

For any on-premise Section 12 establishment, additional or different hours from those described above are at the discretion of the Board of Selectmen and will be considered at a public hearing. Alcohol must be available to be served to patrons for all of the hours posted on the license.

Changes to the hours can only be made after a public hearing before the Board of Selectmen.

POSTING LICENSE:

Once hours of operation have been determined at a public hearing they will be noted on the official license which shall be displayed on the premises in a conspicuous location where it can be easily read.

HOURS OF OPERATION - GUIDELINES

SECTION 15 OFF-PREMISE PACKAGE STORE LICENSE

Hours of sale are a matter of right as defined by ABCC as follows:

MONDAY THROUGH SATURDAY:

Any Section 15 off-premise licensee may make sales on Monday through Saturday between 8a.m. - 11 p.m. or between 8 a.m. - 11:30 p.m. on the day immediately before a legal holiday.

SUNDAYS:

As of April 5, 2004, any Section 15 off-premise licensee may make sales on Sundays. No additional permit or approval is required from the Board of Selectmen, other than the annual or seasonal Section 15 off-premise license. (MGL 2014 allows 10AM service after October 23.)

HOLIDAYS:

On Memorial Day (the last Monday in May), Thanksgiving, Christmas Day and the Monday following when Christmas occurs on a Sunday, package stores MAY NOT sell or deliver alcoholic beverages. The sale of alcoholic beverages on all other legal holidays is allowed under the annual or seasonal license, without any additional permit or approval.

BOARD OF SELECTMEN ROLE

For any off-premise Section 15 establishment, additional or different hours from those described above are at the discretion of the Board of Selectmen and will be considered at a public hearing. Alcohol must be available to be served to patrons for all of the hours posted on the license.

Changes to the hours can only be made after a public hearing before the Board of Selectmen.

POSTING LICENSE:

Once hours of operation have been determined at a public hearing they will be noted on the official license which shall be displayed on the premises in a conspicuous location where it can be easily read.

HOURS OF OPERATION

NAME OF LICENSEE:

OBA:

ADDRESS:

MANAGER OF RECORD:

ALTERNATE MANAGER OF RECORD:

HOURS OF OPERATION:

SUNDAY:

MONDAY:

TUESDAY:

WEDNESDAY:

THURSDAY:

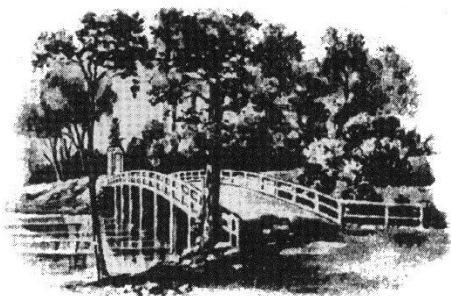
FRIDAY:

SATURDAY:

I UNDERSTAND THAT I AM REQUIRED TO BE OPEN FOR BUSINESS DURING THE TIMES LIST ABOVE AND I AGREE TO BE OPEN FOR BUSINESS DURING ALL OF THE HOURS LISTED ABOVE.

SIGNATURE

DATE



OLD NORTH BRIDGE

TOWN OF CONCORD

TOWN HOUSE - P.O. BOX 535
CONCORD, MASSACHUSETTS 01742

To: Select Board

From: Shannon McAndrew, Senior Administrative Assistant

Date: December 19, 2022

Re: Application for a Common Victualler License – New Leaf Café at 561 Virginia Road

Included in your packet tonight is an application for a Common Victualler License for New Leaf Café located at 561 Virginia Road.

New Leaf Café is not a new business and unfortunately has been operating throughout 2022 without a Common Victualler License. This is due to clerical errors on both the business's end and the Town's end.

During my time managing the renewal process, I had tried to reach out to New Leaf Café several times and could not get any response back. In communicating with the Health Department, I was informed that the business was under new ownership with Corporate Chefs, LLC. Corporate Chefs, LLC also manages the café at 300 Baker Avenue, so I then knew exactly who to reach out of for the 2023 annual license renewal.

Lori Brambles of Corporate Chefs is in attendance via Zoom this evening. When I emailed Lori asking if she also managed the license renewal for New Leaf Café, she confirmed and let me know that there was an error on Corporate Chef's end as they had not renewed the Common Victualler License for 2022. Lori quickly filled out all application materials and submitted them to me.

Tonight, Lori is seeking that the Common Victualler application be approved and renewed for the 2023 calendar year. Lori submitted payment for both 2022 and 2023, along with all necessary application materials. New Leaf Café also passed checks with the Building Department, Fire Department, Health Department, and Treasurer/Collector's Department.



TOWN OF CONCORD
Office of the Select Board
Town House
P.O. Box 535
Concord, MA 01742

GENERAL LICENSE RENEWAL FORM

This is a general license renewal form issued annually by the Concord Select Board. New applications must follow a separate process. This application must be accompanied by the following affidavits and certificates of insurance, unless otherwise exempt (): General Liability, Workers Compensation, MA Department of Revenue Attestation.*

FOR CLASS II LICENSE: This application also must be accompanied by a Surety Bond.

1. Type of License

- Class I Common Victualler Innholder/Lodging
 Class II Weekday Entertainment * Livery/Taxicab
 Common Carrier Tour Guide *

2. Applicant Information

- a. Name: Corporate Chefs @ New Leaf Cafe
b. Address: 561 Virginia Road
Concord, MA 01742
c. Mobile Phone: () - /Home Phone: (978) 372-7400
d. Email Address: lori.bramble@corporatechefs.com

3. Owner Information

- a. Name: Corporate Chefs
39 Olympia Ave, Suite 2
b. Address: Woburn, MA 01801
c. Mobile Phone: () - /Home Phone: (978-372-7400)
d. Email Address: lori.bramble@corporatechefs.com

4. Business Information

- a. Name: Corporate Chefs, LLC
39 Olympia Ave, Suite 2
b. Address: Woburn, MA 01801
c. FEIN #: -
d. Business Phone: (978) 372-7400



TOWN OF CONCORD
Office of the Select Board
Town House
P.O. Box 535
Concord, MA 01742

5. Date License is required by applicant: 12/15/22
6. Do you hold a similar type of license? Yes No
7. Have you previously applied for a license? Yes No
8. Have you ever had a license revoked? If yes, why? Yes No

9. Hours of Operation

<u>Days</u>	<u>Hours</u>	<u>Days</u>	<u>Hours</u>
Monday	<u>7am - 2pm</u> <u>7am - 2pm</u>	Friday	<u>7am - 2pm</u>
Tuesday	<u>7am - 2pm</u>	Saturday	<u>closed</u>
Wednesday	<u>7am - 2pm</u> <u>7am - 2pm</u>	Sunday	<u>closed</u>
Thursday	<u>7am - 2pm</u>		

10. Emergency Contact Information

This section is required. Information provided will be provided to the Concord Police Department to be used to contact a responsible party in the event of an emergency at the licensed premises. If this information changes during the term of license, please contact the Town Manager's Office to update this information.

Emergency Contact #1:

Name: Corporate Chefs/Lori Bramble
Mobile Phone: [REDACTED]

Title: License Admin
Alternate Phone: [REDACTED]

Emergency Contact #2:

Name: Sue Peloquin
Mobile Phone: [REDACTED]

Title: District Manager
Alternate Phone: [REDACTED]



TOWN OF CONCORD
Office of the Select Board
Town House
P.O. Box 535
Concord, MA 01742

I **authorize** that the Concord Police Department to run a criminal record background check (CORI) for any prior offences and that this information may be transmitted to the Local Licensing Authority at their request:

Signature: Lori Bramble Date: 12/15/22

I **certify** under penalties of perjury that I, to the best of my knowledge and belief, have filed all State Tax Returns and paid all State and Local Taxes required by law.

Signature: Lori Bramble Date: 12/15/22

I **certify** that I have read through the conditions included with this license and agree to comply with any further stipulations that the Local Licensing Authority may approve. I also authorize the Local Licensing Authority to conduct any investigation or inquiry necessary to verify the information contained in this application.

Signature: Lori Bramble Date: 12/15/22

-----Office Use Only-----

Application Received: _____ by: _____

Application Complete: _____ Fee Received: _____ Hearing Date: _____

_____ General Liability Insurance Certificate

_____ Workers Compensation Insurance Certificate

_____ MA Department of Revenue Attestation

CLASS II LICENSE ONLY:

_____ Surety Bond

Tax Check: _____ Approved _____ Not Approved

Approved/Denied by the Select Board on _____ by a vote of _____

TOWN OF CONCORD
SELECT BOARD

LICENSE ATTESTATION
REQUIRED BY THE
MASSACHUSETTS DEPARTMENT OF REVENUE

Name:
d/b/a:

I certify under the penalties of perjury that I, to my best knowledge and belief, have filed all state tax returns and paid all state taxes required under law.

Corporate Chefs, LLC

Signature of Individual or
Corporate Name (Mandatory)*

Lori Bramble License Admin

By Corporate Officer
Mandatory, (If applicable)

Print Name of above

Print Name of above

Federal Identification Number

12/15/22

Date

Social Security Number (voluntary)**

* This license will not be issued unless this certification clause is signed by the applicant.

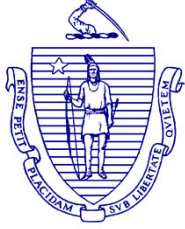
** Your Social Security Number will be furnished to the Massachusetts Department of Revenue to determine whether you have met tax filing or tax payment obligations. Licensees who fail to correct their non-filing or delinquency will be subject to license suspension or revocation. This request is made under the authority of Massachusetts General Law, Chapter 62C, Section 49A. G.

.....

Please provide an e-mail address by which your establishment may be contacted in the event there is information that must be transmitted immediately. **Please print**

E-mail: lori.bramble@corporatechefs.com

Lori Bramble
Name: _____



The Commonwealth of Massachusetts
 Department of Industrial Accidents
 1 Congress Street, Suite 100
 Boston, MA 02114-2017
 www.mass.gov/dia

Workers' Compensation Insurance Affidavit: General Businesses.
 TO BE FILED WITH THE PERMITTING AUTHORITY.

Applicant Information

Please Print Legibly

Business/Organization Name: Corporate Chefs, LLC.

Address: 39 Olympia Avenue, Suite 2

City/State/Zip: Woburn, MA 01801 Phone #: 978-372-7400

Are you an employer? Check the appropriate box:

- 1. I am a employer with 500 employees (full and/or part-time).*
- 2. I am a sole proprietor or partnership and have no employees working for me in any capacity. [No workers' comp. insurance required]
- 3. We are a corporation and its officers have exercised their right of exemption per c. 152, §1(4), and we have no employees. [No workers' comp. insurance required]**
- 4. We are a non-profit organization, staffed by volunteers, with no employees. [No workers' comp. insurance req.]

Business Type (required):

- 5. Retail
- 6. Restaurant/Bar/Eating Establishment
- 7. Office and/or Sales (incl. real estate, auto, etc.)
- 8. Non-profit
- 9. Entertainment
- 10. Manufacturing
- 11. Health Care
- 12. Other _____

*Any applicant that checks box #1 must also fill out the section below showing their workers' compensation policy information.

**If the corporate officers have exempted themselves, but the corporation has other employees, a workers' compensation policy is required and such an organization should check box #1.

I am an employer that is providing workers' compensation insurance for my employees. Below is the policy information.

Insurance Company Name: SENTRY INSURANCE COMPANY

Insurer's Address: 1800 NORTH POINT DRIVE

City/State/Zip: STEVENS POINT, WI 54481

Policy # or Self-ins. Lic. # 9018840001 Expiration Date: 09/01/2023

Attach a copy of the workers' compensation policy declaration page (showing the policy number and expiration date).

Failure to secure coverage as required under Section 25A of MGL c. 152 can lead to the imposition of criminal penalties of a fine up to \$1,500.00 and/or one-year imprisonment, as well as civil penalties in the form of a STOP WORK ORDER and a fine of up to \$250.00 a day against the violator. Be advised that a copy of this statement may be forwarded to the Office of Investigations of the DIA for insurance coverage verification.

I do hereby certify, under the pains and penalties of perjury that the information provided above is true and correct.

Signature: Levi Bramble Date: _____

Phone #: 978-372-7400

Official use only. Do not write in this area, to be completed by city or town official.

City or Town: _____ Permit/License # _____

Issuing Authority (circle one):

- 1. Board of Health
- 2. Building Department
- 3. City/Town Clerk
- 4. Licensing Board
- 5. Selectmen's Office
- 6. Other _____

Contact Person: _____ Phone #: _____

Information and Instructions

Massachusetts General Laws chapter 152 requires all employers to provide workers' compensation for their employees. Pursuant to this statute, an *employee* is defined as "...every person in the service of another under any contract of hire, express or implied, oral or written."

An *employer* is defined as "an individual, partnership, association, corporation or other legal entity, or any two or more of the foregoing engaged in a joint enterprise, and including the legal representatives of a deceased employer, or the receiver or trustee of an individual, partnership, association or other legal entity, employing employees. However, the owner of a dwelling house having not more than three apartments and who resides therein, or the occupant of the dwelling house of another who employs persons to do maintenance, construction or repair work on such dwelling house or on the grounds or building appurtenant thereto shall not because of such employment be deemed to be an employer."

MGL chapter 152, §25C(6) also states that "**every state or local licensing agency shall withhold the issuance or renewal of a license or permit to operate a business or to construct buildings in the commonwealth for any applicant who has not produced acceptable evidence of compliance with the insurance coverage required.**"

Additionally, MGL chapter 152, §25C(7) states "Neither the commonwealth nor any of its political subdivisions shall enter into any contract for the performance of public work until acceptable evidence of compliance with the insurance requirements of this chapter have been presented to the contracting authority."

Applicants

Please fill out the workers' compensation affidavit completely, by checking the boxes that apply to your situation and, if necessary, supply your insurance company's name, address and phone number along with a certificate of insurance. Limited Liability Companies (LLC) or Limited Liability Partnerships (LLP) with no employees other than the members or partners, are not required to carry workers' compensation insurance. If an LLC or LLP does have employees, a policy is required. Be advised that this affidavit may be submitted to the Department of Industrial Accidents for confirmation of insurance coverage. **Also be sure to sign and date the affidavit.** The affidavit should be returned to the city or town that the application for the permit or license is being requested, **not** the Department of Industrial Accidents. Should you have any questions regarding the law or if you are required to obtain a workers' compensation policy, please call the Department at the number listed below. Self-insured companies should enter their self-insurance license number on the appropriate line.

City or Town Officials

Please be sure that the affidavit is complete and printed legibly. The Department has provided a space at the bottom of the affidavit for you to fill out in the event the Office of Investigations has to contact you regarding the applicant. Please be sure to fill in the permit/license number which will be used as a reference number. In addition, an applicant that must submit multiple permit/license applications in any given year, need only submit one affidavit indicating current policy information (if necessary). A copy of the affidavit that has been officially stamped or marked by the city or town may be provided to the applicant as proof that a valid affidavit is on file for future permits or licenses. A new affidavit must be filled out each year. Where a home owner or citizen is obtaining a license or permit not related to any business or commercial venture (i.e. a dog license or permit to burn leaves etc.) said person is NOT required to complete this affidavit.

The Department's address, telephone and fax number:

The Commonwealth of Massachusetts
Department of Industrial Accidents
1 Congress Street
Boston, MA 02114-2017
Tel. # 617-727-4900 ext. 7406 or 1-877-MASSAFE
Fax # 617-727-7749
www.mass.gov/dia

NOTICE
TO
EMPLOYEES



NOTICE
TO
EMPLOYEES

The Commonwealth of Massachusetts

DEPARTMENT OF INDUSTRIAL ACCIDENTS

LAFAYETTE CITY CENTER, 2 AVENUE DE LAFAYETTE, BOSTON, MA 02111
(617) 727-4900 – www.mass.gov/dia

As required by Massachusetts General Law, Chapter 152, Sections 21, 22 & 30, this will give you notice that I (we) have provided for payment to our injured employees under the above-mentioned chapter by insuring with:

SENTRY INSURANCE COMPANY

NAME OF INSURANCE COMPANY

1800 North Point Drive, Stevens Point, WI 54481

ADDRESS OF INSURANCE COMPANY

9018840001

09/01/2022-09/01/2023

POLICY NUMBER

EFFECTIVE DATES

HAYS COMPANIES

80 S. 8TH STREET, SUITE 700

612-333-3323

NAME OF INSURANCE AGENT

ADDRESS

PHONE #

ELIOR INC DBA ELIOR NORTH AMERICA

300 S TRYON ST STE 400 CHARLOTTE NC 28202

EMPLOYER

ADDRESS

EMPLOYER'S WORKERS' COMPENSATION OFFICER (IF ANY)

DATE

MEDICAL TREATMENT

The above named insurer is required in cases of personal injuries arising out of and in the course of employment to furnish adequate and reasonable hospital and medical services in accordance with the provisions of the Workers' Compensation Act. A copy of the First Report of Injury must be given to the injured employee. The employee may select his or her own physician. The reasonable cost of the services provided by the treating physician will be paid by the insurer, if the treatment is necessary and reasonably connected to the work related injury. In cases requiring hospital attention, employees are hereby notified that the insurer has arranged for such attention at the

NAME OF HOSPITAL

ADDRESS

TO BE POSTED BY EMPLOYER



POLICY NUMBER: 9018840001

WORKERS COMPENSATION AND EMPLOYERS LIABILITY INSURANCE POLICY INFORMATION PAGE

<p>Sentry Insurance Company (A Participating Stock Company) A member of the Sentry Insurance Group 1800 North Point Drive Stevens Point, WI 54481</p>	<p>Carrier Code No 15571 Policy Number 9018840001 Renewal of Policy Number 9018840001 Hays Companies IDS Center Ste 700 80 S 8th St Minneapolis, MN 55402 Agency Code 1068446 612-333-3323</p>
---	--

IMPORTANT NOTICES

Kansas Important Notice - Accident Prevention Services

We are required by law to notify our policyholders that accident prevention services are required by KS ST 44-5, 104 are available. If you would like more information, call 1-800-443-9655.

Michigan Important Notice - Filing Exemption

This policy is exempt from the filing requirements of MCL 500.2236.

Pennsylvania Important Notice – Accident Prevention Services

We are required by 34 Pa. Code § 129.102 to provide our policyholders with accident and illness prevention services. If you would like more information, call 1-800-443-9655. The Pennsylvania Workers' Compensation Act provides an option for you to apply for a 5% premium discount if you form a certified workplace safety committee. Please contact your Sentry Representative for more information.

IMPORTANT NOTICES

Texas Important Notice - Accident Prevention Services

Pursuant to Texas Labor Code §411.066, Sentry Insurance is required to notify its policyholders that accident prevention services are available from Sentry Insurance at no additional charge. These services may include surveys, recommendations, training programs, consultations, analyses of accident causes, industrial hygiene, and industrial health services. Sentry Insurance is also required to provide return-to-work coordination services as required by Texas Labor Code §413.021 and to notify you of the availability of the return-to-work reimbursement program for employers under Texas Labor Code §413.022. If you would like more information, contact the Sentry Insurance Safety Services Department at 1-800-443-9655 and sentryse@sentry.com for accident prevention services, or Sentry Insurance Claims Department at 1-800-739-3344 and claimsmail@sentry.com for return-to-work coordination services. For information about these requirements call the Texas Department of Insurance, Division of Workers' Compensation (TDI-DWC) at 1-800-687-7080 or for information about the return-to-work reimbursement program for employers call the TDI-DWC at 512-804-5000. If Sentry Insurance fails to respond to your request for accident prevention services or return-to-work coordination services, you may file a complaint with the TDI-DWC in writing at <http://www.tdi.texas.gov> or by mail to Texas Department of Insurance, Division of Workers' Compensation, MS-8, at 7551 Metro Center Drive, Austin, Texas 78744-1645.

Oklahoma Important Notice - Workplace Safety Services

We are required by law to notify our policyholders that workplace safety services are available as required by 36 O.S. 6701. If you would like more information, call 1-800-443-9655.

Colorado Important Notice - Risk Management Services

We are required by CO ADC 705:5-3-1 to provide risk management services. If you would like more information, call 1-800-443-9655.

THIS POLICY IS NON-ASSESSABLE.

ITEM

1. INSURED

First Named Insured: Elior Inc DBA Elior North America
Address: 300 S Tryon St Ste 400
Charlotte, NC 28202-0136
Phone Number: 704-424-1071
Business Description: Corporation

See Schedule of Entities for Other Insured Entities

Other workplaces not shown above:
See Extension of information page

2. POLICY PERIOD

The policy period is from 09/01/2022 to 09/01/2023 at 12:01A.M, Standard Time at the First Named Insured's mailing address shown above.

3. COVERAGE

A. Workers Compensation Insurance: Part One of the policy applies to the workers compensation law of the states listed here:

- | | | |
|-------------|----------------------|----------|
| Alaska | Alabama | Arkansas |
| Arizona | California | Colorado |
| Connecticut | District of Columbia | Delaware |

3. COVERAGE

Florida	Georgia	Iowa
Idaho	Illinois	Indiana
Kansas	Kentucky	Louisiana
Massachusetts	Maryland	Maine
Michigan	Minnesota	Missouri
Mississippi	Montana	North Carolina
Nebraska	New Hampshire	New Jersey
New Mexico	Nevada	New York
Oklahoma	Pennsylvania	Rhode Island
South Carolina	South Dakota	Tennessee
Texas	Utah	Virginia
Vermont	West Virginia	

B. Employers Liability Insurance: Part Two of the policy applies to work in each state listed in Item 3.A. The limits of our liability under Part Two are:

Bodily Injury by Accident	\$ 1,000,000	Each accident
Bodily Injury by Disease	\$ 1,000,000	Each employee
Bodily Injury by Disease	\$ 1,000,000	Policy limit

C. Other States Insurance: Part Three of the policy applies in all states except those listed in Item 3.A., and the following:
 ND OH OR WA WI
 WY

D. This policy includes these Endorsements and Schedules:

Form/Endorsement Number and Edition Date	Form/Endorsement Title
WC 00 00 00 C 01 15	Workers Compensation And Employers Liability Insurance Policy
WC 00 01 04 A 10 04	Federal Employers' Liability Act Coverage Endorsement
WC 00 01 06 A 04 92	Longshore And Harbor Workers' Compensation Act Coverage Endorsement
WC 00 02 01 B 01 15	Maritime Coverage Endorsement
WC 00 03 11 A 08 91	Voluntary Compensation And Employers Liability Coverage Endorsement
WC 00 03 13 04 84	Waiver Of Our Right To Recover From Others Endorsement
WC 00 04 03 04 84	Experience Rating Modification Factor Endorsement
WC 00 04 06 08 84	Premium Discount Endorsement
WC 00 04 06 A 07 95	Premium Discount Endorsement
WC 00 04 08 04 84	Longshore And Harbor Workers' Compensation Act Rate Change Endorsement
WC 00 04 14 07 90	Notification Of Change In Ownership Endorsement
WC 00 04 14 A 01 19	90-Day Reporting Requirement - Notification Of Change In Ownership Endorsement
WC 00 04 19 01 01	Premium Due Date Endorsement
WC 00 04 19 A 08 22	Premium Amendatory Endorsement
WC 00 04 21 E 01 21	Catastrophe (Other Than Certified Acts Of Terrorism) Premium Endorsement
WC 00 04 21 F 08 22	Catastrophe (Other Than Certified Acts Of Terrorism) Premium Endorsement

3. COVERAGE

Form/Endorsement Number and Edition Date	Form/Endorsement Title
WC 00 04 21 F 07 22	Catastrophe (Other Than Certified Acts Of Terrorism) Premium Endorsement
WC 00 04 22 C 01 21	Terrorism Risk Insurance Program Reauthorization Act Disclosure Endorsement
WC 00 04 24 01 17	Audit Noncompliance Charge Endorsement
WC 00 04 25 05 17	Experience Rating Modification Factor Revision Endorsement
WC 02 06 01 C 09 21	Arizona Cancellation And Nonrenewal Endorsement
WC 02 06 03 01 21	Arizona Amendatory Endorsement
WC 03 06 01 B 03 18	Arkansas Amendatory Endorsement
WC 04 03 01 B 01 12	Policy Amendatory Endorsement-California
WC 04 03 60 A 11 99	Employers' Liability Coverage Amendatory Endorsement - California
WC 04 04 21 01 08	Optional Premium Increase Endorsement - California
WC 04 06 01 A 12 93	California Cancelation Endorsement
WC 04 06 03 A 01 07	California Large Risk Deductible Endorsement
WC 04 06 04 09 20	Covid-19 Reporting Requirement Endorsement - California
WC 05 04 02 11 90	Colorado Classification Endorsement
WC 05 04 03 03 93	Colorado Premium Credit For Certified Risk Management Programs Endorsement
WC 06 03 01 04 84	Connecticut Application Of Workers Compensation Insurance Endorsement
WC 06 03 03 C 07 11	Connecticut Workers Compensation Funds Endorsement
WC 06 06 01 A 10 17	Connecticut Nonrenewal And Renewal Endorsement
WC 07 06 01 07 88	Delaware Nonrenewal Endorsement
WC 08 06 01 04 84	District Of Columbia Cancelation Endorsement
WC 09 03 03 08 05	Florida Employers Liability Coverage Endorsement
WC 09 04 02 A 05 17	Florida Experience Rating Modification Factor Endorsement
WC 09 04 03 C 01 21	Florida Terrorism Risk Insurance Program Reauthorization Act Endorsement
WC 09 04 06 A 07 15	Florida Foreign Voluntary Compensation And Employers Liability Coverage Endorsement
WC 09 04 07 07 13	Florida Non-Cooperation With Premium Audit Endorsement
WC 09 06 06 10 98	Florida Employment And Wage Information Release Endorsement
WC 09 06 07 A 07 18	Florida Workers Compensation Insurance Guaranty Association Surcharge Endorsement
WC 10 06 01 C 07 18	Georgia Cancellation, Nonrenewal, And Change Endorsement
WC 12 03 06 A 07 11	Illinois Workers Compensation And Employers Liability Insurance Policy Exclusion Endorsement
WC 12 06 01 F 01 19	Illinois Amendatory Endorsement
WC 12 06 03 01 19	Illinois Renewal Endorsement
WC 15 04 01A 01 10	Kansas Final Premium Endorsement
WC 15 06 01A 01 87	Kansas Cancelation And Nonrenewal Endorsement
WC 16 03 05 06 07	Kentucky Part One Workers Compensation Insurance Endorsement
WC 16 06 01 12 97	Kentucky Cancellation And Nonrenewal Endorsement
WC 16 06 02 10 99	Kentucky Notice Of Appeal Rights Endorsement
WC 17 06 01 J 08 18	Louisiana Amendatory Endorsement
WC 17 06 02A 02 96	Louisiana Cost Containment Act Endorsement
WC 18 06 01 04 84	Maine Inspection Immunity Endorsement
WC 18 06 03 A 06 95	Maine Cancelation And Nonrenewal Endorsement
WC 18 06 04 05 88	Maine Final Premium Audit Endorsement

3. COVERAGE

Form/Endorsement Number and Edition Date	Form/Endorsement Title
WC 18 06 06 08 99	Maine Notice Of Filing Of First Reports Of Injury Within Seven Days Endorsement
WC 18 06 07 A 07 11	Maine Supplemental Benefits Fund Endorsement
WC 19 06 01G 10 17	Maryland Cancellation And Nonrenewal Endorsement
WC 19 06 02 01 14	Maryland Notification Of 45-Day Underwriting Period Endorsement
WC 20 03 01 04 84	Massachusetts Limits Of Liability Endorsement
WC 20 03 02 A 09 08	Massachusetts - Assessment Charge
WC 20 03 03 D 08 10	Massachusetts Notice To Policyholder Endorsement
WC 20 04 03 01 91	Massachusetts Construction Classification Premium Adjustment Endorsement
WC 20 04 05 06 01	Massachusetts Premium Due Date Endorsement
WC 20 06 01 A 07 08	Massachusetts Cancellation Endorsement
WC 21 03 03 A 06 97	Michigan Notice To Policyholder Endorsement
WC 21 03 04 04 84	Michigan Law Endorsement
WC 21 04 02 C 01 21	Michigan Terrorism Risk Insurance Program Reauthorization Act Disclosure Endorsement
WC 22 00 00 A 11 03	Minnesota Amendatory Endorsement
WC 22 06 01 D 08 06	Minnesota Cancellation And Nonrenewal Endorsement
WC 23 06 01 07 18	Mississippi Cancellation, Nonrenewal, And Renewal Endorsement
WC 24 03 02 01 14	Missouri Notification Of Additional Mesothelioma Benefits Endorsement
WC 24 04 01 01 90	Missouri Contracting Classification Premium Adjustment Endorsement
WC 24 04 06 D 08 16	Missouri Employer Paid Medical Endorsement
WC 24 06 01 B 01 96	Missouri Cancellation And Nonrenewal Endorsement
WC 24 06 02 B 07 06	Missouri Property And Casualty Guaranty Association Notification Endorsement
WC 24 06 04 C 09 19	Missouri Amendatory Endorsement
WC 25 03 05 07 02	Montana Intentional Injury Exclusion Endorsement
WC 25 04 01 A 01 17	Montana Audit Noncompliance Charge Endorsement
WC 25 06 01 B 04 16	Montana Amendatory Endorsement
WC 25 06 02 03 95	Montana Safety Endorsement
WC 26 06 01 C 07 96	Nebraska Cancellation And Nonrenewal Endorsement
WC 27 06 01C 10 08	Nevada Cancellation And Nonrenewal Endorsement
WC 28 04 05 09 20	New Hampshire Audit Noncompliance Charge Endorsement
WC 28 06 01 04 84	New Hampshire Sole Representative Endorsement
WC 28 06 04 04 92	New Hampshire Amendatory Endorsement
WC 29 03 06 B 07 07	New Jersey Part Two Limit Of Liability Endorsement
WC 29 06 01 A 01 94	New Jersey Large Risk - Large Deductible Endorsement
WC 29 06 03 01 98	New Jersey Participating Provision Endorsement
WC 30 06 01A 03 15	New Mexico Cancellation And Nonrenewal Endorsement
WC 31 03 08 01 00	New York Limit Of Liability Endorsement
WC 31 03 19 L 01 22	New York Construction Classification Premium Adjustment Program Explanatory Endorsement
WC 31 06 17 B 05 20	New York Foreign Voluntary Compensation And Employers Liability Coverage Endorsement
WC 31 06 18 A 05 20	New York Workers Compensation Policyholder Notice Of Right To Appeal
WC 32 03 01 D 07 18	North Carolina Amended Coverage Endorsement

3. COVERAGE

Form/Endorsement Number and Edition Date	Form/Endorsement Title
WC 35 03 03 03 11	Oklahoma Employers Liability Intentional Tort Exclusion Endorsement
WC 35 06 01 F 02 14	Oklahoma Cancellation, Nonrenewal And Change Endorsement
WC 35 06 03 12 93	Oklahoma Fraud Warning Endorsement
WC 37 04 01 01 17	Pennsylvania Audit Noncompliance Charge Endorsement
WC 37 06 01 04 84	Special Pennsylvania Endorsement Inspection Of Manuals
WC 37 06 02 04 84	Pennsylvania Notice
WC 37 06 03 A 08 95	Pennsylvania Act 86-1986 Endorsement
WC 37 06 04 10 99	Pennsylvania Employer Assessment Endorsement
WC 38 04 01 B 01 15	Rhode Island Short Rate Cancellation Endorsement
WC 38 06 01 04 84	Rhode Island Direct Liability Statute Endorsement
WC 38 06 02 06 93	Rhode Island Safety Inspection Endorsement
WC 39 06 01 09 21	South Carolina Cancellation And Nonrenewal Endorsement
WC 40 06 01 A 07 11	South Dakota Direct Action Statute Endorsement
WC 40 06 03 01 94	South Dakota Managed Care Endorsement
WC 40 06 05 B 04 06	South Dakota Cancellation And Nonrenewal Endorsement
WC 42 03 01 J 06 20	Texas Amendatory Endorsement
WC 42 03 04 B 06 14	Texas Waiver Of Our Right To Recover From Others Endorsement
WC 42 04 07 03 02	Texas - Audit Premium And Retrospective Premium Endorsement
WC 42 04 08 A 06 14	Texas Health Care Network Endorsement
WC 43 03 05 07 00	Utah Waiver Of Subrogation Endorsement
WC 43 06 01 01 93	Utah Workplace Safety Program Endorsement
WC 43 06 02 07 02	Utah Cancellation Endorsement
WC 44 06 01 04 84	Vermont Law Endorsement
WC 44 06 02 C 01 21	Vermont Cancellation And Nonrenewal Endorsement
WC 45 06 02 07 93	Virginia Amendatory Endorsement
WC 47 03 01A 07 08	West Virginia Employers Liability Insurance Intentional Act Exclusion Endorsement
WC 47 03 02 07 08	West Virginia Workers Compensation Insurance Recovery From Others Endorsment
WC 47 06 01 07 08	West Virginia Cancellation Endorsement
WC 54 03 01 04 95	Alaska Limit Of Liability Endorsement
WC 54 06 01 A 01 13	Alaska Notice Of Installment Option Endorsement
WC 54 06 02 04 95	Alaska Cancelation And Nonrenewal Endorsement
WC 90 06 01 12 01	Amendatory Endorsement
WC 90 06 03 12 01	Large Deductible Attachment Clause
WC 90 06 05 01 02	California Amended Cancellation Conditions
WC 90 06 06 05 02	Florida Amendatory Endorsement
WC 99 00 52 07 12	Foreign Voluntary Compensation And Employers Liability Coverage Endorsement
WC 99 02 01 01 05	Large Deductible Amendatory Endorsement Arizona Special Provisions
WC 99 06 01 04 91	Large Deductible Endorsement
WC 99 06 03 12 91	Arkansas Special Provisions
WC 99 06 05 05 92	Virginia Special Provisions
WC 99 06 11 05 93	Nebraska Special Provisions
WC 99 06 23 01 21	Additional Conditions Membership Participation

3. COVERAGE

Form/Endorsement Number and Edition Date	Form/Endorsement Title
WC 99 06 62 01 96	Large Deductible Endorsement (Including Allocated Loss Adjustment Expense)
WC 99 06 64 01 96	Large Deductible Endorsement (Including Allocated Loss Adjustment Expense)
WC 99 06 70 01 99	Foreign Coverage Endorsement
WC 99 06 72 09 11	Notice Of Cancellation - Certificate Holders Workers Compensation
WC 99 32 01 05 97	Large Deductible Amendatory Endorsement North Carolina Special Provisions
WC 99 35 01 01 05	Large Deductible Amendatory Endorsement Oklahoma Special Provisions
WC 99 41 02 06 08	Large Deductible Amendatory Endorsement - Tennessee Special Provisions
WC 99 44 01 11 96	Large Deductible Amendatory Endorsement - Vermont Special Provisions
WC 99 54 64 06 97	Alaska Loss Reimbursement Endorsement (Including Allocated Loss Adjustment Expense)

12/15/2022

MEMORANDUM

Date: December 19, 2022
To: Concord Select Board
From: Rose Cratsley & Josh Lee (DEI Co-Chairs)
Subject: Diversity, Equity and Inclusion in Support of Select Board 2022-2023 Goals

The Concord Select Board annually affirms its **values and guiding principles** to align its goals and objectives for improving government as it interacts with the Town Manager, committees, task forces, citizens, and other units of government. In so doing, the **Board aims to lead** and establish strategic priorities, to provide support and guidance and encouragement where appropriate and to be collaborative, open, and inclusive at all times.

Specifically, the Board supports short- and long-term goals and objectives in the following categories as related to Diversity, Equity and Inclusion in its Select Board 2022-2023 Goals:

C. Diversity, Equity, Inclusion, and Belonging – Support economic, social, racial, and cultural diversity and inclusion. Generate more affordable housing and reduce barriers faced by lower income residents. Balance divergent individual, neighborhood, and town-wide interests.

1. Conduct the biannual Town-wide survey with a special focus on diversity, equity, and inclusion topics.
2. Conduct diversity, equity, and inclusion training sessions for the Select Board.
3. **[Priority] Work with the DEI Commission to research and implement diversity, equity, and inclusion best practices in town governance. Listen to diverse voices in the community and assess which additional DEI actions the Select Board should take.**
4. Provide input to the housing production plan update to maximize the equity and diversity impacts of future affordable housing initiatives. Review and adopt the completed plan.
5. **[Priority]** Evaluate whether to implement the residential exemption to reduce the real estate tax burden of less affluent homeowners.
6. Submit a 2023 ATM warrant appropriation article for affordable housing if the related special legislation or equivalent state-wide funding program has not been approved.

In support of Priority area 3 the DEI Commission was established, and the following summarizes preliminary recommendations from this Commission on advancing improved Diversity, Equity and Inclusion in the Town of Concord. These recommendations are based on recent months of Commission meetings with town citizens, discussions with other New England towns similar to Concord, and best practices research.

Description	Recommendation	Proposed Timing
Complete community needs assessment	Survey. Complete current DEI survey and publish report on findings. Repeat survey on a biannual basis.	Q1 2023 (biannually)
	Stakeholder interviews and small group conversations. The primary purpose of these interviews and focus groups is to obtain DEI strategic status and goals-relevant information and elicit stakeholder reactions and suggestions. The “stakeholders” are the people within the town who are involved in the execution of the DEI planned activities or people who will be affected by the strategic direction of the plan.	Q1 2023
Roadmap	Develop a data driven and informed DEI three-year plan that includes the community's goals, strategies, policies, and specific programs to be designed and developed during the three-year period, for improving the delivery of services through a DEI lens.	Q2 2023
Budget	Work with the town to secure appropriate funding in support of the DEI roadmap.	Q2-Q4 2023
Full-time DEI Staff	The town should hire a full-time DEI staff person (e.g., Director) to coordinate and lead multiple DEI initiatives.	Q4 2023
Incident reporting system	Put in place two bias reporting systems (modeled after Belmont system). One system for schools, and a second for the town overall.	Q1 2023
Implementation team	Establish appropriate teams of staff and volunteers to implement initiatives in the key areas of the roadmap.	Q4 2023
Audits	Build on recent DEI Audits and complete and/or deepen Audits in key areas of town staff and community institutions.	Q2 2023
Training	Based on findings from Audits, conduct targeted permanent, continuous, and mandatory training programs to town staff to increase DEI skills.	Q3-Q4 2023

Liaisons	Establish accountable staff roles to coordinate between the Commission and other key groups and organizations in town (e.g., schools, affordable housing, public safety, chamber of commerce)	Q2 2023
Climate and Culture	Create new and innovative opportunities to honor, celebrate and recognize diversity and inclusion through hosting and celebrating events, activities, and programs throughout the community.	2023

TOWN OF CONCORD

HOUSING PRODUCTION PLAN

FY2023-2028

FINAL FOR ADOPTION

REVISED 12/9/22

PREPARED FOR:

Town of Concord

22 Monument Square

Concord, MA 01742

PREPARED BY:

JM Goldson LL

Regional Housing Services Office

Town of Concord Department of Planning and Land Management

This page intentionally left blank.

TABLE OF CONTENTS

ACKNOWLEDGMENTS	5
ACRONYMS	6
KEY DEFINITIONS	8
DATA SOURCES	10
Chapter 1: Introduction	11
REPORT ORGANIZATION	13
COMMUNITY OVERVIEW	13
EXECUTIVE SUMMARY OF KEY FINDINGS	14
Chapter 2: Housing Goals and Strategies	20
KEY FINDINGS	20
FIVE-YEAR GOALS	20
FIVE-YEAR STRATEGIES	27
ACTION PLAN	58
Chapter 3: Demographic Profile	66
KEY FINDINGS	66
DEMOGRAPHICS	67
HOUSEHOLDS	72
EDUCATION	77
ECONOMIC CHARACTERISTICS	80
SUMMARY	82
Chapter 4: Housing Conditions	83
KEY FINDINGS	83
HOUSING SUPPLY AND TRENDS	84
RECENT AND FUTURE DEVELOPMENT	92
HOUSING AFFORDABILITY	94
SUMMARY	103
Chapter 5: Development Constraints	105
KEY FINDINGS	105

ENVIRONMENTAL CONSTRAINTS	106
INFRASTRUCTURE CAPACITY	115
REGULATORY BARRIERS AND CONSIDERATIONS	118
Chapter 6: Implementation Capacity and Resources	124
<hr/>	
KEY FINDINGS	124
LOCAL CAPACITY AND RESOURCES	125
Appendices	131
<hr/>	
CONCORD SUBSIDIZED HOUSING INVENTORY	131
DHCD AFFIRMATIVE FAIR HOUSING GUIDELINES	134
INTERAGENCY BEDROOM MIX POLICY	135
COMPREHENSIVE PERMIT DENIAL AND APPEAL PROCEDURES	137
LEAGUE OF WOMEN VOTERS HOUSING SITES	138
LEAGUE OF WOMEN VOTERS CREATIVE THINKING IDEAS	143

ACKNOWLEDGMENTS

Housing Production Plan Steering Committee

Stephan Bader
Keith Bergman
Michael Lawson
Lee Smith
Moira Walsh

Select Board

Matthew Johnson, Chair
Terri Ackerman, Clerk
Linda Escobedo*
Henry Dane
Mary Hartman

Planning Board

Nathan Bosdet (Chair)
Haley Orvedal (Vice-Chair)
Mark Giddings
Andrew Boardman
Sue Felshin
Linda Miller*

Concord Municipal Affordable Housing Trust

Keith Bergman, Chair*
Linda Escobedo, Vice Chair

Michael Lawson, Clerk
Frank "Rich" Feeley
Kerry Lafleur, Town Manager

Concord Housing Development Corporation

Lee Smith, Chair*
Douglas Bacon
Peter Lowitt, Vice Chair
Dan Drazen

Regional Housing Services Office Staff

Elizabeth Rust
Lara Plaskon

Town Staff

Marcia Rasmussen, Director of Planning and Land Management
Elizabeth Hughes, Town Planner
Heather Carey, Administrative Assistant

With the assistance of planning consultants:

Jennifer M. Goldson, AICP, JM Goldson
Laura Smead, AICP, JM Goldson

ACRONYMS

ACS	US Census Bureau’s American Community Survey, Five-Year Estimates
ADA	Americans with Disabilities Act
ADU	Accessory Dwelling Unit
AHFC	Affordable Housing Funding Committee
AMI/AMFI	Area Median Family Income set by HUD (household of four)
ARPA	American Rescue Plan Act
ASAP	Aging Service Access Points
BIPOC	Black, Indigenous, People of Color
CEDAC	Community Economic Development Assistance Corporation
CHA	Concord Housing Authority
CHAPA	Citizens Housing and Planning Association
CHAS	Comprehensive Housing Affordability Strategy
CHDC	Concord Housing Development Corporation
CHF	Concord Housing Foundation
CMAHT	Concord Municipal Affordable Housing Trust
CPA	State of Massachusetts Community Preservation Act (MGL Chapter 44B)
CPC	Community Preservation Committee
CPTC	Citizen Planner Training Collaborative
DEI	Diversity, Equity, and Inclusion
DEP	Massachusetts Department of Environmental Protection
DDS	Massachusetts Department of Developmental Services
DHCD	Massachusetts Department of Housing and Community Development
EOEA	Executive Office of Elder Affairs
EPA	U.S. Environmental Protection Agency
FAR	Floor Area Ratio
FEMA	Federal Emergency Management Agency
FHAct	Federal Fair Housing Act
FY	Fiscal Years (July 1-June 30)
GHG	Greenhouse Gas
HAC	Housing Appeals Committee
HOME	HOME Investments Partnerships Program
HPP	Housing Production Plan
HUD	United States Department of Housing and Urban Development
LOHA	Local Option for Housing Affordability Coalition
LMI	Low/Moderate- Income (at or below 80 percent AMI)
MACRIS	Massachusetts Cultural Resources Information System
MAPC	Metropolitan Area Planning Council

MassDOT	Massachusetts Department of Transportation
MassGIS	Massachusetts Bureau of Geographic Information
MBTA	Massachusetts Bay Transportation Authority
MCI	Massachusetts Correctional Institution
MGL	Massachusetts General Laws
MLS	Multiple Listings Service (central real estate database)
MSA	Metropolitan Statistical Area
NECC	Northeastern Correctional Center
NESDC	New England School Development Council
NHESP	Massachusetts Natural Heritage and Endangered Species Program
NRC	Natural Resources Commission
PRD	Planned Residential Development
RFP	Request for Proposal
RHSO	Regional Housing Services Office
SHI	Massachusetts Subsidized Housing Inventory
TBD	Thoreau Depot Business District
WWTP	Waste Water Treatment Plant
YTD	Year to Date
ZBA	Zoning Board of Appeals
40B	Comprehensive Permit, per MGL Chapter 40B, §20-23

KEY DEFINITIONS

This list of key definitions is intended to assist the reader and is not intended to replace applicable legal definitions of these terms. The following definitions are for key terms used throughout the document, many of which are based on definitions in statutes and regulations.

Affordable Housing – Affordable Housing – Housing targeted to and affordable by households that meet specific income eligibility levels, typically households earning below 80% of the metropolitan area’s median income (or AMI). “Affordable housing” does not refer to the design, type, or method of construction of a housing unit or development, but to the cost of the housing to the consumer. Housing is generally considered affordable if the household pays less than 30 percent of its monthly income to secure the housing.

Area Median Income (AMI)– the median gross income for a person or family as calculated by the United States Department of Housing and Urban Development, based on the median income for the Metropolitan Statistical Area. For FY2022, the HUD area median family income (AMFI) for the Boston-Cambridge-Newton MA HUD Metro FMR Area (which includes Concord) is \$140,200.¹ AMI is also referred to in the document as median family income (AMFI). A household's income must be less than the 80 percent area median income, to be eligible for inclusion on the SHI or in affordable housing programs.

Community Housing – "Community housing", low and moderate income housing for individuals and families, including low or moderate income senior housing.
(Masslegis.tu.gov)

Cost-Burdened Household – a household that spends 30 percent or more of its income on housing-related costs (such as rent or mortgage payments). Severely cost-burdened households spend 50 percent or more of their income on housing-related costs.

Extremely Low-Income (ELI) – the FY 2014 Consolidated Appropriations Act changed the definition of extremely low-income to an individual or family whose annual gross income is at or below the greater of 30/50ths (60 percent) of the Section 8 very low-income limit or the poverty guideline. The FY2022 ELI income limits for a household of one is \$29,450 and for a household of four is \$42,050 (the 30% AMI limits).

¹ U.S. Department of Housing and Urban Development. FY 2021 Income Limits Summary.
<https://www.huduser.gov/portal/datasets/il/il2021/2021summary.odn> (accessed August 2021).

Family Household – Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people.

Household – all the people, related or unrelated, who occupy a housing unit. It can also include a person living alone in a housing unit or a group of unrelated people sharing a housing unit as partners or roommates. Family households consist of two or more individuals who are related by birth, marriage, or adoption, although they also may include other unrelated people. Nonfamily households consist of people who live alone or who share their residence with unrelated individuals.

Income Thresholds – the U.S. Department of Housing and Urban Development (HUD) establishes income thresholds that apply to various housing assistance programs. These thresholds are updated annually and are categorized by household size. Concord is part of the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area.

Labor Force – all residents within a community over the age of 16 who are currently employed or *actively* seeking employment. It does not include students, retirees, discouraged workers (residents who are not actively seeking a job) or those who cannot work due to a disability.

Low/Moderate income (LMI) – an individual or family whose annual gross income at or below 80 percent of the area median income (AMI).² The FY2022 LMI income limits for a household of one is \$78,300 and for a household of four is \$111,850.

Open Space – land to protect existing and future well fields, aquifers and recharge areas, watershed land, agricultural land, grasslands, fields, forest land, fresh and saltwater marshes and other wetlands, oceans, rivers, streams, lake and pond frontage, beaches, dunes and other coastal lands, lands to protect scenic vistas, land for wildlife or nature preserve, and/or land for recreational use.

Non-Family Households – Non-family households consist of individuals living alone and individuals living with others who are not related by birth, marriage, or adoption.

Subsidized Housing Inventory – The Subsidized Housing Inventory (SHI) is the official measure a community's stock of low-or moderate-income housing for the purposes of Chapter 40B. While housing developed under Chapter 40B is eligible for inclusion on the SHI, many

² For purposes of MGL c.40B, low/moderate income is defined as up to 80 percent AMI.

other types of housing also qualify to count toward a community's affordable housing stock. Concord currently stands at 10.43%.

Very Low-Income (VLI) – an individual or family whose annual gross income is at or below 50 percent AMI. The FY2022 VLI income limits for a household of one is \$49,100 and for a household of four is \$70,100, for the Boston MSA.

DATA SOURCES

This plan utilizes data from 19 sources including the 2000, 2010, & 2020 Decennial Census; 2020 American Community Survey; Warren Group Town Stats; US Census Annual Building Permit Survey; DHCD; Comprehensive Housing Affordability Strategy (CHAS); Local MLS data, Trulia.com, Zillow.com, Concord Housing Authority, Concord/Carlisle School Committee; MA Department of Elementary and Secondary Education (DESE); HUD; Mass Housing Partnership's DataTown; New England School Development Council; the MA Department of Corrections as well as staff and committee knowledge and data.

The U.S. Census counts every resident in the United States by asking ten questions, whereas the ACS provides estimates based on a sample of the population for more detailed information. It is important to be aware that there are margins of error (MOE) attached to the ACS estimates, because the estimates are based on samples and not on complete counts.

Data collection and analysis was performed during Summer of 2022, and Chapters 3 and 4 (Demographics and Housing Conditions) sections reflect the latest data available at that time, including the full 2020 Decennial Census information which is not currently available.

CHAPTER 1: INTRODUCTION

A Housing Production Plan (HPP), defined in regulations at 760 CMR 56.03 and administered by the Massachusetts Department of Housing and Community Development (DHCD), is a proactive strategy for planning and developing affordable housing. The HPP identifies the housing needs of a community and the goals and strategies it will use to identify and achieve or maintain the 10% threshold mandated by M.G.L. Chapter 40B. The Town's status relating to this 10% threshold is documented on the Subsidized Housing Inventory (SHI), also administered by DHCD.

This HPP Program enables municipalities to develop a strategy to meet its affordable housing needs in a manner consistent with the MGL Chapter 40B statute, produce housing units in accordance with that plan, and demonstrate progress towards their affordable housing production. By taking a proactive approach in the adoption of a HPP, cities and towns are much more likely to achieve both their affordable housing and community planning goals. HPPs give communities under the 10% threshold of Chapter 40B who are making steady progress in producing affordable housing on an annual basis, more control over comprehensive permit applications for a specified period. HPPs give communities over the 10% threshold a framework to maintain the statutory minima in accordance with local needs and community goals.

The Town of Concord places great importance on planning for affordable housing through the HPP process. HPPs are updated and renewed every five years per the regulations, and Concord had an approved Housing Production Plan in 2005, in 2010, and in 2015.

Housing Production Plans can create a 'safe harbor' for a community. When a municipality has a certified plan, decisions on comprehensive permit applications by the Zoning Board of Appeals (ZBA) to deny or approve with conditions will be deemed "consistent with local needs" under MGL Chapter 40B.

Housing Production Plans are certified by the following process, as identified in the regulations:

- Prepare the HPP: In accordance with the regulations, write the plan, including a public process, and have the plan adopted by the Select Board and Planning Board.
- Approve the HPP: DHCD approves the plan.
- Certify the HPP: Create affordable units equal to 0.5 of 1% of the total number of housing units in Concord (or 35 for Concord) in one year, or 1.0% (69 for Concord) in two years, and petition DHCD for certification.

- Renew the HPP: The term of the HPP is five years from approval.

Concord has chosen to prepare a Housing Production Plan for three reasons:

1. The 2015 Housing Production Plan expired in January 2021, and this update is being undertaken to regain approval status per state regulations.
2. The Town's best projections are that Concord will fall below its 10% goal under Chapter 40B when 2020 Census data is released in the spring of 2023, and the Town wants to have an approved HPP in place by that time.
3. Only *some* of the strategies defined in the 2015 Housing Production Plan have been implemented, so it is time to reassess those strategies and set future strategic goals and objectives with broad community input.

This Housing Production Plan was prepared by the Regional Housing Services Office, JM Goldson community preservation + planning, and the Planning Division of the Concord Department of Planning and Land Management and was funded with Concord Community Preservation Act funds.

The project started with compilation of available information, creating the Needs Assessment and Development Constraints chapters. The Needs Assessment pulls its information from nineteen³ data sources, including the American Community Survey (ACS) since most 2020 Census data is not available. While the ACS provides a wide breadth of information, it is a survey or sampling of data, statistically significant, but not the comprehensive depth of the Decennial Census. An on-line survey was offered to residents, and advertised in local media starting April 11, 2022 and ending June 10, 2022 (442 people responded). From April 25 through 28, 2022 JM Goldson conducted five focus groups with Concord stakeholders on the topic of housing issues, challenges, and opportunities in the town. Each focus group was made up of between four and seven people, each one with an involvement or investment in the town's housing needs (22 participants total). The project team held three community workshops on June 7, 2022, September 14, 2022, and November 15, 2022 (approximately 115 participants total). Overall, there were about 579 total points of public participation, with an acknowledgement that some people attended more than one event. The Housing Production Plan was reviewed and adopted by the Planning Board and Select Board and Planning Board on [December 13th, 2022 and December 19th, 2022] respectively.

³ Sources include 2000, 2010, & 2020 Decennial Census; 2020 American Community Survey; Warren Group Town Stats; US Census Annual Building Permit Survey; DHCD; Comprehensive Housing Affordability Strategy (CHAS); Local MLS data, Trulia.com, Zillow.com, Concord Housing Authority, Concord/Carlisle School Committee; MA Department of Elementary and Secondary Education (DESE); HUD; Mass Housing Partnership's DataTown; New England School Development Council; MA Department of Corrections

REPORT ORGANIZATION

- Chapter 1 provides an overview of the purpose of the plan, a community overview, description of the planning process, and summary of the Town's housing needs, goals, and strategies and may serve as an executive summary for this report.
- Chapter 2 describes the Town's five-year housing goals, strategies, and action plan as identified through the planning process associated with development of this plan.
- Chapter 3 provides a demographic profile of the community's residents.
- Chapter 4 provides an analysis of local housing conditions including housing supply, residential market indicators, and affordable housing characteristics.
- Chapter 5 describes the Town's development constraints and limitations including environmental constraints, infrastructure capacity, and regulatory barriers and considerations.
- Chapter 6 describes local and regional capacity and resources to create and preserve affordable and mixed-income housing in the community.

COMMUNITY OVERVIEW⁴

Located 20 miles west of Boston, Concord is a picturesque New England community of handsome residences, preserved open spaces, family-owned farms and thriving commercial centers. The Town is served by MBTA commuter rail to Boston, Cambridge and Fitchburg. State highway Route 2 runs through Concord, and Routes 128/95 and 495 are conveniently accessed.

Concord was incorporated as the first inland settlement in Massachusetts through a grant from the Massachusetts General Court dated September 12, 1635. However, the area supported Native American activity long before the European settlers arrived. Concord is home to many significant people and milestones in American history.

Developable land is scarce (due to extensive flood plain and wetlands, active farming uses, and permanently protected open spaces), which has caused the price of land to rise. High land prices contribute to ever-increasing housing costs, which make the Town unaffordable to many who currently reside in the community, as well as those who would like to move into the community. For over 50 years, the Town's boards and committees have worked to increase housing diversity in Town. There have been consistent concerns expressed about preserving economic and social diversity, along with a diversity of the housing stock, while remaining mindful of the Town's rural

⁴ This community overview is drawn primarily from the Concord Town website and the 2015 Housing Production Plan.

and historic traditions, including preservation of open space. Concord is zoned primarily for single-family residences.

EXECUTIVE SUMMARY OF KEY FINDINGS

HOUSING GOALS

1. Achieve and maintain the state’s goal under Chapter 40B that at least 10 percent of Concord’s year-round housing units are countable on its Subsidized Housing Inventory while additionally meeting other stated housing goals.
2. Support healthy aging in the community by expanding the range of affordable and intergenerational housing options.
3. Increase the variety of rental and ownership housing options, especially for families, particularly near transit stations and village centers, to promote smart growth.
4. Encourage new development that promotes protection of natural resources and climate change adaptation and resilience.
5. Assist in stabilizing housing and provide services for Concord's most vulnerable residents – especially those living in inadequate housing conditions, or at risk of homelessness.
6. Encourage the preservation of existing smaller homes and the construction of new smaller homes.
7. Foster diversity, equity, and inclusion in the community through outreach and education about the need for affordable housing, the creation of affordable family units, the creation of group homes for people with disabilities, and affirmative outreach to other target populations.
8. Strengthen working partnerships with organizations focused on addressing housing needs in Concord and the region.
9. Continue to preserve the long-term affordability of existing affordable units.

HOUSING STRATEGIES

1. The Concord Housing Development Corporation (CHDC) creates SHI (Subsidized Housing Inventory) units at Assabet River Bluff, supported by the C (Community Preservation Committee), CMAHT (Concord Municipal Affordable Housing Trust, and CHF (Concord Housing Foundation).
2. The CHDC pursues the creation of affordable subsidized housing units at the 12-acre site in West Concord (Junction Village), supported by town entities (SB, CPC, CMAHT, CHF, community and neighborhood groups).
3. CMAHT pursues other land for the creation of affordable housing, such as at 2229 Main Street, 740 Elm Street, and the Peabody Middle School (1232 Old Marlboro Road), supported and in coordination with the CHDC, Select Board, and CPC.

4. The CMAHT negotiates increased affordable units in privately developed projects in future development proposals and creates SHI units using buy-downs to existing moderate units.
5. Consider amending zoning to reduce the minimum lot size or frontage requirements for all forms of housing, where environmental conditions allow.
6. Research examples of "green" building design requirements and zoning regulations to require and incentivize "green" building design that results in optimally sited, smaller energy, and water-efficient homes powered by renewable energy.
7. Continue to promote redevelopment in areas where goods and services are available, and where sidewalks, bike lanes, and public transportation exists, such as the Thoreau Depot Business District, Concord Center Business District, and the West Concord Depot area.
8. Consider zoning consistent with the MBTA communities law, with inclusionary zoning requirements added (areas within ½ mile of the train stations in West Concord and Concord).
9. Identify strategies to enhance diversity, equity, and inclusion in the town's housing planning, policies, and zoning bylaws, such as promoting 3- and more-bedroom homes for families or group homes for people with disabilities.
10. Strengthen zoning bylaw to allow duplexes by right in all zones (with possible exception of the Residence AA district due to the lack of sewer access), with a restriction on overall massing and scale.
11. Consider the creation of a town-wide inclusionary zoning bylaw.
12. Consider a home rule petition to allow the town to require affordable housing in by-right subdivisions (MGL Ch.41, Section 81M) or pay an option fee.
13. Continue feasibility and analysis to evaluate barriers and opportunities to create new units on Concord Housing Authority properties, and designate capital funding toward construction.
14. Strengthen the coordination, funding, and integration of available social service programs for low-income residents and seniors, including resources to live independently and funding repairs to modest value homes for health and safety, health services, etc.
15. Provide funding support to the Concord Housing Development Corporation to create and preserve existing affordable units.
16. Examine using the borrowing powers of the Community Preservation Act to fund and support a larger affordable housing project.
17. The Select Board supports the Concord Municipal Affordable Housing Trust (CMAHT) by continuing to seek funding at town meeting; through free cash, Community Preservation Act and ARPA funding; and by continuing to seek state authorization for the real estate transfer fee and a building permit surcharge to fund the trust, including professional resources needed to carry out an expanded mission.
18. Continue to host and support membership in the Regional Housing Services Office.

19. Explore opportunities for strategic sewer, pedestrian/bicycle connections, and other necessary infrastructure expansion to allow denser development in smart-growth locations around village centers and affordable housing developments.
20. Continue to participate in the WestMetro HOME Consortium.
21. Continue participating in the Local Option for Housing Affordability coalition to petition the legislature for home rule or other strategies to provide long-term funding for the CMAHT (such as the real estate transfer fee and the building permit surcharge).
22. Continue integrated housing collaboration with the Select Board, CHDC, CMAHT, CHA, CHF, Planning Board, and Community Preservation Committee through the Concord Housing Roundtable and other forums, clarifying and tracking the status and responsibilities for Housing Production Plan implementation (
23. Continue affirmative outreach to target populations [low-income, seniors, BIPOC (black, indigenous, and people of color), Concord employees] to increase awareness of existing affordable housing programs and assistance at local and state levels.
24. Foster outreach and education about local and regional affordable housing needs through a positive public relations campaign.

DEMOGRAPHIC PROFILE

- Concord has had more substantial population growth in the past two decades than in prior recent decades. Following a population boom between 1960 and 1970, population growth was modest for a few decades, but has grown 9% between 2000 and 2020.
- The percentage of residents identifying as White in Concord dropped from 91.6% in 2000 to 82.9% in 2020. The number of residents who identify as “other” or mixed race has seen the most growth – from 549 residents in 2000 to 1,501 residents in 2020 (173% increase). There was a decrease in the percentage of those identifying as Black or African-American residents between 2010 and 2020 – from 3.8% of Concord’s population in 2010, to 3% in 2020, half of whom are in the two Concord prisons.
- Younger households comprise a smaller and smaller percentage of Concord’s population. Older households (55+) were a little less than half (46%) of Concord’s population in 2000, but were 57% of households in 2010, and 61% of households in 2020.
- Household size is increasing, as well as the number of non-family households.
- Although 70% of Concord’s households have incomes over 100,000, 25% (1,619) of households have incomes less than \$75K. The great majority of lower income households are 65+.

HOUSING CONDITIONS

- 27.6% of Concord’s housing stock is multi-family – this is more housing diversity than all but two comparison communities.

- Older and younger households are more likely to be renters.
- The median price of single-family homes increased dramatically in the past five years.
- Smaller, lower priced homes are disappearing from Concord.
- Concord has issued virtually no permits for multi-family units in the past five years.
- Concord's median gross rent, according to Census data, and snapshot data from Trulia.com, indicate that much of Concord's rental housing costs more than the fair market rent (FMR) for nearly all unit sizes.
- 27.5% of Concord households are low income, earning less than 80% of AMI and therefore may be eligible for housing assistance through most federal and state programs.
- Concord has had a net loss in units on the SHI since 2015 (from 718 to now 715), with few units in the pipeline. It is likely that Concord will fall below the 10% in 2023 when the SHI is recalibrated with the new Census data.
- 31% of all Concord households are cost burdened, paying 30% or more of their income on housing costs; The problem is worse among renter households -- nearly half are cost-burdened.
- The clear majority (83%) of Concord's very low-income households (50% AMI or below) are housing cost burdened.
- 10.43% of Concord's housing, or 715 units, is recorded on the state's Subsidized Housing Inventory. However, half of these SHI units are actually market rate (due to counting rules for rental properties) reducing the SHI to 5.21% if considered separately from the inventory.
- Single-family home prices are rising faster than income in the last decade. The median income has risen 34%, and the median home price 70%.

ENVIRONMENTAL CONSTRAINTS

- According to the 2015 Open Space & Recreation Plan (OSRP), 59% of Concord's total land area is considered open space, with 38% of all land in town listed as permanently protected open space.
- Approximately 50% of the town is under the NRC jurisdiction per the Wetland Protections Act (WPA) and Wetlands Bylaw.
- Global climate change will only increase the frequency and severity of flooding events in Concord.

INFRASTRUCTURE CAPACITY

- Almost all Concord residents have access to town water, and about 35% of the town residents have access to town sewer.
- Wastewater treatment is a constraint to denser development throughout Town.
- Concord is served by the MBTA Commuter Rail with service to Boston from two stations.

- Concord is a destination for cyclists attracted to its beauty, terrain, cultural sites, shopping, dining, and recreational resources including the newly-opened Bruce Freeman Rail Trail, connecting Lowell to Framingham in its final implementation.

REGULATORY BARRIERS AND CONSIDERATIONS

- In 2020, zoning was changed to expand the potential for development of attached and detached accessory dwelling units. Accessory Apartments (or Additional Dwelling Units (ADUs)) are allowed by right in all Residential Districts when certain criteria are met, and by special permit when relief from certain criteria is needed.
- In 2021, the bylaw was further amended to allow a two-family dwelling by Special Permit in the Residence C Zoning District and allow the Zoning Board of Appeals to reduce the requirement for two parking spaces for each dwelling unit.
- Concord's zoning bylaw provides some flexibility for alternative housing development through the Planned Residential Development (PRD). Planned residential developments allow for single-family detached, attached dwellings, or multi-unit structures of all types in accordance with Section 10 of the zoning bylaws in all Residential and Business Zones.
- The Business Districts and certain Limited Business Districts allow combined business/residence uses by right. This use allows multi-family housing when combined in the same building with commercial uses. It also requires that at least 20% of the dwelling units be affordable.
- However, the only residential uses allowed by-right in residential districts are single-family dwellings.
- Therefore, zoning is a major constraint in diversifying Concord's housing efforts, because over 90% of the town is zoned for residential use, and the development pattern has been primarily single-family housing.

IMPLEMENTATION CAPACITY & RESOURCES

- The Concord Housing Authority operates 132 units of public housing and administers 85 Section 8 vouchers, assisting more than 375 people.
- Since its inception, the Concord Housing Foundation has raised almost \$1,000,000.
- In total, the Community Preservation Committee has appropriated \$27.1 million across all CPA categories, with 21% (\$5,816,672) spent on community housing per the 2022 CPA plan. They have provided funding more than \$1M since 2020, including the Housing Production Plan update, the Regional Housing Services Office membership, the CHDC housing buy down program, and the Assabet River Bluff land acquisition.
- The Concord Housing Development Corporation is a 501c3 organization, developing and creating affordable housing in Concord. They have created 11 homes at Lalli Woods and Main St, contributed funds to create a lower level of affordability for one new housing

unit, preserved the housing restrictions on two units at Emerson Annex and are the landowners of the 12-acre site known as Junction Village, and 1 acre site known as Assabet River Bluff. Additionally, the CHDC administers the Small Grant Program.

- The Regional Housing Services Office supports Concord and other neighboring municipalities with affordable housing services since its inception in 2011.
- The recently created Concord Municipal Affordable Housing Trust currently has just over \$1 million in its fund to use towards affordable housing. The Concord Municipal Affordable Housing Trust (CMAHT) is a town board which administers funds for affordable housing. Town Meetings from 2019 to 2022 appropriated a total of \$2,000,000 into the Trust. The Select Board and CPC are recommending \$2.04-million be committed from the Christopher Heights project at Junction Village be added to the Trust by the 2023 Town Meeting. The Town is seeking legislative approval for a real estate transfer fee and a building permit surcharge to also fund the Trust. Since its inception in 2021, the Trust has committed \$945,000 towards 4 different projects, contributing towards the creation of 7 new units of subsidized housing.
- The Concord Housing Roundtable is a unique example of coordination and collaboration between municipal housing groups.

CHAPTER 2: HOUSING GOALS AND STRATEGIES

The housing goals and strategies detailed in this report are based on the findings of the demographic and housing analysis incorporated herein, as well as observations and preferences of community participants that were gathered through a variety of engagement methods. The Town solicited community input through focus groups on April 20th and April 26th, three public forums on June 6th, September 14th, and November 15th; and a public survey. This chapter outlines the major goals and strategies for achieving Concord's housing priorities.

The goals of this plan are consistent with [the Comprehensive Permit Regulations \(760 CMR 56\)](#) as required by DHCD for Housing Production Plans:

- a) a mix of housing types, consistent with local and regional needs and feasible within the housing market in which they will be situated. This includes rental, homeownership, and other occupancy arrangements (if any) for families, individuals, persons with special needs, and the elderly.
- b) a numerical goal for annual housing production pursuant to which there is an increase in the municipality's number of SHI Eligible Housing units. This represents at least 0.50 percent of its total units [in accordance with 760 CMR 56.03(3)(a)], during every calendar year included in the HPP, until the overall percentage exceeds the Statutory Minimum of 10% of its total year-round housing units, pursuant to M.G.L. c. 40B, and as set forth in 760 CMR 56.03(3)(a). Based on Concord's 2010 US Census figure of 6,852 year-round housing units, Concord's 10% goal would be met with 686 countable units on the SHI and its 0.50% goal of 35 units per year. As described in the Quantitative Goal below while Concord currently has 715 units on its SHI, the Town projects it will fall below 10% when the 2020 US Census year-round housing unit figure (estimated at between 7,295 and 7.795) is released in May 2023."

KEY FINDINGS

Please see the Executive Summary for a list of all goals and strategies.

FIVE-YEAR GOALS

A Housing Production Plan approved by DHCD expires after five years. If DHCD approves this HPP in early 2023, it would be in effect through early 2028, encompassing Fiscal Years 2023 through 2028. The goals of this five-year plan are intended to provide guidance for local housing policies and initiatives but do not bind future actions or decisions of local officials or the local legislative body (town meeting). The 9 goals, which are intended to accommodate Concord's

housing needs, include one that is a specific quantitative production goal and eight qualitative goals. The goals listed are in no particular or priority order.

Note: The DHCD 10 percent goal under Chapter 40B is a minimum target. Concord's overall housing goals seek to create a variety of housing opportunities that will foster Concord's vibrancy, meet the needs of the community, and maintain Concord's unique charm.

QUANTITATIVE GOAL

1. ACHIEVE AND MAINTAIN THE STATE'S GOAL UNDER CHAPTER 40B THAT AT LEAST 10 PERCENT OF CONCORD'S YEAR-ROUND HOUSING UNITS ARE COUNTABLE ON ITS SUBSIDIZED HOUSING INVENTORY (SHI), WHILE ADDITIONALLY MEETING OTHER STATED HOUSING GOALS.

In 2022, Concord has 10.43 percent on the SHI, which is based on 2010 US Census data which will change in 2023. That 10.43% is calculated by dividing 715 countable SHI units by 6,852 year-round housing units per the 2010 US Census. And while this is 29 units over the Town's 10 percent goal under Chapter 40B based on a 2010 Census denominator, by May 2023, Concord is expected to fall below 10 percent based on 2020 U.S. Census data which will then be officially released;⁵ and which is predicted to be between 7295 and 7795 year-round housing units⁶. Based on the 2020 US Census, and with an approved Housing Production Plan in place by 2023, Concord could obtain "Safe Harbor" certification for a period of one year by creating 36-38 new SHI units; or for a period of two years by creating 72-77 new SHI units.

Either action would almost certainly raise Concord above its overall 10 percent requirement under Chapter 40B. Concord's 10% goal would be met with 730-780 countable units on the SHI. Concord has 715 total SHI units currently, leaving a potential deficit of 15 to 65 units. However, Concord has lost a net of 3 units on the SHI since the last HPP was approved in 2016, from 718 units to now 715 units, having created 8 units and lost 11 group home beds. It will require a coordinated and consistent funding and staff time effort on the Town's part to

⁵ Note that the shortfall might be as high as twenty or low as eight, though the trend of losing Massachusetts Department of Children & Families (formerly Dept. of Social Services) units puts pressure on creating new units.

⁶ Regional Housing Services Memo, dated September 19, 2022. The census has published the housing units in Concord as 7,295, however this is 500 units less than the building permit survey data also from the Census. The SHI denominator figure adjusts that figure by subtracting the 'seasonal' units (which were 95 in the 2010 Census). These considerations make precise projections difficult to make.

achieve such housing production goals during the life of this HPP. Failing to achieve such goals will open the Town to so-called “unfriendly 40B” proposals for private developments at locations and densities not of the Town’s choosing.

QUALITATIVE GOALS

2. SUPPORT HEALTHY AGING IN THE COMMUNITY BY EXPANDING THE RANGE OF AFFORDABLE AND INTERGENERATIONAL HOUSING OPTIONS.

Concord’s population is aging and has a comparatively high number of non-family households, likely because the increasing number of older residents are more often comprised of non-family households. Many older adults need alternatives to single-family homes to continue to live in the community as their housing needs change. Housing choices are limited in Concord – 72.4 percent of Concord’s existing housing stock are single-family homes. More diverse housing options can provide choices for both older and younger residents.

3. INCREASE THE VARIETY OF RENTAL AND OWNERSHIP HOUSING OPTIONS, ESPECIALLY FOR FAMILIES, PARTICULARLY NEAR TRANSIT STATIONS AND VILLAGE CENTERS, TO PROMOTE SMART GROWTH.

Concord has significant infrastructure and environmental constraints. Only 35 percent of the Town’s population has access to town sewer, and large portions of the town are in flood zones (exact percent unknown), contain wetlands (50 percent), or are permanently protected open space (38 percent). Strategic areas for accommodating a variety of housing options are those with minimal environmental constraints, and where community resources and transportation connections exist, such as in locations near train stations, village centers, and areas with access to sewer.

4. ENCOURAGE NEW DEVELOPMENT THAT PROMOTES PROTECTION OF NATURAL RESOURCES AND CLIMATE CHANGE ADAPTATION AND RESILIENCE.

The Town of Concord has a long history of sustainability and ambitious climate and sustainability goals. This includes a Climate Action and Resilience Plan (2020) with a 2050 goal of reducing community-wide greenhouse gas (GHG) emissions by 80 percent in alignment with both the Paris Climate Accord and the Massachusetts Global Warming Solutions Act. Promoting green housing initiatives may require additional funding, and it will be important to prioritize green affordable housing projects, including increasing funding requests to accommodate these net-zero and passive homes, to help achieve the Town’s climate and sustainability goals. Also, important will be creating new housing options through reuse or adaptation of existing buildings because this will reduce demolition waste, maximize the life use of materials, reduce carbon emissions by using those embodied in the existing building, conserve raw materials by reusing existing resources, etc.

In March 2021, “An Act Creating a Next-Generation Roadmap for Massachusetts Climate Policy” was signed in law. This bill makes significant steps toward addressing climate change in the Commonwealth and meeting climate and energy goals for 2025 and 2030. In August 2022, one of the provisions in [Chapter 179 of the Acts of 2022](#), “An Act Driving Clean Energy and Offshore Wind, is a demonstration project in Section 84 to be administered by the State’s Department of Energy Resources (DOER) that would allow up to 10 municipalities to prohibit fossil fuel use in new building construction or major renovation projects. To be eligible, the municipality must either meet the 10 percent housing affordability threshold established by Chapter 40B, be granted “safe harbor” status through an approved Housing Production Plan, or have approved a zoning ordinance/bylaw that provides for one or more districts with at least 15 units per acre in which multifamily housing is permitted by right (suitable for families with children and without age restriction). Concord was one of the first ten communities to file a “fossil fuel-free” home rule petition and looks to participate in the demonstration project.

5. ASSIST IN STABILIZING HOUSING AND PROVIDE SERVICES FOR CONCORD'S MOST VULNERABLE RESIDENTS – ESPECIALLY THOSE LIVING IN INADEQUATE HOUSING CONDITIONS, OR AT RISK OF HOMELESSNESS.

Many low-income residents, including seniors, struggle with housing costs and with houses that are not well-suited to their abilities or needs as they age. Residents need help with housing rehabilitation to improve health and safety, improve energy efficiency, and assist with housing costs. Concord will work to support the housing needs of vulnerable residents, especially those who are living in inadequate housing conditions or are in danger of homelessness. Concord will seek out new ways to expand local assistance and maximize such support by leveraging state and other public or private programs.

6. ENCOURAGE THE PRESERVATION OF EXISTING SMALLER HOMES AND THE CONSTRUCTION OF NEW SMALLER HOMES.

Since 2015, 155 smaller homes (out of 275 new houses constructed in the same timeframe) were demolished to make way for new, larger homes. Larger homes typically have more bedrooms as compared to the household size, and these make up the bulk of housing in Concord. This factor, along with rising property values, places much of Concord's housing stock well out of reach of even households with higher average income. Preserving smaller homes will take a conscious effort to ensure the owner receives the benefit of having a house-lot in Concord and could be accomplished by creating a program for outright purchase of smaller homes and placing a deed restriction on the property to limit the size of new construction. Alternatively, community-minded property owners could benefit from access to

legal guidance where they could voluntarily limit the size of future new construction on their lot through the addition of a deed restriction.

The Town also needs a greater variety of housing options to meet local housing needs and to help promote a socio-economically diverse population. This includes preserving and diversifying housing stock to include the "missing middle" options such as accessory dwelling units, duplexes, and cottage housing (e.g., the Riverwalk, Ingham Lane, and Mill Run developments on Main Street created using the Planned Residential Development option in the Zoning Bylaw). Another method for promoting construction of new smaller homes would be to revise the floor-area-ratio to promote smaller size homes on certain size lots.

7. FOSTER DIVERSITY, EQUITY, AND INCLUSION IN THE COMMUNITY THROUGH OUTREACH AND EDUCATION ABOUT THE NEED FOR AFFORDABLE HOUSING, THE CREATION OF AFFORDABLE FAMILY UNITS , THE CREATION OF GROUP HOMES AND AFFIRMATIVE OUTREACH TO TARGET POPULATIONS.

Throughout the country, there are deeply entrenched structural dynamics that drive the spatial patterns of residential segregation by race and income in metropolitan areas. Society has borne tremendous costs from public policies and programs at all levels of government. These were, in many cases, intentionally discriminatory, while in other cases they had unintentional consequences, particularly over the last century as suburbanization and promulgation of the so-called American Dream. Although these facts are gaining visibility in the public conscience, many people are not aware of this history and how it has affected our current-day realities. Greater awareness can help lead to implementation of solutions to integrate more housing options, including affordable options, into high-opportunity communities, such as Concord. See, for example, Richard Rothstein's [*The Color of Law: A Forgotten History of How Our Government Segregated America*](#), 2017; and Lily Geismer's [*Don't Blame Us: Suburban Liberals and the Transformation of the Democratic Party*](#), 2014.]

In [*MetroCommon 2050*](#), the regional plan for the 101 cities and towns in Metro Boston, the Metropolitan Area Planning Council (MAPC) identifies recommended measures to:

- [Ensure that people of all races and income levels have equal access to affordable housing through homeownership and rental opportunities in every community](#); and
- [Accelerate the production of diverse housing types throughout the region, particularly deed-restricted affordable housing, with a focus on transit-oriented, climate resilient and other smart growth locations.](#)

To promote diversity, equity, and inclusion, the Concord Select Board's goals for FY 2023 include:

- C.03. Work with the DEI Commission to research and implement diversity, equity, and inclusion best practices in town governance. Listen to diverse voices in the community and assess which additional DEI actions the Select Board should take; and
- C.04. Provide input to the housing production plan update to maximize the equity and diversity impacts of future affordable housing initiatives. Review and adopt the completed plan.

Concord currently has a sizable population age 55+ which exceeds the proportion of residents age 55+ across the state. Prioritizing affordable family units with three or more bedrooms will promote greater socioeconomic, age, and racial diversity, as well as supporting workforce housing and non-traditional families. There is also the need for group homes for people served by organizations such as Minute Man Arc.

The Town Boards and Committees and staff with housing responsibilities should:

- Prioritize affordable family housing to promote diversity, including socioeconomic diversity, age diversity, racial diversity, and non-traditional families.
- Advocate for a meaningful number of units with three or more bedrooms to be balanced with any assisted living developments so that affordable housing efforts don't simply reinforce an already disproportionately large demographic.
- Advocate for the addition of group homes in the community to support those who need this housing option.

A list of all the Housing Production Plan strategies which address diversity, equity, and inclusion are indicated in the Action Plan, which follows directly after the Goals and Strategies.

8. STRENGTHEN WORKING PARTNERSHIPS WITH ORGANIZATIONS FOCUSED ON ADDRESSING HOUSING NEEDS IN CONCORD AND THE REGION.

Concord is fortunate to have several organizations helping to address housing needs in the community. These organizations provide affordable housing, financially support affordable housing development, and provide housing assistance or other related support, such as community education and advocacy. To further address local housing needs, the Town intends to continue to support and expand the initiatives of these organizations.

9. CONTINUE TO PRESERVE THE LONG-TERM AFFORDABILITY OF EXISTING AFFORDABLE UNITS.

Actively monitoring affordability requirements ensures that all projects are following their obligations. For rental developments, this means that the units are marketed openly, and tenant leasing procedures are fair, that the units are in good repair, the rents are affordable

and that the tenants continue to be eligible. For ownership homes, the owners must live there as their primary residence and obtain approval of any refinancing.

As described on the Community Economic Development Assistance Corporation (CEDAC) website, expiring low-income use restrictions are an issue for three reasons:

- 1) When affordable units become market-rate units, LMI families and individuals can be displaced from their homes and even the community;
- 2) There is a loss of affordable housing options in the community; and
- 3) The expired units no longer meet the Town's SHI to fulfill the state's C.40B 10 percent goal. Sometimes units are lost from the SHI due to circumstances beyond the Town's control, such as in the case of DDS group homes in recent years as well as set affordability expiration dates.

FIVE-YEAR STRATEGIES

Achieving the community's five-year goals will require a variety of regulatory, programmatic, and policy strategies. This section includes descriptions of local regulatory strategies, local initiatives, and strategies that deal with implementation capacity, education, and outreach. The intent is not to suggest that Concord will implement all these strategies over five years, but rather, to offer multiple ways the community can work to achieve its goals. Many of these strategies are contingent on factors beyond the municipality's control, including market opportunities and funding availability. All strategies will require local approvals in accordance with applicable laws and regulations.

This plan's strategies comply with the requirements of the Comprehensive Permit Regulations (760 CMR56), which are summarized as follows:

The HPP shall address the matters set out in the Department's guidelines, including an explanation of the specific strategies by which the municipality will achieve its housing production goal, and a schedule for implementation of the goals and strategies for production of units, including all the following strategies, to the extent applicable:

- a) The identification of zoning districts or geographic areas in which the municipality proposes to modify current regulations for the purposes of creating SHI-Eligible Housing developments to meet its housing production goal;
- b) The identification of specific sites for which the municipality will encourage the filing of Comprehensive Permit applications;
- c) Characteristics of proposed residential or mixed-use developments that would be preferred by the municipality (examples might include cluster developments, adaptive reuse, transit-oriented housing, mixed-use development, inclusionary housing, etc.);
- d) Municipally owned parcels for which the municipality commits to issue requests for proposals to develop SHI Eligible Housing; and/or
- e) Participation in regional collaborations that address housing development.

The strategies are organized into four categories and are in no particular order:

- A. Production Strategies to maintain at least 10 percent of housing units on the SHI
- B. Planning, Policies, and Zoning Strategies
- C. Local Initiatives and Programmatic Strategies
- D. Capacity, Coordination, and Education

PRODUCTION STRATEGIES TO MAINTAIN 10 PERCENT OF UNITS ON THE SHI

1. THE CONCORD HOUSING DEVELOPMENT CORPORATION (CHDC) CREATES SHI UNITS AT ASSABET RIVER BLUFF, SUPPORTED BY THE CPC, CMAHT AND CHF.

Background: The seven-acre Assabet River Bluff property was acquired in August 2022 in a widely endorsed collaborative effort between open space and community housing. One acre of that property was purchased by the Concord Housing Development Corporation for \$950,000 (and \$50,000 for pre-development) with funding from the Concord Municipal Affordable Housing Trust (\$650,000), the Concord Housing Foundation (\$50,000 towards the purchase, and another \$50,000 towards development), and the Town's Community Preservation Fund (\$300,000 for housing). The property was identified in the Concord Open Space and Recreation Plan, as well as in the River Stewardship Council's Wild & Scenic Prioritization Plan, as a priority parcel for protection, and is consistent with Concord's sustainability goals.

The six acres acquired by the Town of Concord for its Natural Resources Commission will be permanently protected as open space, with public access on trails connecting to the Bruce Freeman Rail Trail. This acreage is about twice what would be undevelopable under wetlands and rivers protection legislation.

The one acre acquired by CHDC is set aside for five affordable housing units. The existing two-unit home at 406 Old Marlboro Road will be renovated and made permanently affordable, and three new affordable units will be constructed following a competitive request for proposal process. This property acquisition, which spanned more than twelve months, involved stakeholders, community members, and multiple Town boards and committees, and included nearly-unanimous votes at a Town meeting.

Status: The CHDC is currently designing the site and will proceed through the phases in Table 1 below.⁷

⁷ Exhibit B of the mortgage from CHDC to CMAHT filed at Bk 80551 pg 364 at Middlesex South Registry of Deeds

Table 1. Assabet River Bluff Timeline

Item	Proposed Timeline
Design site layout access and entrance, septic, parking, storage, homes. Review with boards, public, interested parties.	2023
Issue Request for Proposal (RFP) for construction. Determine rental or ownership. Indicate building preferences and requirements, leaving room for developer design. Include indication of subsidy and target affordability level(s).	2023
Award request for proposal for construction, including development services agreement if needed	2024
Obtain financing commitment for construction. Include local funds. Likely to require town meeting with active campaign. Revise land and refine construction costs quarterly.	2024-2025
Obtain zoning permit for construction. Likely using Planned Residential Development (PRD) zoning. Requires the design documents, engineered site plan.	2025
Record housing restriction, using the Department of Housing and Community Development (DHCD) Local Initiative Program (LIP)	2026-2027
Convey property to developer, with closing documents, and appropriate agreements	2027
Construct units, through phasing as designed	2028
Occupancy of units, including resident selection	2028-2029

Location: 2B Upland Road and 406 Old Marlboro Road

Figure 1. Site Diagram: Concept drawing (12/1/2022) 1 acre for affordable housing; 5 affordable dwelling units planned



2. THE CHDC PURSUES THE CREATION OF SUBSIDIZED HOUSING UNITS AT THE 12-ACRE SITE IN WEST CONCORD (JUNCTION VILLAGE), SUPPORTED BY TOWN ENTITIES (SB, CPC, CMAHT, CHF, COMMUNITY AND NEIGHBORHOOD GROUPS).

Background: In 2013, after years of discussion with the State, the Concord Housing Development Corporation (CHDC-JV, LLC) was given this 12-acre property off Winthrop Street for nominal consideration from the Massachusetts Department of Corrections, pursuant to Chapter 117 of the Acts of 2010, which provides that “[s]uch land shall be used for housing, of which 100 per cent shall be deemed affordable housing as determined by the ranges established by the Concord Housing Development Corporation and for public open space purposes.” The CHDC embarked on a developer selection process in 2014. After broadly reviewing 12 different proposals through public presentations, with Town committees, and with the Select Board, the CHDC selected The Grantham Group and its assisted living proposal, as there was opposition from town boards and residents on family housing proposals. The project, supported at the time by town boards, committees and residents, was included in the 2015 Housing Production Plan approved by the Select Board, Planning Board, and DHCD. The Grantham Group’s Christopher Heights project was permitted for 83 affordable assisted living units. The project received its Comprehensive Permit in 2017, extended through May 1, 2023.

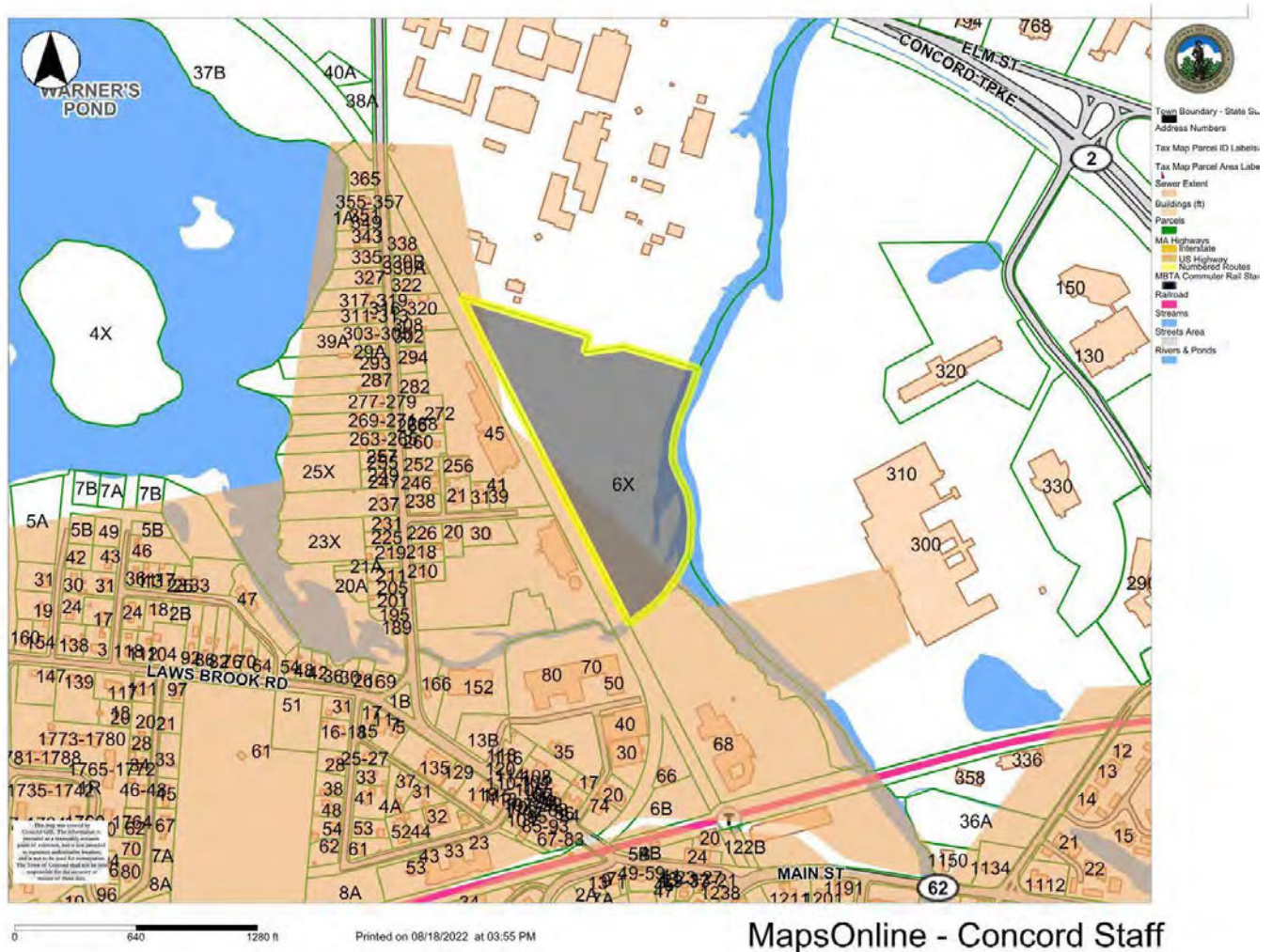
Status: Christopher Heights was awarded low-income housing tax credits and public subsidies by DHCD in February 2020 – yet the development was unable to close on the transaction before the COVID pandemic. Because of the severe economic consequences of the pandemic, projects across the state similar to this one have been faced with significant cost increases resulting in budget shortfalls. DHCD required this project, as well as 34 others, to reapply for financing with updated pro formas, and made it clear that for developers to be awarded funding, they must demonstrate significant additional financial support from the host municipality. The project budget had a \$1million gap. After some discussion of alternatives, the Select Board was not supportive of the project, and though the CMAHT voted to commit their funds to cover the gap, the developer withdrew the project from consideration. The Town is currently in the process of releasing the previously committed funds and terminating the agreements. In parallel to the residential project, the town pursued open space and recreation uses on the site alongside the residential portion. These plans had progressed to initial design and award of CPA funds for the start of development but are now on hold until the next affordable housing project is approved.

The CHDC continues to own the site. Over time, the CHDC plans to reevaluate ideas for housing development at the site and obtain community support before embarking on any site

design, building preferences and requirements, issuing a request for proposal (RFP), and developing a financing plan. As all housing units on this site must be affordable, there will likely be significant additional funding requirements, proportional to the number of units proposed. The prior plan proposed enough units to both qualify for state subsidies as well as achieving the 10%, resulting in a large funding request to the town. As reported in the pipeline section, the units will likely be available to the SHI in a 10-year plus timeframe.

Location: The 12.8-acre site is located at the end of Winthrop Street and is south of the MCI-Concord correctional facility; east of the Bruce Freeman Rail Trail, north of Nashoba Brook, and west of the Assabet River (Parcel 2013-1).

Figure 2. Site Diagram of Junction Village



3. CMAHT PURSUES OTHER LAND FOR THE CREATION OF AFFORDABLE HOUSING, SUCH AS AT 2229 MAIN STREET (FORMER STARMET SITE), 740 ELM STREET (BEST WESTERN), AND THE PEABODY MIDDLE SCHOOL (1232 OLD MARLBORO ROAD), AND OTHER PROPERTIES SUPPORTED AND IN COORDINATION WITH THE SELECT BOARD, CPC, AND TOWN MEETING.

The Concord Municipal Affordable Housing Trust (CMAHT) could advocate for the reuse of one or more school sites for housing, with an emphasis on affordable housing. The CMAHT could lead the effort to make municipal and other properties available for housing whether by purchase or disposition. From there, the CMAHT could sell or transfer to a development entity (for example, the CHDC) with stipulations for creation of affordable housing. The Town could transfer Town-owned land or work with the state to transfer state-owned land to the CMAHT, and then sell or transfer to a development entity (via RFP). Similarly, if the Town invited the CHDC to participate, the Concord Housing Development Corporation (CHDC) could also purchase land and then convey out for development by recruiting mission-based developers. The League of Women Voters reviewed some parcels owned by the Town, CHA, and state, including the Peabody School.

There are several parcels in private ownership which might be appropriate for residential developments across Concord, through 40B or other processes:

- A. 300-310 Baker Ave. – a mixed use location
- B. 221 Baker Ave. (New Life Community Church) – a mixed use location
- C. 874 Barretts Mill Road (near the Concord Rotary)
- D. 100 Main Street (existing office building)
- E. 91 Lowell Road (existing retail building)
- F. 4B Old Road to Nine Acre Corner – open lot adjacent to Care One
- G. Land (12 acres total) at the corner of Old Road to Nine Acre Corner and Old Marlboro Road opposite Emerson Hospital (and currently owned by Emerson Hospital).
- H. 91B Main Street (owned by the State – adjacent to a Habitat for Humanity property)
- I. 7X Old Bridge Road and 80 X Main Street (undeveloped land)
- J. 46 B Fitchburg Turnpike (adjacent to Cold Brook Crossing development on Rt. 117)

See the Appendix and potential development map below for locations.

4. THE CMAHT NEGOTIATES INCREASED AFFORDABLE UNITS IN PRIVATELY DEVELOPED PROJECTS IN FUTURE DEVELOPMENT OPPORTUNITIES AND CREATES SHI UNITS USING BUY-DOWNS TO EXISTING MODERATE UNITS.

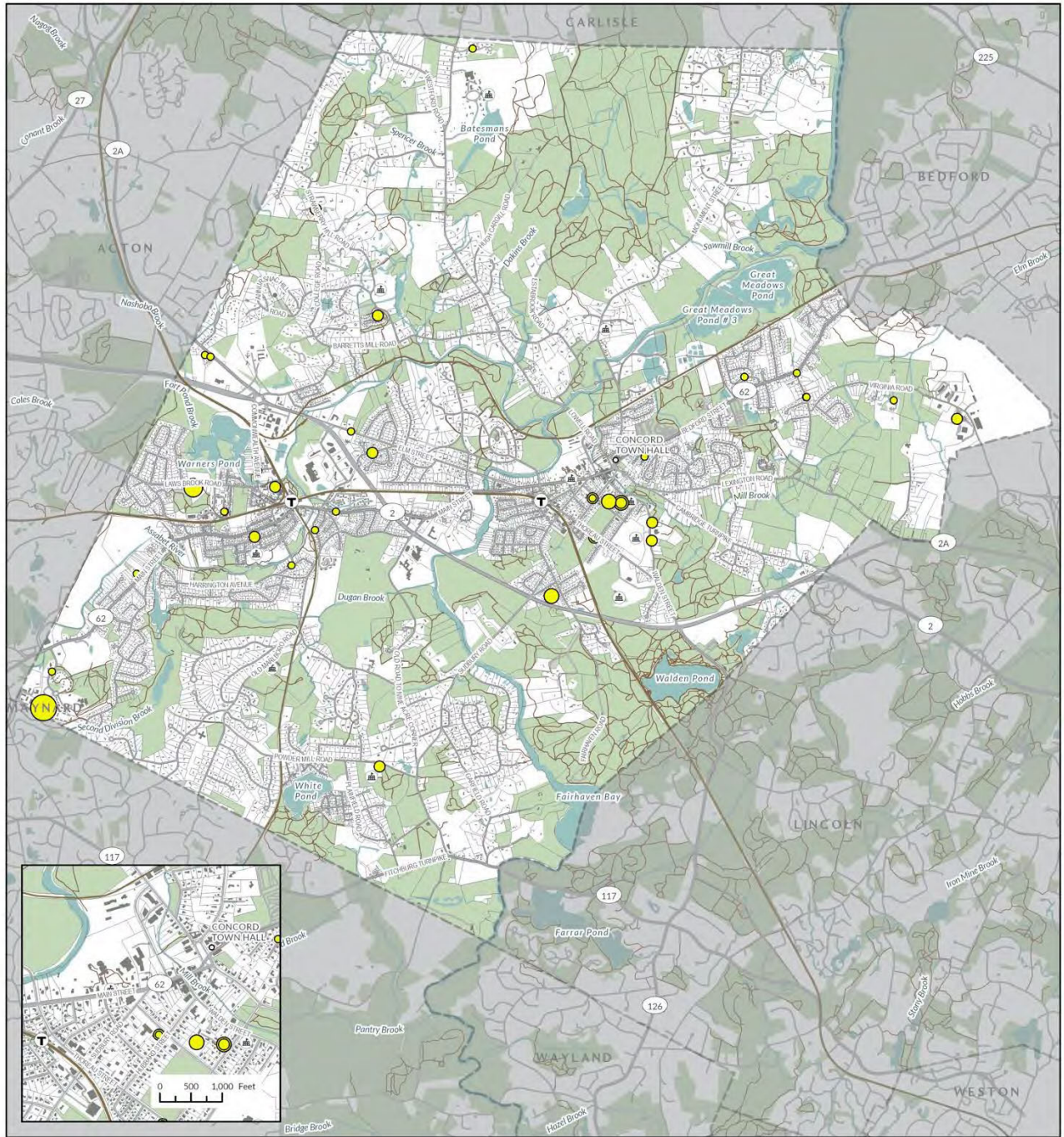
The CMAHT could create additional affordable units by issuing an RFP indicating its desire to fund increased affordability in private developments, work with the Planning Board to

negotiate increased affordability into future developments, or buying down moderate income units to SHI-eligible levels on resale. These strategies continue to collaborate in fostering private affordable housing development to serve local needs. This would include utilizing CPA and Housing Trust funds to cover gaps in funding through grants or loans, and to demonstrate local commitment to secure competitive funding from other state, federal, and/or private sources as available. For Town Meeting 2023, the Planning Board has proposed an article to tailor the percentage of affordable housing required in smaller multifamily unit developments, and to add an in-lieu of fee option for calculations of less than 1 unit, to make it more practical for small developers to implement affordable housing. See Figure 3, Subsidized Housing map below for prioritized locations.

Figure 3. Concord Existing SHI Locations

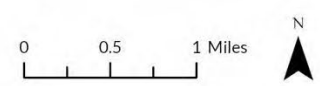
TOWN OF CONCORD - SUBSIDIZED HOUSING
 Prepared by JM Goldson LLC

J M GOLDSON



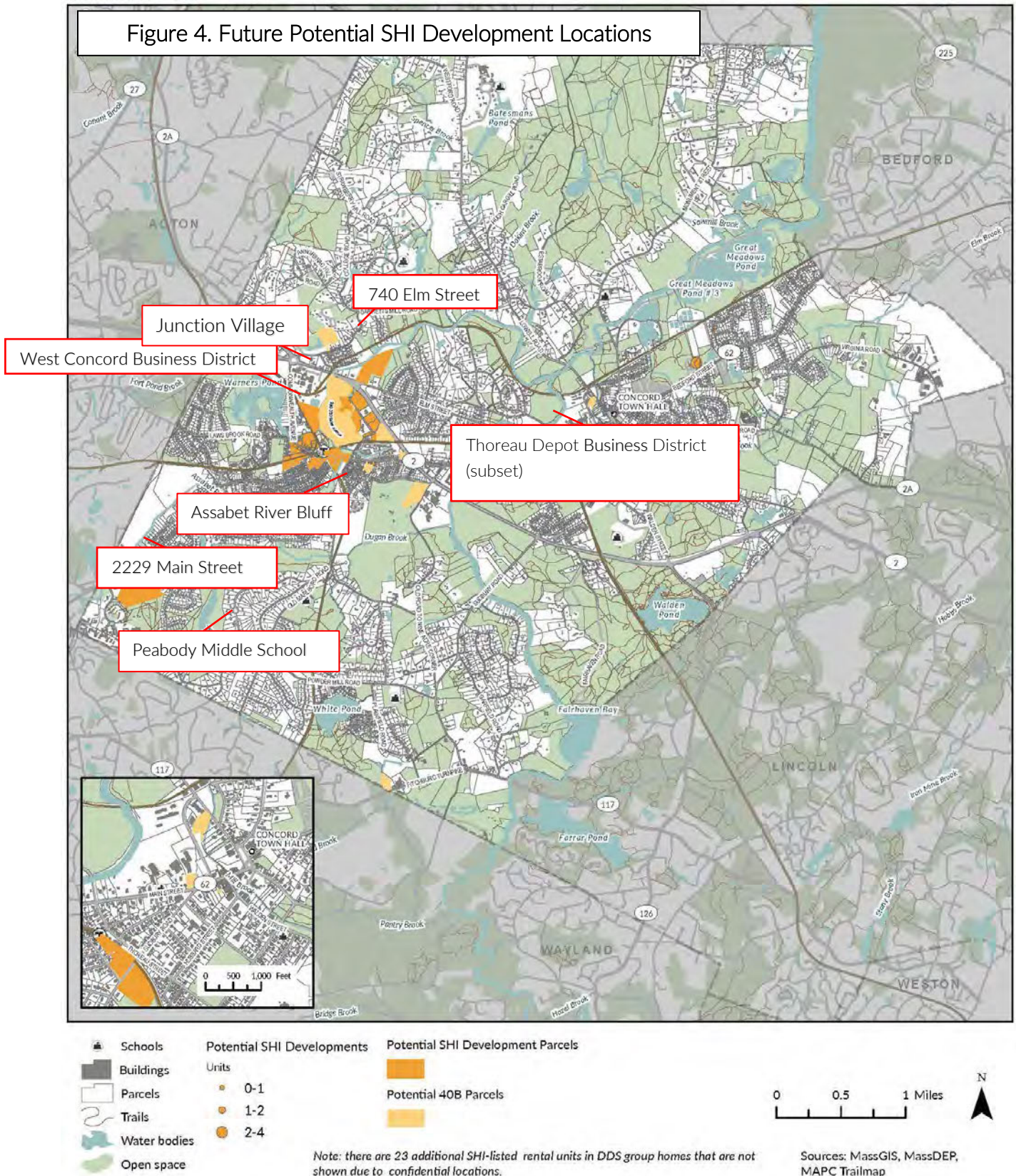
- Schools
 - Buildings
 - Parcels
 - Trails
 - Water bodies
 - Open space
- Subsidized Housing Inventory (SHI) Units**
- 1-4
 - 5-20
 - 21-50
 - 51-80
 - 81-350

Note: there are 23 additional SHI-listed rental units in DDS group homes that are not shown due to confidential locations.



Sources: MassGIS, MassDEP, MAPC Trailmap

Figure 4. Future Potential SHI Development Locations



PLANNING, POLICIES, AND ZONING STRATEGIES

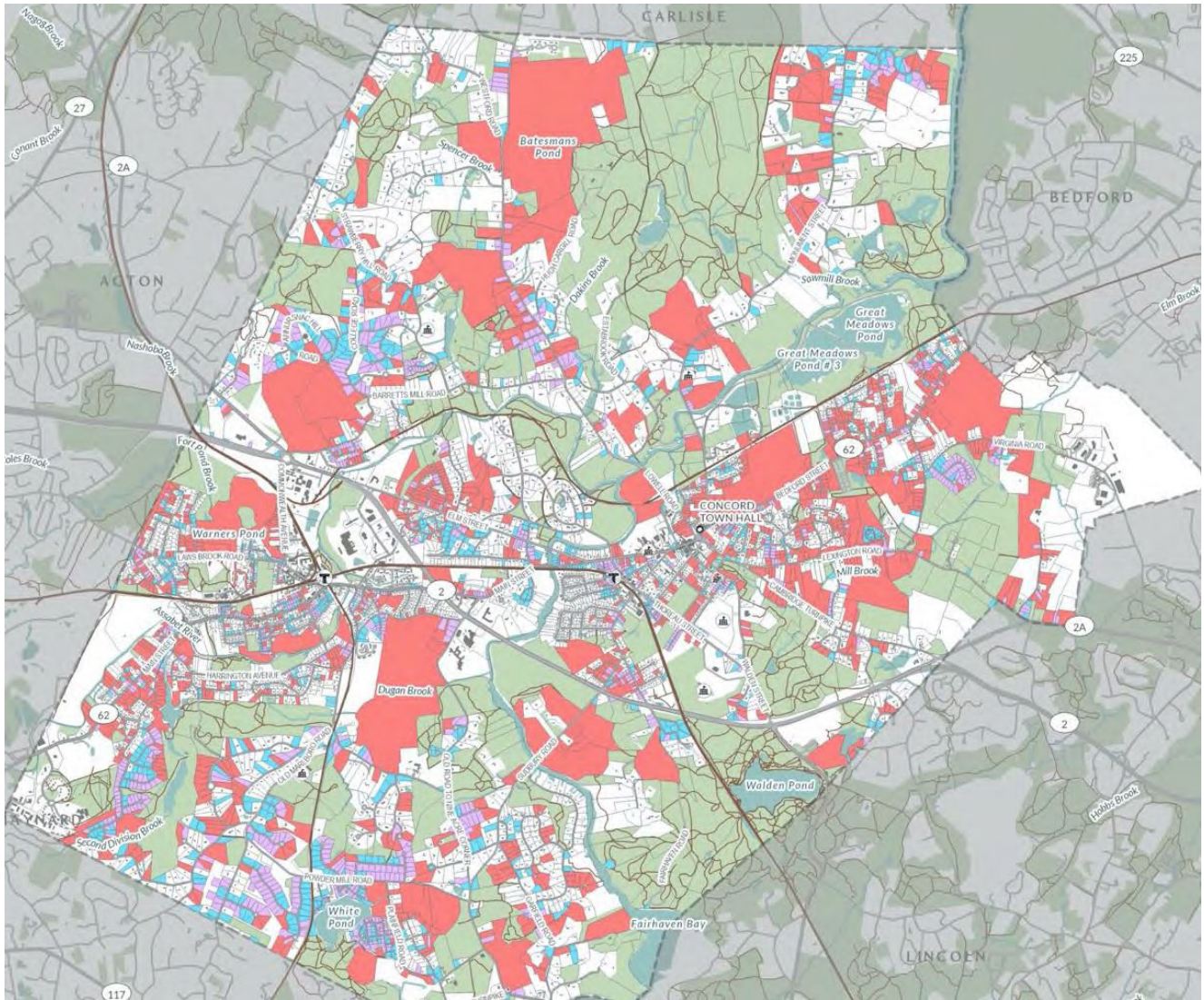
The Town's authority to update zoning regulations can have powerful effects on encouraging private responses to address local housing needs with minimal local expenditure. The following strategies incorporate recommendations for both local planning initiatives and zoning amendments.

5. CONSIDER AMENDING ZONING TO REDUCE THE MINIMUM LOT SIZE OR FRONTAGE REQUIREMENTS FOR ALL FORMS OF HOUSING, WHERE ENVIRONMENTAL CONDITIONS ALLOW.

Consider zoning amendments to allow smaller lot sizes and frontage requirements where there are soils suitable to handle on-site septic systems per Title 5 requirements. Large minimum lot sizes reduce the number of homes that can be built in Concord, a factor in making housing more expensive⁸. As the map below illustrates, Concord already has several residential areas that have estimated smaller lot sizes than what would be allowed under existing zoning rules.

⁸ Glaeser and Ward, 2009, "The causes and consequences of land use regulation: Evidence from Greater Boston."
https://scholar.harvard.edu/files/glaeser/files/the_causes_and_consequences_of_land_use_regulation_evidence_from_greater_boston_2009.pdf

Figure 5. Town of Concord Dimensional Compliance



6. RESEARCH EXAMPLES OF “GREEN” BUILDING DESIGN REQUIREMENTS AND ZONING REGULATIONS TO REQUIRE AND INCENTIVIZE “GREEN” BUILDING DESIGN THAT RESULTS IN OPTIMALLY SITED, SMALLER ENERGY, AND WATER-EFFICIENT HOMES POWERED BY RENEWABLE ENERGY.

Concord’s Climate Action and Resilience Plan (2020) lists “establish policies and incentives for new development to achieve high standards for sustainability and design” as well as “increase electrification and improve energy efficiency of residential buildings” as highly supported actions. As previously mentioned, Concord was one of the first ten communities to file a home rule petition for fossil fuel-free development, and as such looks to participate in DOER’s demonstration project authorized by Section 84 of Chapter 179 of the Acts of 2022. To facilitate Concord’s participation in DOER’s demonstration project, the Select Board is bringing a warrant article to the January 19, 2023 Special Town Meeting to adopt a bylaw to prohibit the expansion of fossil fuel infrastructure for new construction.



Figure 6. The Cambridge King Open and Cambridge Street Upper School Campus is Net Zero Ready (Photo by Robert Benson) www.mma.org

The multiple benefits of “green” buildings include significant savings in operating costs, better internal air quality, and significantly less external pollution. Feedback from focus groups and community forums indicates a strong interest in incentivizing and requiring “green” building design, even if it increases development cost for affordable housing.

There are few local Massachusetts examples in changing building codes or zoning bylaws that meet requirements of the state’s next-generation roadmap and Concord’s Climate Action and Resilience Plan. Boston and Cambridge have had success with their local regulations, while Brookline’s zoning bylaw to eliminate fossil fuels in new construction was also ruled as against state law by the Attorney General. The Town could look outside Massachusetts for regulatory examples from other states, and advocate for statewide “green building” requirements.

7. CONTINUE TO PROMOTE REDEVELOPMENT IN AREAS WHERE GOODS AND SERVICES ARE AVAILABLE, AND WHERE SIDEWALKS, BIKE LANES, AND PUBLIC TRANSPORTATION EXIST, SUCH AS THE CONCORD CENTER AREA, THOREAU DEPOT BUSINESS DISTRICT AND THE WEST CONCORD DEPOT AREA.

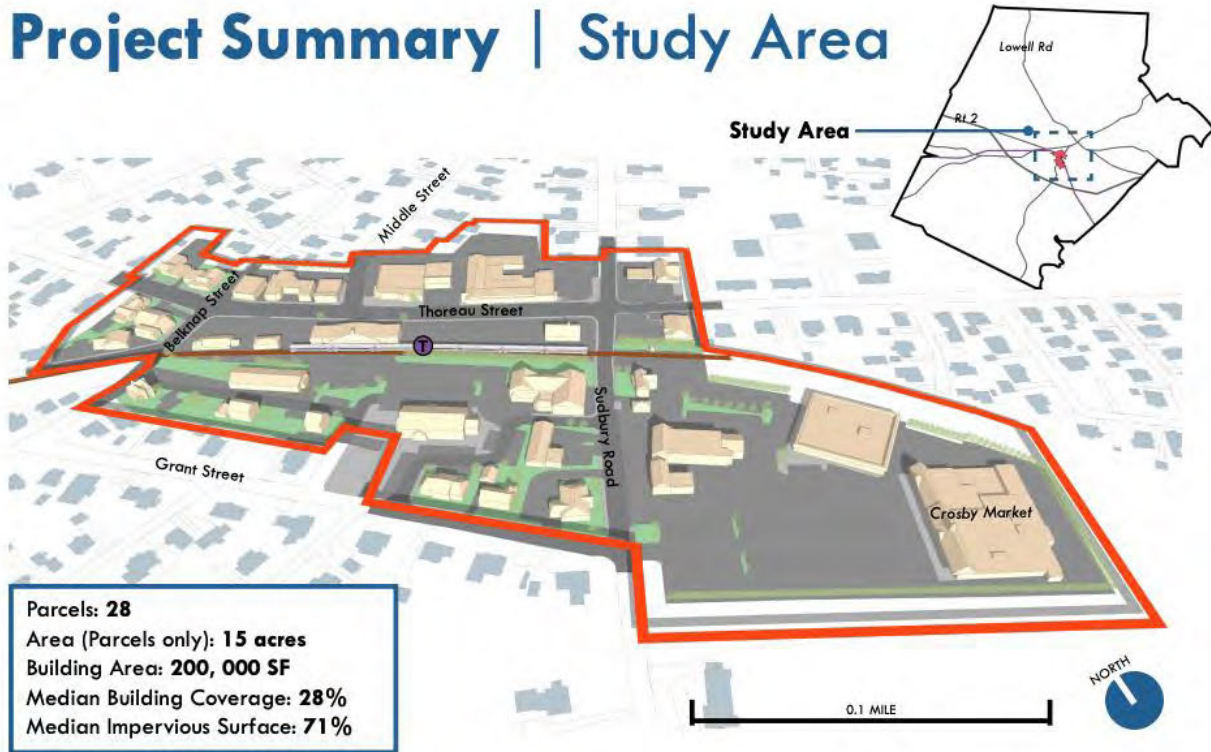
Background: In 2020, the Metropolitan Area Planning Council, together with the Town, developed a plan for the Thoreau Depot Business district. The Town’s 2018 Master Plan

proposed several recommendations that led to the Thoreau Depot Vision and Action Plan, including renewing and improving Concord's village centers, facilitating mixed-use development as appropriate, and improving public spaces and connectivity. Zoning amendments were drafted and presented at the annual Town Meeting during spring 2022.

Status: At the spring 2022 meeting, the proposed Zoning Bylaw amendment for the Thoreau Depot Business (TDB) District – which would have increased opportunities for developing mixed-use projects with a more defined affordable housing component – narrowly failed to pass (305 in favor / 366 opposed). The Planning Board should address relevant issues raised by opponents of the Thoreau Depot rezoning and consider proposing revisions to the zoning map and regulations that will encourage mixed use redevelopment, with a significant housing component, in this area. On a broader level, the Planning Board should continue advocating and studying the zoning and physical impediments to redevelopment of the TDB, West Concord Village, West Concord, and Concord Center Business Districts, to create the opportunity for a mixed-use, multi-family redevelopment that results in a more vibrant, walkable district. These zoning provisions should incorporate a balanced approach to inclusionary housing requirements, which will create a mix of affordable and market-rate housing and (wherever possible) comply with the State's MBTA Communities Multi-Family Zoning requirement. The TDB, West Concord Village, West Concord Business, and Concord Center Business districts are smart-growth and transit-oriented development locations due to their proximity to the commuter rail stations. A sub-strategy could be to rezone a portion of the Thoreau Depot Business District, such as east of Sudbury Road, if there is more public support for zoning passage.

Location: Business area surrounding the Thoreau Depot commuter rail station off Thoreau Street and Sudbury Road.

Figure 7 Site Diagram: 28 parcels containing 15 acres.



8. CONSIDER ZONING CONSISTENT WITH MBTA COMMUNITIES LAW, WITH INCLUSIONARY ZONING REQUIREMENTS ADDED (WEST CONCORD AND/OR THOREAU DEPOT STATIONS).

The central locations of Concord’s train stations and direct access to public transportation make it an ideal location to promote mixed-use and multi-family development that can accommodate affordable housing units. Concord’s current zoning does not meet the MBTA Communities economic development bill requirements. The zoning will need further changes to comply with the multi-family zoning requirement for the MBTA Communities economic development bill that was passed in 2021 (Section 3A of MGL c40a).

MBTA communities are required to have at least one zoning district of reasonable size (50 acres or more) in which multi-family housing is permitted as of right and meets other criteria set forth in the statute:

- Minimum gross density of 15 units/acre
- Not more than one-half mile from Concord's commuter rail station(s)
- No age restrictions
- Suitable for families with children
- Capacity requirement for up to 1094.25 new multi-family units

Commuter rail communities, like Concord, will be required to adopt a multi-family zoning district that meets all requirements of the compliance guidelines and is certified by DHCD – and this must be completed by December 31, 2024, or access to key state grant programs will be lost.

Regarding affordability requirements, DHCD’s August 2022 guidance document provides as follows:

Section 3A does not include any express requirement or authorization for an MBTA community to require affordable units in a multi-family housing project that is allowed as of right. It is a common practice in many cities and towns to require affordable units in a multi-family project that requires a special permit, or as a condition for building at greater densities than the zoning otherwise would allow. These inclusionary zoning requirements serve the policy goal of increasing affordable housing production. If affordability requirements are excessive, however, they can make it economically infeasible to construct new multi-family housing.

For purposes of making compliance determinations with Section 3A, DHCD will consider an affordability requirement to be consistent with as of right zoning if the zoning requires **not more than 10 percent of the units in a project to be affordable units**, and the cap on the income of families or individuals who are eligible to occupy the affordable units is **not less than 80 percent of area median income**.

In its October 2022 update, DHCD added that “In response to feedback from municipal leaders in several MBTA communities, DHCD is today making limited revisions to the Guidelines to address the circumstances in which an inclusionary zoning requirement will be deemed in compliance with the law. Those revisions:

- A. Modify the definition of “affordable unit” to eliminate the requirement that affordable units be eligible for listing on the Subsidized Housing Inventory. This modification gives communities the option to require a percentage of “workforce housing” units occupied by households earning more than 80% of area median income (AMI).
- B. Allow communities to set income limits for affordable units below 80% AMI, provided that a community demonstrates that a reasonable variety of multi-family housing types can be feasibly developed at the proposed affordability levels.
- C. Allow a community to require that more than 10% of the units in a project be affordable units (but not more than 20%), provided that the community demonstrates that a reasonable variety of multi-family housing types can be feasibly developed at the higher percentage. The demonstration of economic feasibility is now required for all inclusionary zoning requirements above the permitted 10% threshold, including those that pre-date the Guidelines.

D. Create an exception to the 20% cap on affordable units. The new exception applies only to previously approved and adopted 40R “smart growth” zoning districts. A community may amend an existing 40R district to comply with the Guidelines and retain an existing 25% affordable unit requirement.

These revisions to the Guidelines are intended to provide greater flexibility to MBTA communities committed to increasing multi-family housing production while meeting a local need for income-restricted units.”

Figure 8. West Concord Commuter Rail and Existing Housing Unit Density with Potential Areas for Affordable Housing Creation

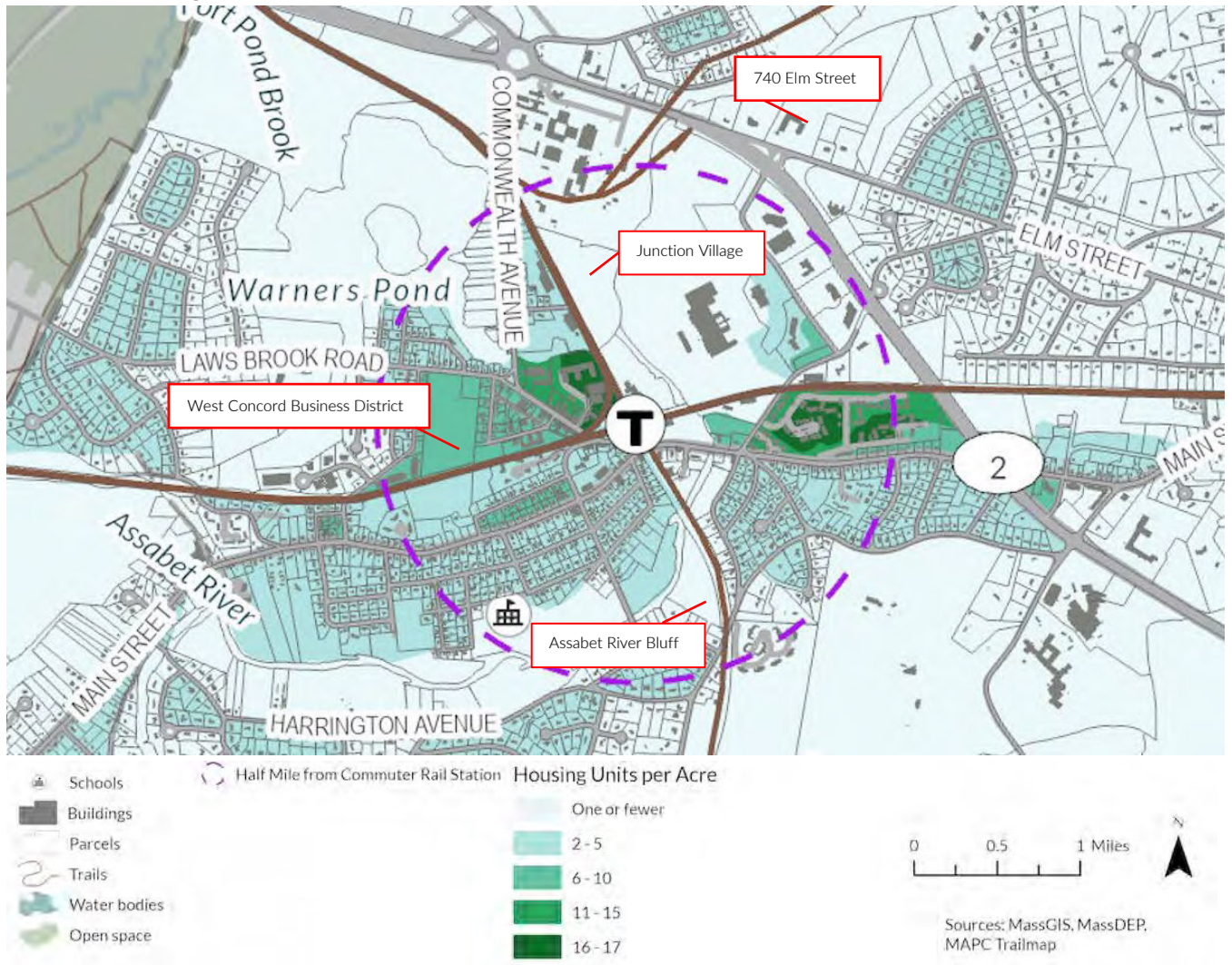
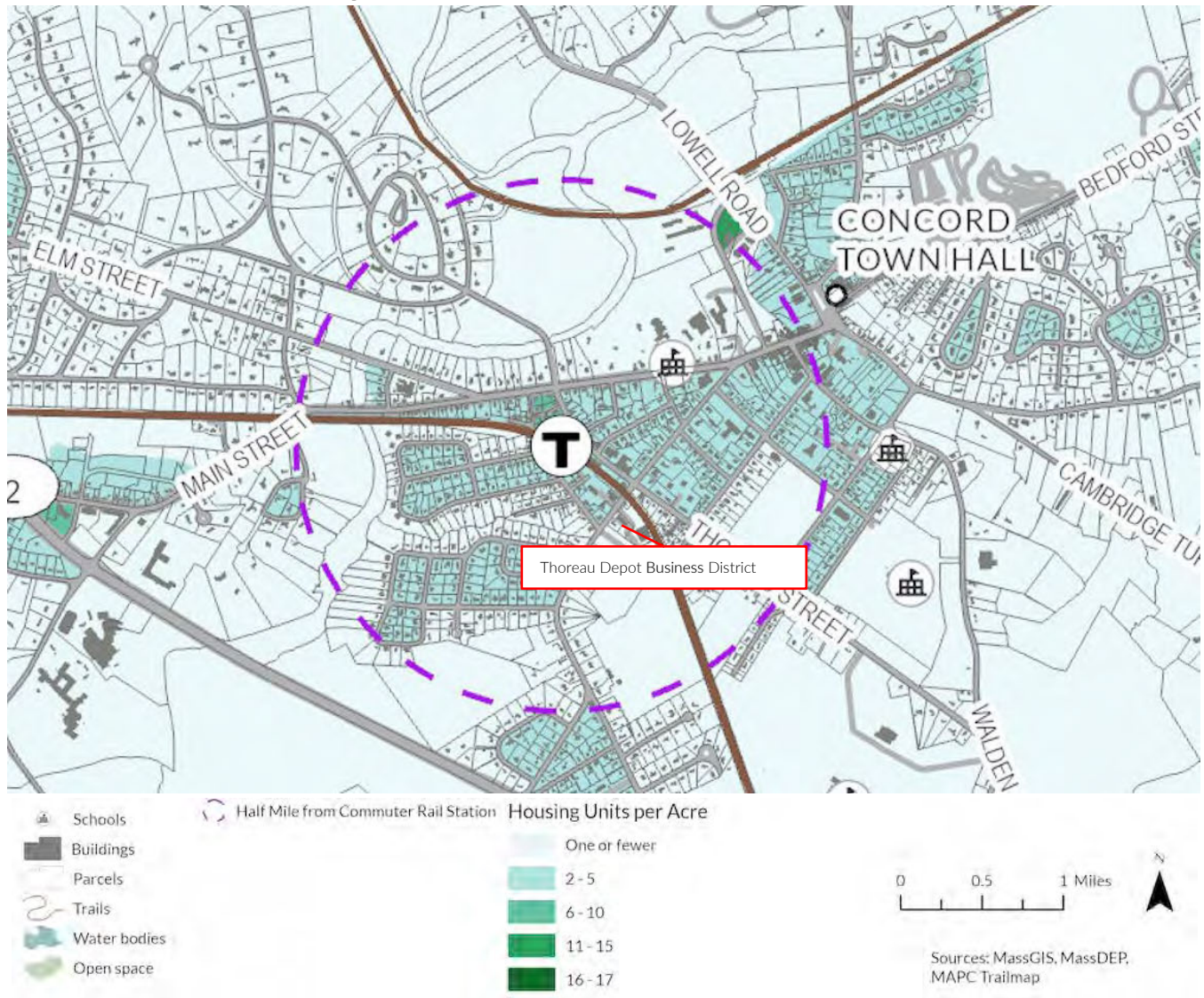


Figure 9. Thoreau Depot Commuter Rail Station and Existing Housing Unit Density with Potential Areas for Affordable Housing Creation



9. IDENTIFY STRATEGIES TO ENHANCE DIVERSITY, EQUITY, AND INCLUSION IN THE TOWN'S HOUSING PLANNING, POLICIES, AND ZONING BYLAWS.

The federal Fair Housing Act (FHAct) and Massachusetts law protect people from discrimination in housing based on the following protected classes: race, color, religion, sex, national origin, familial status, disability, marital status, and age⁹. Fair Housing laws also apply to zoning and planning practices. The FHAct prohibits municipalities and other local government entities from making zoning or land use decisions, or implementing land use policies, that exclude or otherwise discriminate against individuals protected by fair housing law, whether intentionally or by discriminatory effect.

Discriminatory effect can be established by showing that an action, such as a zoning decision, while facially neutral, has either an adverse impact on a minority group or causes harm to the community generally by the perpetuation of segregation. Zoning ordinances may not contain provisions that treat uses such as affordable housing, supportive housing, or group homes for people with disabilities differently than other similar uses, and municipalities may not enforce ordinances more strictly against housing occupied by members of protected classes¹⁰.

In 2021, the WestMetro HOME Consortium published an “Analysis of Impediments to Fair Housing Choice.” As a member of the WestMetro HOME Consortium, Concord has approved certain actions to further fair housing as listed below. Working with the Concord Diversity, Equity and Inclusion Commission (DEI), Concord plans to:

- Make a public commitment and develop materials to increase knowledge about fair housing, including holding an annual fair housing training and fair housing conference.
- Identify and address discriminatory actions in the private real estate market, including conducting fair housing testing.
- Provide information on fair housing responsibilities to first-time landlords, small property owners, realtors, and public and private housing developers.
- Review zoning ordinances, bylaws and practices that may encourage, unintentionally, discriminatory practices in permitting residential uses.
- Evaluate Local Preference policies.

⁹ Overview of Fair Housing Law, <https://www.mass.gov/service-details/overview-of-fair-housing-law>

¹⁰ Resources to affirmatively further fair housing, MAPC, 2018, <https://www.mapc.org/resource-library/zoning-to-affirmatively-further-fair-housing/>

- Establish written processes detailing intake procedures for the intake process for fair housing complaints and subsequent referral to MCAD, and publish on the town website.

Additionally, Concord will pursue the following local opportunities:

- Work with the DEI Commission to research and implement diversity, equity, and inclusion best practices in Town governance. Listen to diverse voices in the community and assess which additional DEI actions the Select Board should take.

10. STRENGTHEN BYLAW TO ALLOW DUPLEXES BY RIGHT IN ALL ZONES (WITH POSSIBLE EXCEPTION OF THE RESIDENCE AA DISTRICT DUE TO THE LACK OF SEWER ACCESS), WITH A RESTRICTION ON OVERALL MASSING AND SCALE.

Two-family houses (also known as duplexes) and townhouses provide alternatives to single-family houses at a scale that can be complementary to existing low-density suburban residential neighborhoods. Concord currently allows duplexes by special permit with a minimum lot area of 10,000 square feet in all residential districts and in some commercial districts. The Town would like to amend the zoning bylaw further to allow duplexes by right in all zones, with a restriction on overall floor area ratio (FAR) and appearance as a single-family home. In recent years, states like California and Oregon have eliminated single-family-exclusive zoning by allowing duplexes as of right.

Concord might evaluate expanding this strategy further to consider changes in areas zoned for single family homes on one- or two-acre lots to permit creation of three or four units in a single structure provided that the total structure does not exceed a maximum square feet in floor area, the proposed building meets all other relevant zoning and environmental ordinances, and the property has wastewater/septic capacity sufficient to meet Title 5 requirements for the number of units.

11. CONSIDER THE CREATION OF A TOWN-WIDE INCLUSIONARY ZONING BYLAW.

Inclusionary zoning links development of market-rate housing with production of affordable units using development incentives. Inclusionary zoning, which can apply Town-wide or be limited to select geographic areas, requires a minimum percentage of low- and moderate-income housing in new residential development of a certain type, such as new construction of multifamily housing or substantial rehabilitation.

Resources:

- Dixi Wu, “Inclusionary and Incentive Zoning in the Six New England States,” Joint Center for Housing Studies of Harvard University, 2021.¹¹
- Massachusetts Executive Office of Energy and Environmental Affairs, “Case Studies – Inclusionary Zoning”¹² which feature Dennis, Barnstable, and Newton, Massachusetts.
- DHCD has created a model inclusionary zoning bylaw.¹³
- *Inclusionary Zoning Guidelines for Cities and Towns* by the Massachusetts Housing Partnership Fund outlines legal considerations and choices for zoning programs.¹⁴

12. CONSIDER A HOME RULE PETITION TO ALLOW THE TOWN TO REQUIRE AFFORDABLE HOUSING IN BY-RIGHT SUBDIVISIONS OR PAY AN OPTION FEE.

It has not been ruled legal to require that, say, 10 percent of all lots in a by-right subdivision be set aside for affordable housing. Affordable housing can be legally mandated only pursuant to G.L. c. 40A, s.9, para. 2. Without statutory authorization, any other type of mandate would constitute an exaction. Concord could seek a home rule petition to provide the Town with the statutory authorization to require affordable housing in by-right subdivisions.¹⁵

LOCAL INITIATIVE AND PROGRAMMATIC STRATEGIES

Local initiative strategies refer to recommendations that the Town can undertake to foster the creation of more housing options, especially affordable housing. These initiatives are not regulatory in nature; rather, they deal with allocation of Town resources, including staff time, funding, and property.

13. CONTINUE FEASIBILITY AND ANALYSIS TO EVALUATE BARRIERS/CONSTRAINTS AND OPPORTUNITIES TO CREATE NEW UNITS ON CONCORD HOUSING AUTHORITY PROPERTIES, AND DESIGNATE CAPITAL FUNDING TOWARD CONSTRUCTION.

In June 2022, the Concord Housing Authority produced a preliminary assessment of potential for additional SHI units at existing CHA properties. The report identified the number of existing units, potential for additional units, obstacles, and recommended actions. The specifics are reported in the pipeline section. There is potential for eight to ten additional

¹¹ <https://www.jchs.harvard.edu/blog/inclusionary-and-incentive-zoning-six-new-england-states#:~:text=Almost%20200%20localities%20in%20all,the%20construction%20of%20affordable%20housing>.

¹² <https://www.mass.gov/service-details/case-studies-inclusionary-zoning>

¹³ <https://progov21.org/Download/Document/OU8N04>

¹⁴ https://www.mhp.net/writable/resources/documents/inclusionary_zoning_guidelines_netter.pdf

¹⁵ Ziegler, “Inclusionary Zoning: Lessons Learned in Massachusetts.” 2001.

units to be added across all properties, pending further study. These locations are shown in orange on the Subsidized Housing map (Figure 4).

Table 2. Housing Authority Preliminary Assessment of Potential SHI Units

#	Street	Existing, Potential	Potential	Obstacles	Recommended Action
399-401	Bedford Street	9 existing, 4 potential	Room for 4 more similar units if existing septic system removed and new units connected to Town sewer	Deed restricted to 8 units; previous 40B approval;	Study feasibility of connecting to Town sewer
405	Bedford Street	1 existing, 1-2 potential	Room for a backyard accessory unit, possibly a duplex	if existing septic system removed and new units connected to Town sewer	Study feasibility of connecting to Town sewer
1031	Main Street	1 existing, 1 potential	Remove garage and add SHI accessory dwelling	Town sewer capacity/ approval	Begin planning
156	Peter Spring Road	1 existing, 1 potential	Add 2 nd floor SHI unit	On-site septic system capacity	Possible future study
267-279	Walden Street	6 existing, 2 potential	Room for another duplex (2 SHI units) at back of property	Driveway access; flooding potential; Town sewer capacity/approval	Possible future study

Based on the findings of further Housing Authority feasibility study, designate capital cost funding toward construction of additional Housing Authority units.

14. STRENGTHEN THE COORDINATION, FUNDING, AND INTEGRATION OF AVAILABLE SOCIAL SERVICE PROGRAMS FOR LOW-INCOME RESIDENTS AND SENIORS, INCLUDING RESOURCES TO LIVE INDEPENDENTLY AND FUNDING REPAIRS TO MODEST VALUE HOMES FOR HEALTH AND SAFETY, HEALTH SERVICES, ETC.

Older adults can also face other challenges in single-family housing situations, such as routine maintenance and upkeep, cost of property taxes, access to services, and transportation. Concord assists older adult residents, veterans, and other vulnerable populations with housing costs including referring them to state or federal programs for fuel/heating, taxes, transportation, rent, and home efficiency and accessibility improvements.

As Concord's older adult population continues to grow, expand assistance to provide more support at a local level. Leverage state and other public/private programs to maximize such support and the creation of affordable, accessible, and service-enriched housing options, such as co-housing. The Executive Office of Elder Affairs (EOEA) maintains a list of supportive housing sites around the state (currently 41 sites, 6,060 units). Massachusetts also has a system of local Aging Service Access Points (ASAPs), which offer a regional partnership opportunity. Concord's regional organization is Minuteman Senior Services.

The CHDC sponsors a Small Grant Program that awards up to \$4,000 to Income-Eligible Concord residents (at or below 100 percent AMI) to make repairs and alterations to their homes for safety and health reasons. In its ten years of operations, the Small Grant Program has awarded 62 grants, totaling \$175,000, half of which were for senior households. This program supports existing low and moderate income households' ability to stay in their homes.

The CHDC currently has no revenue or income that can be directed toward the small grant program, and the program is at risk of terminating in the next year or two. This program is not CPA-eligible; thus, wherever it is not eligible under other funding programs, the Town can direct unrestricted funds to provide money for maintenance and rehabilitation of homes.

15. PROVIDE FUNDING SUPPORT TO THE CONCORD HOUSING DEVELOPMENT CORPORATION TO CREATE AND PRESERVE EXISTING AFFORDABLE UNITS.

In past years, the CHDC has worked with the Town to set aside CPA funding on a nearly annual basis, which assists with preserving existing affordable housing units subject to older restrictions that allow their resale at well above the current affordable levels. Should affordability be at risk with previously appropriated CPA funds, the Concord Housing Development Corporation is poised to preserve existing affordable units. Concord housing entities, such as the Trust or CHDC, intend to continue to purchase higher-priced units when they turn over to preserve these variable rates of affordability.

Community Preservation Act (CPA) funds will continue to be important resources to preserve existing units. This will continue to be an important function to ensure that existing affordable units are not converted to market-rate units and in the process, are removed from the Town's affordable housing stock and the State Subsidized Housing Inventory. Other sources of funding for affordable housing are the American Rescue Plan Act (ARPA), Free Cash, and HOME funds.

16. EXAMINE USING THE BORROWING POWERS OF THE COMMUNITY PRESERVATION ACT TO FUND AND SUPPORT A LARGER AFFORDABLE HOUSING PROJECT.

Since 2006, the Community Preservation Committee has appropriated a total of \$27.1 million across all CPA categories, with 22 percent spent toward community housing per the 2020 CPA plan. In 2021, the Town funded an update to the Housing Production Plan (\$30,000), participation in the Regional Housing Services Program (\$25,000), and an Affordable Housing Buy-Down program (\$233,888). In 2022, \$300,000 in CPA funds were used towards the acquisition of the 1-acre Assabet River Bluff property for community housing. Given the Town's likely drop below 10 percent on the state SHI in May 2023, this borrowing opportunity may be explored.

17. THE SELECT BOARD SUPPORTS THE CONCORD MUNICIPAL AFFORDABLE HOUSING TRUST (CMAHT) BY CONTINUING TO SEEK FUNDING AT TOWN MEETING THROUGH COMMUNITY PRESERVATION ACT, ARPA, AND FREE CASH FUNDING; AND BY CONTINUING TO SEEK STATE AUTHORIZATION FOR REAL ESTATE TRANSFER FEE AND BUILDING PERMIT SURCHARGE TO FUND THE TRUST, INCLUDING PROFESSIONAL RESOURCES NEEDED TO CARRY OUT AN EXPANDED MISSION.

In its October 2018 "Preliminary Report to the Concord Select Board," the Affordable Housing Funding Committee (AHFC) states: "Concord needs predictable, sustainable revenue sources so that funds are readily available when affordable home opportunities arise. Much of the development of affordable homes is opportunistic, occurring when a suitable property becomes available. Without the necessary funds to act quickly, valuable opportunities could be missed." To accomplish this, the 2019 Town Meeting approved AHFC's recommendations to accept the Municipal Affordable Housing Trust state statute, authorize the filing of two home rule petitions to fund the trust, and approve an initial annual appropriation of \$500,000 for the Trust. The home rule petitions filed for a real estate transfer fee and a building permit surcharge were refiled for the 2021-2022 legislation session. Both bills are still pending in state legislature (as of 2022), were reported out favorably by committee; but not enacted by either the house or senate; and will need to be refiled for the 2023-2024 legislative session.

The Concord Municipal Affordable Housing Trust has recommended that the Select Board insert onto the warrant for the January 19, 2023 Special Town Meeting two articles to authorize for the state legislative session convening in January 2023 the home rule petitions filed previously for a real estate transfer fee (S.2437) and a building permit surcharge (S.2438) to fund the Trust, amended as follows: (1) to provide that all funds from both special acts be deposited in the "Concord Municipal Affordable Housing Trust"; (2) to add the Trust to the list of local entities exempt from the real estate transfer fee; (3) to amend the portion of the purchase price subject to the real estate transfer fee from "exceeding \$600,000" to "exceeding \$1,000,000"; (4) to define affordable housing income limits for both special acts as being at or below 150% of area median income; and (5) to provide for acceptance of either special act by vote at an annual or special town meeting.

Should the home rule petitions for a real estate transfer fee and a building permit surcharge be enacted by the state, and then approved by Concord Town Meeting, an estimated \$2.2-\$2.4 million per year would be available to the CMAHT. This high level of sustained funding would require dedicated professional resources to carry out the Trust's expanded mission

In 2019, 2020, 2021, and 2022 the CMAHT received \$500,000 in interim funding at Town Meeting, totaling \$2 million. Funding should continue to be allocated for the CMAHT at Town Meeting, including through Free Ccash, CPA, HOME, and ARPA funds. CMAHT is not making a request for another \$500,000 at Town Meeting 2023, if the \$2,000,000 from Junction Village is put in the Trust in 2022-2023.

CAPACITY, COORDINATION, AND EDUCATION

The following strategies are recommended for expanding the Town's capacity to implement housing initiatives through staffing and infrastructure, coordination with other local or regional entities, and education.

18. CONTINUE TO HOST AND SUPPORT MEMBERSHIP IN THE REGIONAL HOUSING SERVICES OFFICE.

The Regional Housing Services Office (RHSO) is a collaboration between the nine member towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, and Weston. The RHSO was formed in 2011 through an Inter-Municipal Agreement (later amended), assisted by the Metropolitan Area Planning Council (MAPC) who is the regional planning agency for Greater Boston. The RHSO serves its member towns by assisting with the municipal function of affordable housing, including proactive monitoring, program administration, project development, and resident assistance. Because of the RHSO staff's expertise and the intermittent nature of affordable housing work, the monitoring, administration, development, and assistance is delivered more efficiently and effectively. The Town of Concord, which is the Lead Community, hosts the RHSO at its office and employs RHSO staff.

The RHSO currently supports the CHDC and will support the Concord Municipal Affordable Housing Trust (CMAHT) nominally starting in FY24, through part-time staff support. In general, interviewees felt positively about the Trust, but since it is very new, several people discussed the need for more dedicated staffing. Sustaining a level of professional capacity is critical to the effectiveness of the Town's efforts to implement community priorities as established through this planning effort. If the real estate transfer fee were to be enacted, the anticipated level (\$2.2 million) of annual sustained funding would require a full-time staff

support for the Trust. For example, hiring an Affordable Housing Director to assist the Town and Trust with their programs and initiatives.

19. EXPLORE OPPORTUNITIES FOR STRATEGIC SEWER, PEDESTRIAN/BICYCLE CONNECTIONS, AND OTHER NECESSARY INFRASTRUCTURE EXPANSION TO ALLOW DENSER DEVELOPMENT IN SMART-GROWTH LOCATIONS AROUND VILLAGE CENTERS AND AFFORDABLE HOUSING DEVELOPMENTS.

In 2007, an integrated wastewater capacity and planning initiative was undertaken due to capacity constraints identified within the existing wastewater treatment plant (WWTP), , culminating in a report titled, "The Status of Municipal Wastewater Treatment in Concord, Massachusetts," which concluded that there was insufficient treatment capacity available within the existing WWTP to accommodate future development or redevelopment within the existing sewer area.

The Wastewater Task Force was formed in 2008 to address the report's findings and evaluate how the Town should proceed. The Task Force determined that the Town needed to increase its municipal sewer capacity from 320,000 to 598,000 gallons per day to meet existing needs and anticipated development, respectively, over the next 20 years. The Task Force developed a plan to allow for the use of the remaining capacity, with a provision that new users will provide funding required to expand Concord's facilities when needed. As an interim measure, the Public Works Commission, acting as sewer commissioners, also adopted stringent regulations for extending and expanding sewer service.

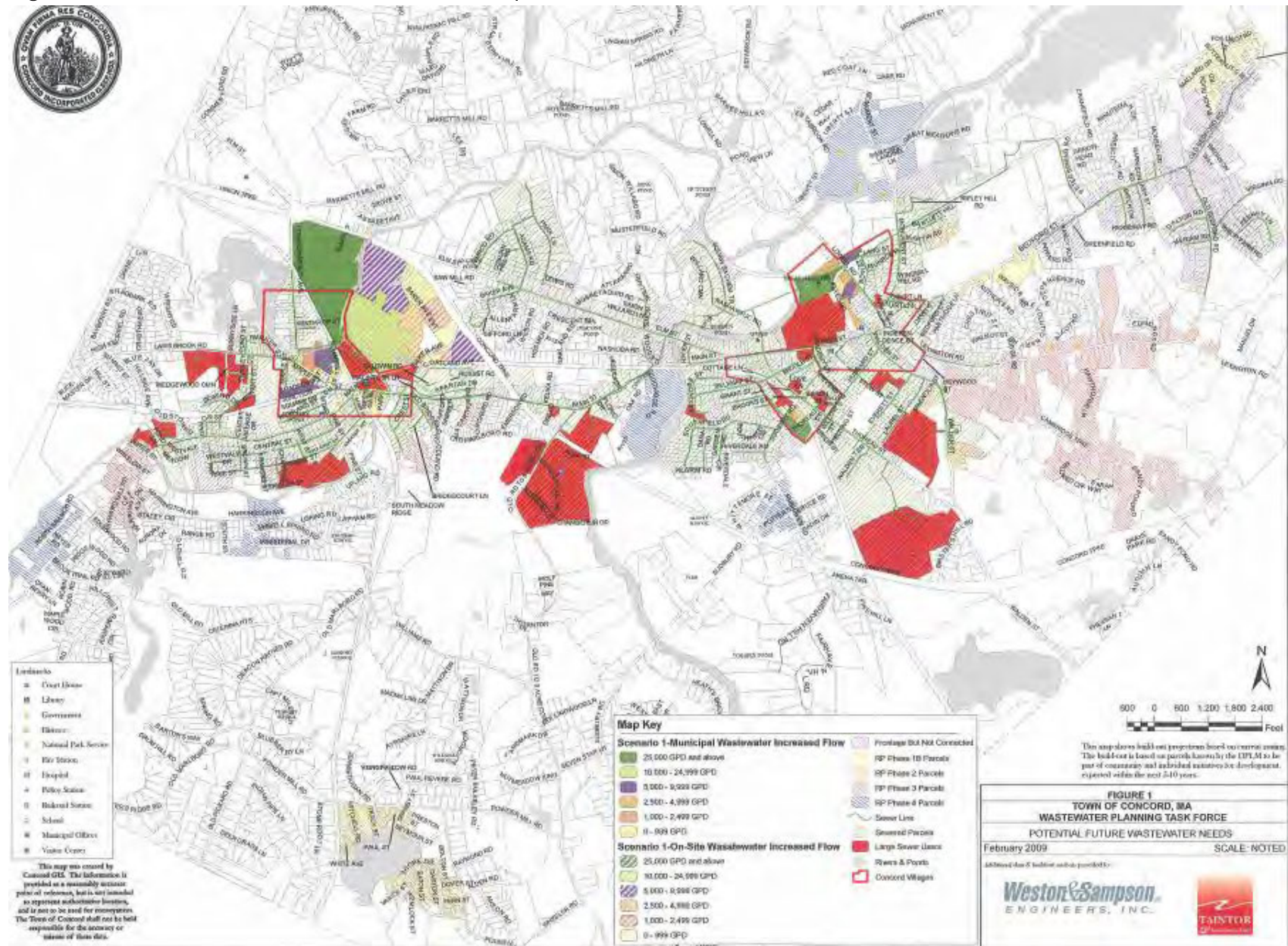
The Integrated Planning Policy Statement in the 2007 "Status of Municipal Wastewater Treatment in Concord, MA" report emphasizes the importance of ensuring the Town's capacity to provide wastewater services help achieve its other related planning goals such as affordable housing¹⁶. The Public Works Commission has adopted a policy to allow exceptions to the existing stringent regulations on extending and expanding sewer service in cases where 100% of a development is dedicated for affordable housing, when supported by other town boards and committees in very small affordable housing developments.

The Town, through the Select Board and the Public Works Commission, and with input from the Planning Board, may want to revisit the 2007 Status Report and examine actions to be taken to expand and extend sewer capacity for the town. This will be a multi-year process, with public engagement, and ultimately a request for funding to Town Meeting.

¹⁶ Integrated Planning Policy Statement, <https://www.concordma.gov/DocumentCenter/View/946/Policy-Statement-PDF>

The Town of Concord is also in the process of developing a Complete Streets Program to improve the transportation network for all modes by safely connecting home, work, school, shopping, dining, recreation and more. Concord drafted its Complete Streets Prioritization Plan in 2019, which can be viewed on the Town's website.

Figure 10. Town of Concord Massachusetts Comprehensive Wastewater Treatment Plan: Recommended Areas¹⁷



20. CONTINUE TO PARTICIPATE IN THE WEST METRO HOME CONSORTIUM.

The HOME Investment Partnerships Program is the largest federal block grant to state and local governments, and it was designed exclusively to create affordable housing for low-income households. The WestMetro HOME Consortium includes the following 13 municipalities: Bedford, Belmont, Brookline, Concord, Framingham, Lexington, Natick, Needham, Newton, Sudbury, Waltham, Watertown, and Wayland. Concord joined in 2010 and receives an annual allocation of funds for affordable housing projects. Concord also has access to pooled HOME funds awarded through an annual RFP process.

21. CONTINUE PARTICIPATING IN THE LOCAL OPTION FOR HOUSING AFFORDABILITY COALITION TO PETITION THE LEGISLATURE FOR HOME RULE OR OTHER STRATEGIES TO PROVIDE LONG-TERM FUNDING FOR THE CMAHT (REAL ESTATE TRANSFER FREE AND BUILDING PERMIT SURCHARGE).

The Local Option for Housing Affordability (LOHA) Coalition is working to create and support affordable housing with a real estate transfer fee. The LOHA Coalition is composed of the following cities and towns: Boston, Concord, Somerville, Nantucket, Brookline, Provincetown, Chatham, Cambridge, and Arlington. It also includes about one hundred organizational members. A real estate transfer fee and building permit surcharge would provide an estimated \$2.6 million per year to the CMAHT. Both bills, still pending in state legislature, reported out favorably by committee in 2022. Concord should refile, and keep refiling, its home rule petition for the transfer fee and the permit surcharge in case the state-wide legislation does not pass. More information: www.realestatetransferfee.org.



22. CONTINUE INTEGRATED HOUSING COLLABORATION WITH THE SELECT BOARD, PLANNING BOARD, CHDC, CMAHT, CHA, CHF, AND COMMUNITY PRESERVATION COMMITTEE THROUGH THE CONCORD HOUSING ROUNDTABLE AND OTHER FORUMS, CLARIFYING AND TRACKING THE STATUS AND RESPONSIBILITIES FOR HOUSING PRODUCTION PLAN IMPLEMENTATION.

The Concord Housing Roundtable was developed to assist its various municipal housing groups in coordination and collaboration. The Concord Housing Authority, Concord Housing Foundation, Concord Housing Development Corporation, and Concord Municipal Affordable Housing Trust convene quarterly to discuss local housing issues and to build solutions. The Community Preservation Committee, Select Board, and Planning Board are other groups with housing responsibilities, that should continue to be invited to Roundtable meetings. Other forums might be useful to clarify the roles and responsibilities for Housing Production Plan

implementation, as well as track progress on the strategies, including discussion on staffing and professional support is required to implement the plan.

23. CONTINUE AFFIRMATIVE OUTREACH TO TARGET POPULATIONS [LOW-INCOME, SENIORS, BIPOC (BLACK, INDIGENOUS, AND PEOPLE OF COLOR), CONCORD EMPLOYEES] TO INCREASE AWARENESS OF EXISTING AFFORDABLE HOUSING PROGRAMS AND ASSISTANCE AT LOCAL AND STATE LEVELS.

The Town should undertake concerted efforts to provide ongoing outreach to target populations to increase awareness of existing affordable housing programs and assistance at local and state levels. Some possible methods for consideration include¹⁸:

- Translate information on affordable housing programs and assistance in multiple languages.
- Identify networks and nearby organizations serving people of color, immigrant groups, low-income families, veterans, and other protected classes; they may share information with their members, and/or provide language assistance or volunteers.
- Faith-based organizations in Concord can provide leads on specific outreach and service programs they offer.
- Advertise through local and regional social media and newspapers (Kidon Media lists national and statewide ethnic newspapers).
- Connect with the local hospital to distribute outreach materials.
- Include educational institutions on the outreach list. School social workers and parent-teacher organizations are good sources for spreading information among parents.

24. FOSTER OUTREACH AND EDUCATION ABOUT LOCAL AND REGIONAL AFFORDABLE HOUSING NEEDS THROUGH A POSITIVE PUBLIC RELATIONS CAMPAIGN.

The Town of Concord should build a volunteer group or subcommittee tasked with developing and implementing a marketing strategy surrounding the Town's housing. By working collaboratively with its local and regional housing partners, the Town can enhance and promote community education and create heightened transparency regarding the Town's subsidized housing status, and the consequences of falling below 10 percent on the SHI.

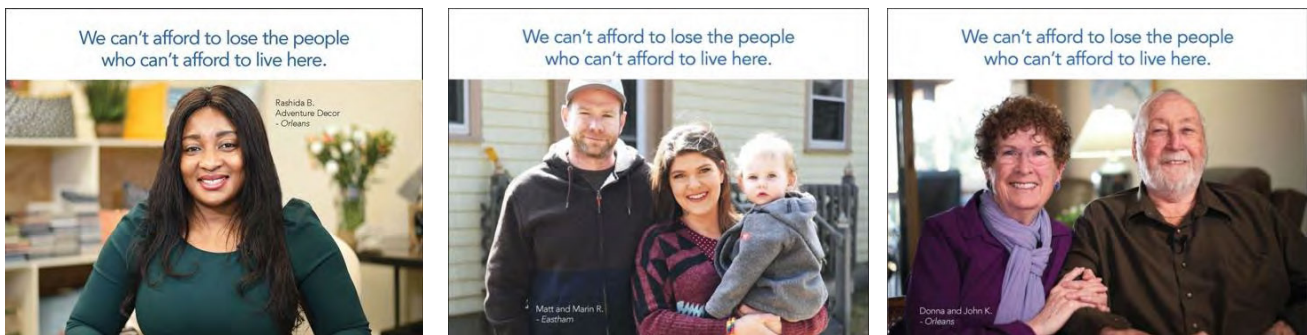
Responsibilities may include:

- Applying for marketing grants
- Designing informational brochures and graphic signage for public spaces throughout the Town

¹⁸ MAPC Affirmative Marketing, <https://www.mapc.org/resource-library/affirmative-marketing/>

- Hosting public forums and panels with guest speakers who can talk about the national housing crisis
- Tabling at Concord community events
- Submitting editorials and press releases to local news agencies
- Developing a curriculum for presentations to K12 classrooms, civic groups, and municipal boards/committees

A regional example of such a campaign was launched by the Lower Cape Community Housing Partnership, which was built by the Community Development Partnership to garner public support for affordable housing. Since launching, they have trained 141 municipal officials on affordable housing issues and strategies, and they've had 98 residents participate in their advocacy training program. Moreover, the Lower Cape Community Housing Partnership launched a media campaign to tell the stories of Lower Cape residents benefiting from affordable housing initiatives.¹⁹



¹⁹ <https://capecdp.org/affordable-housing/community-housing-partnership/media-campaign>

ACTION PLAN

The matrix below provides a more specific assignment of the responsible entity, supporting entity, and timeframe to implement each housing strategy.

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
1	THE CHDC CREATES SHI UNITS AT ASSABET RIVER BLUFF.									
	Timeframe: Short and Mid-Term Implementation Lead: CHDC Implementation Support: CMAHT, CPC, CHF									
2	THE CHDC PURSUES THE CREATION OF SHI UNITS AT (JUNCTION VILLAGE).									
	Timeframe: Long-term Implementation Lead: CHDC Implementation Support: CPC, CMAHT, CHF, SB									
3	CMAHT PURSUES OTHER LAND FOR THE CREATION OF AFFORDABLE HOUSING.									
	Timeframe: Ongoing Implementation Lead: CMAHT Implementation Support: CHDC, SB, CPC									

SB = Select Board CMAHT = Concord Municipal Affordable Housing Trust PB = Planning Board
 CPC = Community Preservation Committee CHDC = Concord Housing Development Corporation
 RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 – PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
4	CMAHT NEGOTIATES INCREASED AFFORDABLE UNITS IN PRIVATELY DEVELOPED PROJECTS.									
	Timeframe: Ongoing Implementation Lead: CMAHT Implementation Support: SB, CPC, Planning Board, Town staff									
5	CONSIDER AMENDING ZONING TO REDUCE THE MINIMUM LOT SIZE OR FRONTAGE REQUIREMENTS.									
	Timeframe: Mid-term Implementation Lead: PB Implementation Support: Town staff									
6	RESEARCH EXAMPLES OF “GREEN” BUILDING DESIGN REQUIREMENTS AND ZONING REGULATIONS.									
	Timeframe: Short-term Implementation Lead: PB, SB Implementation Support: Town staff, CAAB									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
7	PROMOTE REDEVELOPMENT IN AREAS WHERE GOODS AND SERVICES ARE AVAILABLE NEAR TRANSPORTATION.									
	Timeframe: Ongoing Implementation Lead: PB Implementation Support: Town Staff									
8	ZONING CONSISTENT WITH MBTA COMMUNITIES LAW.									
	Timeframe: Mid-term Implementation Lead: PB, SB Implementation Support: Town staff									
9	IDENTIFY STRATEGIES TO ENHANCE DIVERSITY, EQUITY, AND INCLUSION IN THE TOWN'S HOUSING PLANNING, POLICIES, AND ZONING BYLAWS.									
	Timeframe: Short-term Implementation Lead: SB Implementation Support: DEI Commission, Town staff, CMAHT									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
10	STRENGTHEN BYLAW TO ALLOW DUPLEXES BY RIGHT IN ALL ZONES.									
	Timeframe: Mid-term Implementation Lead: PB Implementation Support: Town staff									
11	CONSIDER THE CREATION OF A TOWN-WIDE INCLUSIONARY ZONING BYLAW.									
	Timeframe: Mid-term Implementation Lead: PB Implementation Support: Town staff, CMAHT									
12	CONSIDER A HOME RULE PETITION TO ALLOW THE TOWN TO REQUIRE AFFORDABLE HOUSING IN BY-RIGHT SUBDIVISION CREATION OR PAY AN OPTION FEE.									
	Timeframe: Mid-term Implementation Lead: SB, PB Implementation Support: Town staff, CMAHT									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
13	ANALYSIS TO CREATE NEW UNITS ON CONCORD HOUSING AUTHORITY PROPERTIES.									
	Timeframe: Ongoing Implementation Lead: CHA Implementation Support: RHSO, Town staff									
14	STRENGTHEN THE COORDINATION, FUNDING, AND INTEGRATION OF AVAILABLE SOCIAL SERVICE PROGRAMS.									
	Timeframe: Short and Mid-term Implementation Lead: Human Services Dept, CHDC. Implementation Support: CPC, Town staff									
15	FUNDING SUPPORT TO THE CONCORD HOUSING DEVELOPMENT CORPORATION.									
	Timeframe: Ongoing Implementation Lead: CHDC Implementation Support: CPC, CMAHT, SB, Town staff									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING N	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
16	EXAMINE USING THE BORROWING POWERS OF THE COMMUNITY PRESERVATION ACT.									
	Timeframe: Short-term Implementation Lead: CPC Implementation Support: CHDC, CMAHT									
17	SELECT BOARD SUPPORT CONCORD MUNICIPAL AFFORDABLE HOUSING TRUST (CMAHT) BY CONTINUING TO SEEK FUNDING									
	Timeframe: Ongoing Implementation Lead: CMAHT Implementation Support: SB, CPC									
18	CONTINUE TO HOST AND SUPPORT MEMBERSHIP IN THE REGIONAL HOUSING SERVICES OFFICE									
	Timeframe: Ongoing Implementation Lead: SB Implementation Support: CPC, Town Staff									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
19	EXPLORE OPPORTUNITIES FOR EXPANDING STRATEGIC SUPPORTIVE INFRASTRUCTURE FOR HOUSING.									
	Timeframe: Ongoing Implementation Lead: SB, PB Implementation Support: Town staff, Wastewater Task Force									
20	CONTINUE TO PARTICIPATE IN THE WEST METRO HOME CONSORTIUM.									
	Timeframe: Ongoing Implementation Lead: SB Implementation Support: Town staff									
21	CONTINUE PARTICIPATING IN THE LOCAL OPTION FOR HOUSING AFFORDABILITY COALITION.									
	Timeframe: Ongoing Implementation Lead: CMAHT Implementation Support: SB									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

#	Housing Strategies	GOAL 1 - PRODUCTION GOAL	GOAL 2 - SUPPORT HEALTHY AGING	GOAL 3 - SMART GROWTH HOUSING	GOAL 4 - DEVELOPMENT CONSIDERS CLIMATE CHANGE	GOAL 5 - STABILIZING HOUSING FOR VULNERABLE RESIDENTS	GOAL 6 - SMALLER HOME PRESERVATION/ CONSTRUCTION	GOAL 7 - DEI OUTREACH AND EDUCATION AND FAMILY HOUSING	GOAL 8 - STRENGTHEN PARTNERSHIPS	GOAL 9 - PRESERVE LONG-TERM AFFORDABILITY
22	CONTINUE HOUSING COLLABORATION									
	Timeframe: Short-term Implementation Lead: CMAHT Implementation Support: SB, CHA, CHF, CHDC, CPC, PB									
23	CONTINUE AFFIRMATIVE OUTREACH TO TARGET POPULATIONS.									
	Timeframe: Short-term Implementation Lead: SB Implementation Support: DEI, CMAHT									
24	FOSTER OUTREACH AND EDUCATION ABOUT LOCAL AND REGIONAL AFFORDABLE HOUSING NEEDS THROUGH A POSITIVE PUBLIC RELATIONS CAMPAIGN.									
	Timeframe: Short-term Implementation Lead: SB to assign and delegate Implementation Support: DEI, CHA, CHF, CHDC, CPC, RHSO, Town staff, CMAHT									

SB = Select Board **CMAHT** = Concord Municipal Affordable Housing Trust **PB** = Planning Board
CPC = Community Preservation Committee **CHDC** = Concord Housing Development Corporation
RHSO = Regional Housing Services Office
Ongoing: Continuous, every year **Short-term:** 0-2 years **Mid-term:** 3-5 years **Long-term:** 5-10 years

CHAPTER 3: DEMOGRAPHIC PROFILE

An analysis of local demographic data and housing stock reveals key characteristics and trends in Concord that help explain housing need and demand. To understand how the town compares to its neighbors, Concord data is compared to other municipalities in the RSHO region (Acton, Bedford, Lexington, Lincoln, Maynard, Sudbury, Wayland, and Weston), and to the bordering town of Carlisle that is part of the regional Concord/Carlisle High School, and finally to Middlesex County and Massachusetts. The information in this section provides the framework for the housing production goals and strategies crafted to address local housing concerns.

This Housing Production Plan is grounded in a thorough examination of Concord's demographic makeup. An analysis of the current population, household composition, race and ethnicity, and educational attainment provides insight into existing housing need and demand. Projections of Concord's future residential composition help inform housing planning efforts.

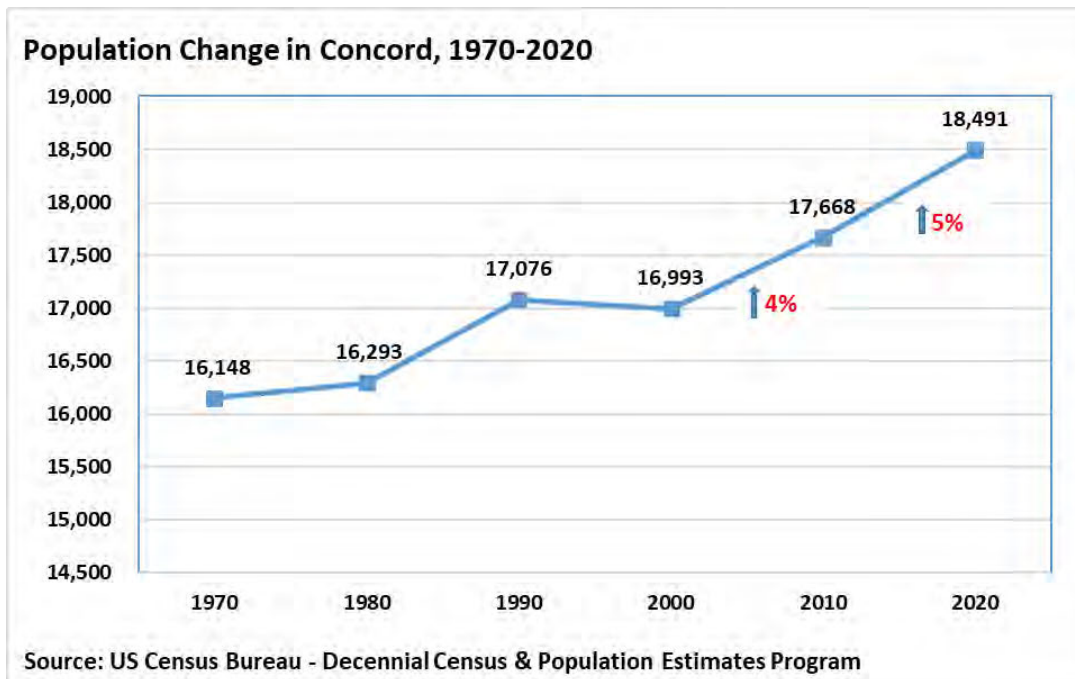
KEY FINDINGS

- Concord has had more substantial population growth in the past two decades than in prior recent decades. Following a population boom between 1960 and 1970, population growth was modest for a few decades, but has grown 9% between 2000 and 2020.
- The percentage of white residents in Concord dropped from 91.6% in 2000 to 83% in 2020. The number of residents who identify as “other” or mixed race has seen the most growth – from 549 residents in 2000 to 1,501 residents in 2020. There was a decrease in the percentage of Black or African-American residents between 2010 and 2020 – from 3.8% of Concord's population in 2010, to 3% in 2020.
- Younger households comprise a smaller and smaller percentage of Concord's population. Older households (55+) were a little less than half (46%) of Concord's population in 2000, but were 57% of households in 2010, and 61% of households in 2020.
- Household size is increasing, as well as the number of non-family households.
- Although 70% of Concord's households have incomes over 100,000, 25% (1,619) of households have incomes less than \$75K. The great majority of lower income households are 65+.

DEMOGRAPHICS

POPULATION

Following a population boom between 1960 and 1970, population growth in Concord was modest for a few decades, but increased more substantially between 2000 and 2020. Concord's population grew 4% between 2000 and 2010, and another 5% between 2010 and 2020. This growth exceeded projections that the Metropolitan Area Planning Council (MAPC) made in 2014 and which were used in Concord's 2015 HPP. Concord's population growth has also exceeded more recent 2018 projections from UMass Donahue Institute. Concord's 2020 population is already higher than both these entities had predicted for 2030. Since no other population projections are available, we will not be using projections in this report.



Nearly every age cohort has seen a growth in population in the last decade. However, the largest group – 35-54 year olds – saw a 6% decrease in population. The youngest cohort and two of the oldest cohorts are the groups that saw the greatest percentage increase between 2010 and 2020. Children ages 0 through 4 grew 43% in the last decade, adults ages 55-64 grew by 18%, and adults ages 65-74 grew by 23%.

Population Change by Age in Concord						
Age	1990	2000	2010	2020	Change 2010-2020	% Change 2010-2020
0-4	966	979	748	1,071	323	43%
5-19	2,920	3,518	3,533	3,879	346	10%
20-34	3,666	1,893	1,804	1,951	147	8%
35-54	5,366	5,921	5,441	5,095	-346	-6%
55-64	1,892	1,872	2,596	3,064	468	18%
65-74	1,238	1,406	1,577	1,939	362	23%
75+	1,028	1,404	1,969	1,951	-18	-1%

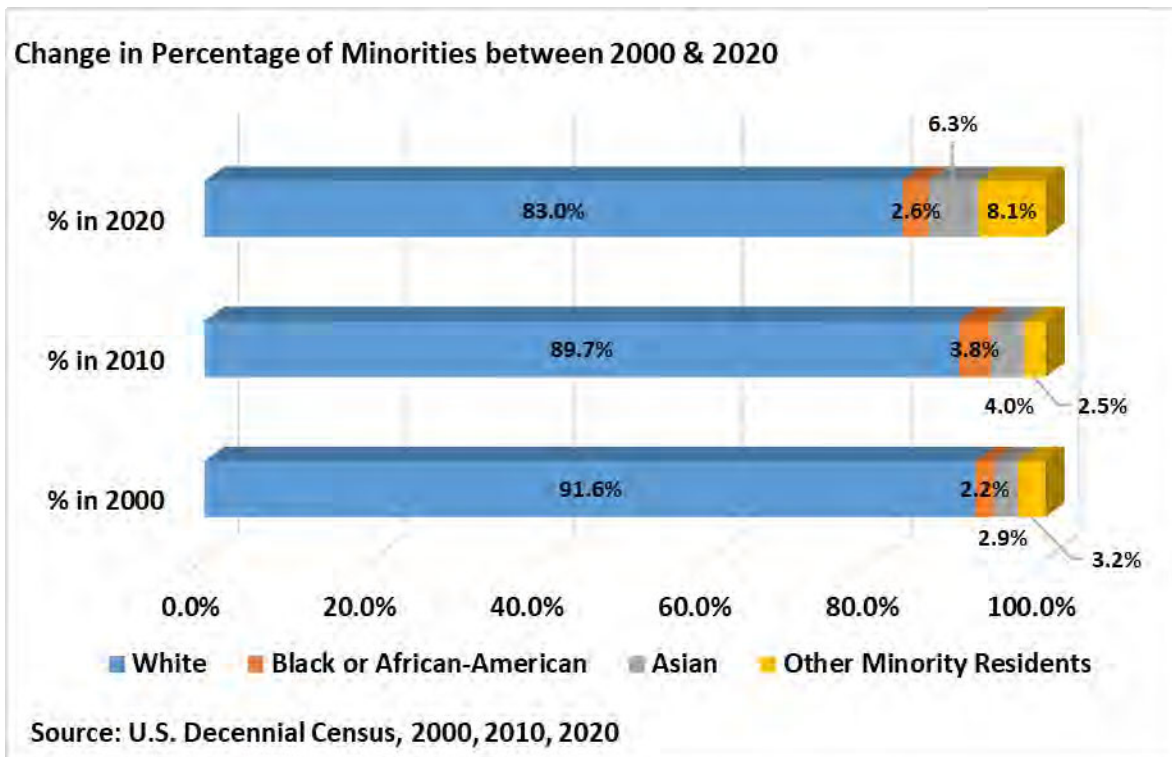
Source: US Decennial Census & 2020 American Community Survey

RACE & ETHNICITY

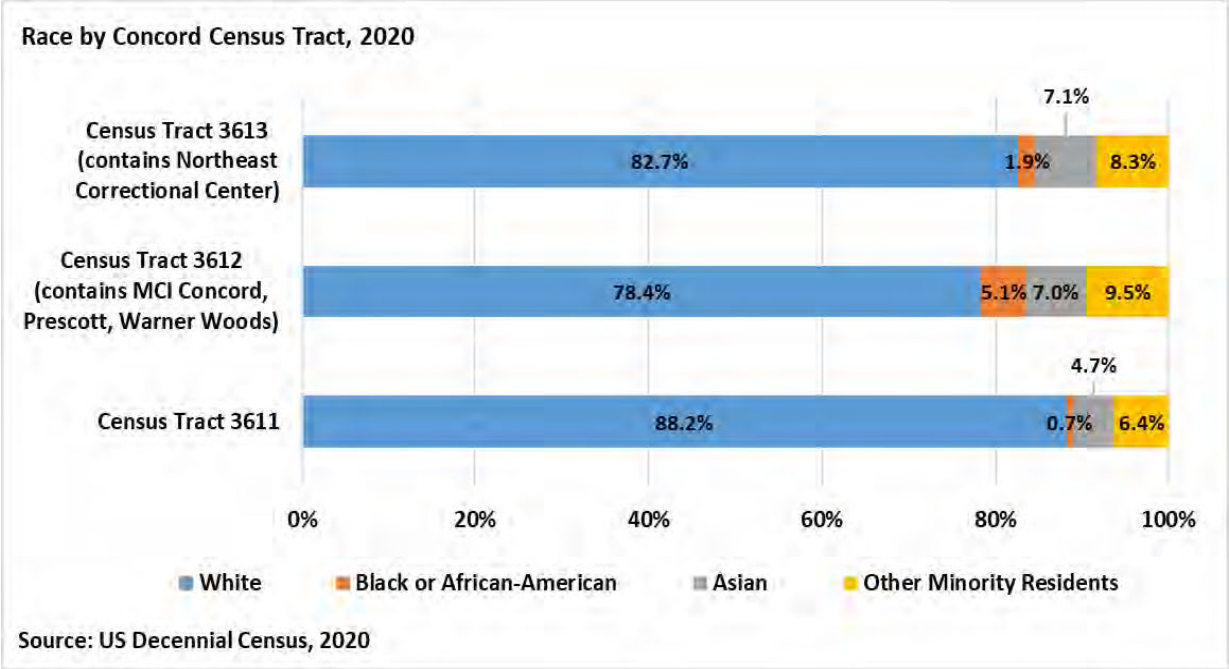
The racial and ethnic composition of Concord (which includes the populations of inmates at two Massachusetts Department of Corrections facilities) has experienced larger changes between 2010 and 2020 than it did in the previous decade. According to the 2020 American Community Survey (ACS), although the vast majority of Concord is still white, the percentage has dropped from 89.7% in 2010 to 83% in 2020.

During this time, certain minority populations in Concord have experienced more substantial increases. Most notably, there has been a 244% increase in the number of Concord residents who identify as being part of “other minority groups” – from 2.5% of the population in 2010, to 8%, in 2020, or an additional 1,065 people. There has also been a 65% increase in the number of residents who identify as Asian during this period – from 4% of the population to 6%, or an additional 462 people. Conversely, there was a decrease in the percentage of Black or African-American residents between 2010 and 2020 – from 3.8% of Concord’s population in 2010 to 2.6% of Concord’s population in 2020. Furthermore, according to the Massachusetts Department of Corrections, there are currently a total of 219 Black/African-American people in the prisons located in Concord.²⁰ This means that there are only 263 Black/African-American people in Concord who are part of the non-institutionalized population. Therefore, only 1.4% of the non-institutionalized population in Concord is Black/African American.

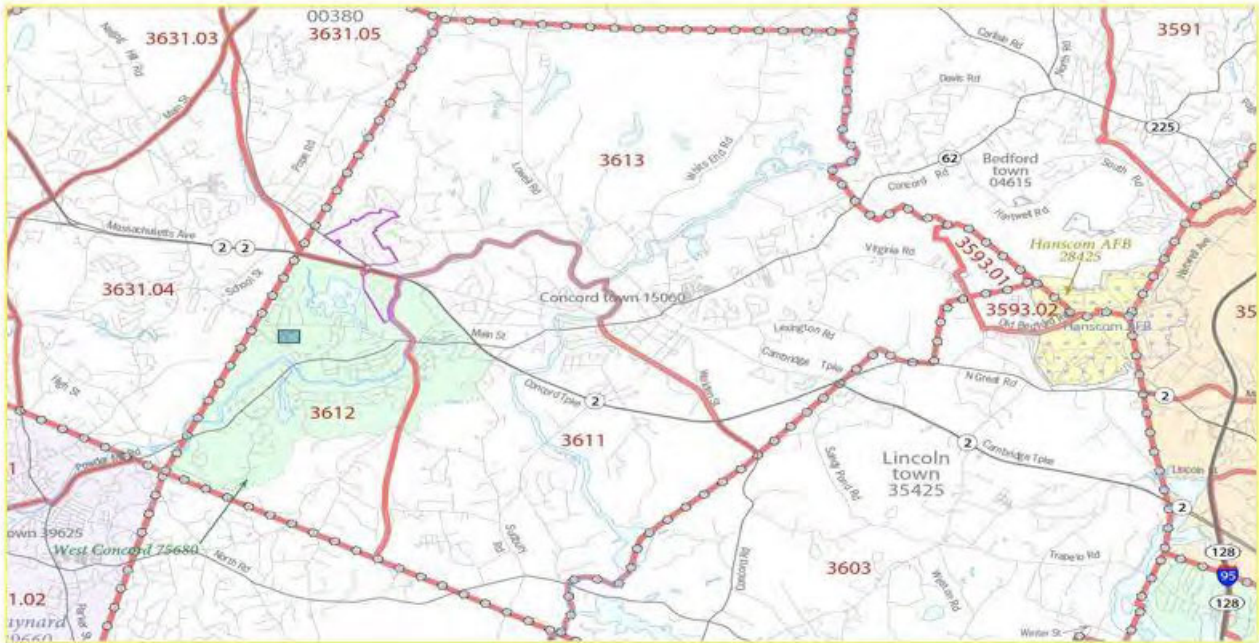
²⁰ Massachusetts Department of Corrections Institutional Fact Cards - <https://www.mass.gov/doc/institutional-fact-cards-january-2021/download>



Census tract data breaks down the population even more and shows that the percentage of minorities is higher in the census tracts that contain correctional institutions and large, multi-family housing developments. This is line with data from the Massachusetts Department of Corrections -52% of the black population in census tract 3612 is at MCI, and 43% of the black population in census tract 3613 is at NECC.



Map of Concord Census Tracts



DISABILITY

The U.S. Census Bureau defines a disability as a long-lasting physical, mental, or emotional condition. Residents with one or more disabilities can face housing challenges if there is a shortage of housing in a community that is affordable, physically accessible, and/or provides the supportive services that people with disabilities may need. According to the 2020 American Community Survey (ACS), 9.3% of Concord’s civilian, non-institutionalized

population report having one or more disabilities. This includes 1.7% of children under 18 years of age, and 6% of the population aged 18 to 64 years of age. Notably, 27% of Concord’s 65 and older population reported having one or more disabilities. Concord’s rate of disability among all age groups is comparable to the rates in Middlesex County and Massachusetts overall.

Population by Disability Status						
	Concord		Middlesex County		Massachusetts	
	Estimate	Percent	Estimate	Percent	Estimate	Percent
Total Civilian Noninstitutionalized Population	17,438		1,591,288		6,800,682	
With a Disability	1,625	9.3%	150,386	9.5%	795,507	11.7%
Under 18 years	4,569		317,330		1,359,002	
With a Disability	79	1.7%	12,096	3.8%	63,741	4.7%
18 to 64 years	9,216		1,035,456		4,340,893	
With a Disability	565	6.1%	68,342	6.6%	387,106	8.9%
65 years and over	3,653		238,502		1,100,787	
With a Disability	981	26.9%	69,948	29.3%	344,660	31.3%

Source: 2020 American Community Survey

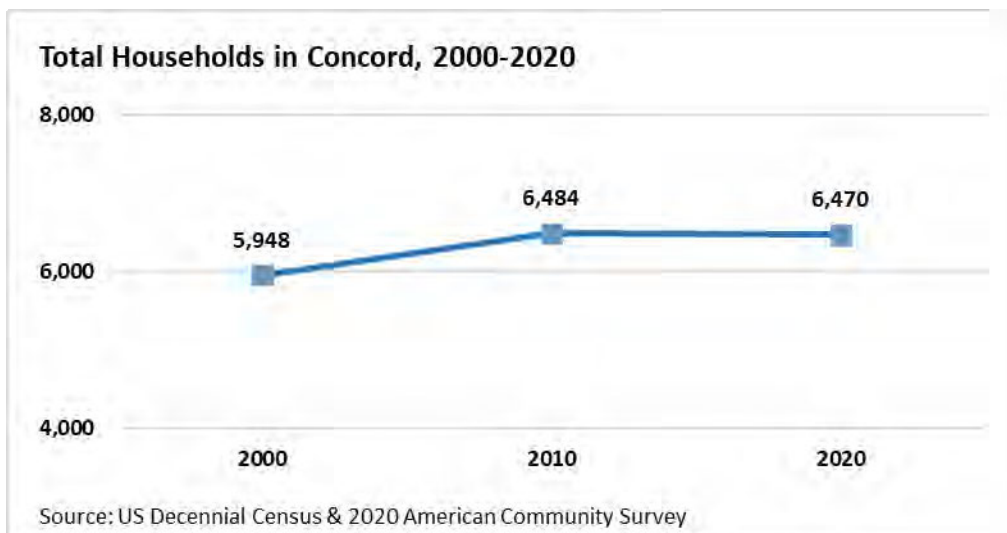
According to RHSO records, Concord currently has 23 units of housing on its Subsidized Housing Inventory (SHI) that are managed by the Massachusetts Department of Developmental Services (DDS) for people with developmental disabilities. In addition, Community Housing Options manages 20 units of housing for people with disabilities. Lastly, there are a handful of units at Concord Housing Authority (CHA) properties that are accessible to people with physical disabilities. There are four accessible units at Peter Bulkeley Terrace and one accessible unit at Everett Gardens Expansion, both elderly (60+)/disabled developments, and there are three additional accessible units among the CHA’s family properties.²¹

²¹ Conversation with Concord Housing Authority (CHA) executive director on 10/13/22.

HOUSEHOLDS

HOUSEHOLD COMPOSITION

The number of households in a community is often considered even more important than population since the number and type of households within a community, and household spending power, correlate to housing unit demand. Each household resides in one dwelling unit, regardless of the number of household members. As of 2020, Concord is home to 6,470 households, a slight decrease from the 6,484 households in 2010. Therefore, although the population has been increasing, the number of households has remained basically flat.



FAMILY & NON-FAMILY HOUSEHOLDS

Different household types often have different housing needs or preferences. For example, a single senior will prefer a smaller dwelling unit than a family with children. A municipality's composition of household types can indicate how well suited the existing housing inventory is to current and future residents.

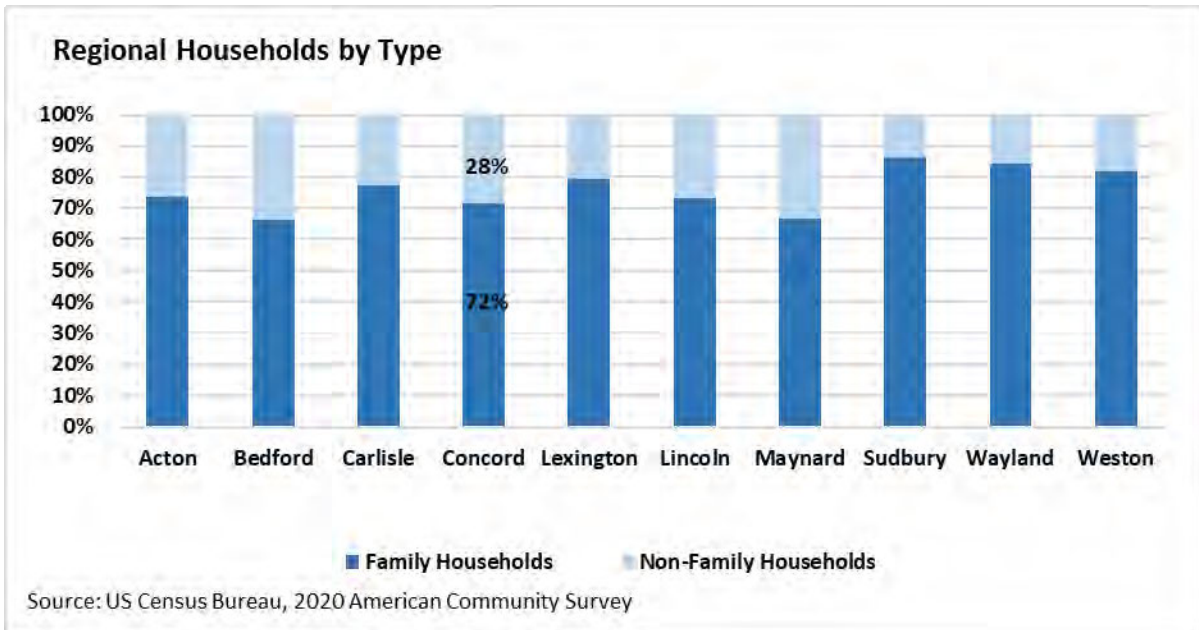
The Town of Concord's 6,470 households can be divided between families and non-families. Families include any household with two or more related persons living together. Non-families are either households with only one person, or households with more than one non-related persons living together.

Concord Households by Type			
	Estimate	% of Family Households	% of Total Households
Family Households	4636		72%
With own children under 18 years	2279	49%	35%
Married Couples	4215	91%	65%
With own children under 18 years	2044	44%	32%
Male Householder, No spouse present	109	2.4%	1.7%
With own children under 18 years	26	0.6%	0.4%
Female Householder, No spouse present	312	7%	5%
With own children under 18 years	209	5%	3%
<hr/>			
	Estimate	% of NonFamily Households	% of Total Households
Nonfamily Households	1834		28%
Householder living alone	1603	87%	25%
65 years and older	1071	58%	17%
Household with more than one person	231	13%	4%
Total Households	6470		

Source: 2020 American Community Survey

A large majority of Concord's households are family households. Of Concord's family households, the vast majority are married (91%) and a little under half have children under the age of 18 (49%). Notably, according to 2020 American Community Survey (ACS) data, there are 209 more families with children now than when Concord last did an HPP in 2015.

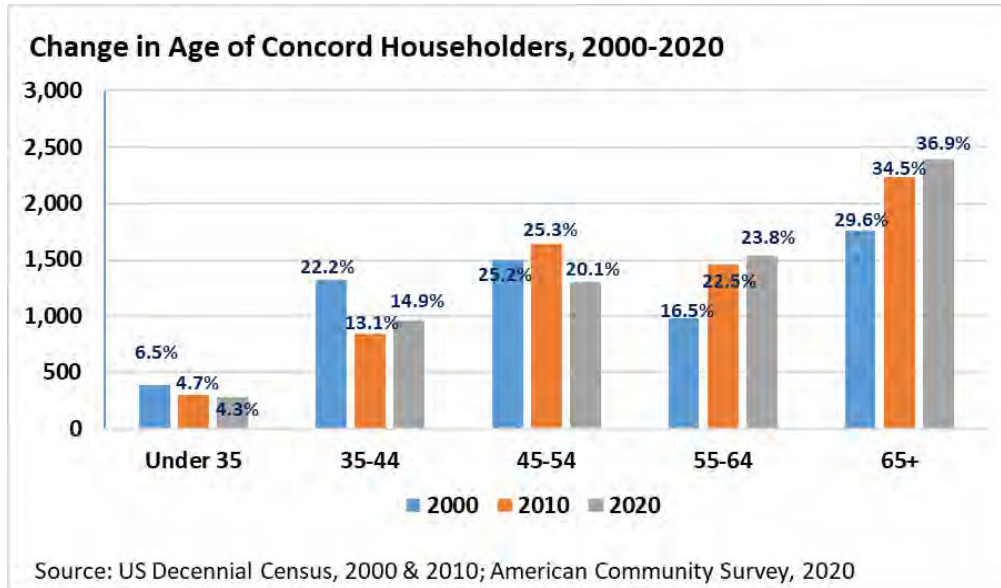
Of the nonfamily households, 87% are single-person households and 67% of those are 65 years of age or older.



Although Concord’s households are primarily families (72%), Concord has one of the higher rates of non-family households (28%) in the group of comparison communities. Only Bedford and Maynard have higher percentages of non-family households. Middlesex County and Massachusetts overall, however, both have comparatively higher proportions of non-family households (36% and 37% respectively).

HEAD OF HOUSEHOLDER BY AGE

In addition to household type, the age of heads of households can indicate demand for particular unit types and sizes. As of 2020, the largest group of Concord householders is age 65+ (37%), and this age group has been steadily increasing during the past two decades. The next largest age group, 55-64, has also been growing. All three other age groups – under 35, 35-44, and 45-54 – represent a smaller segment of Concord’s population in 2020 than they were in 2000.



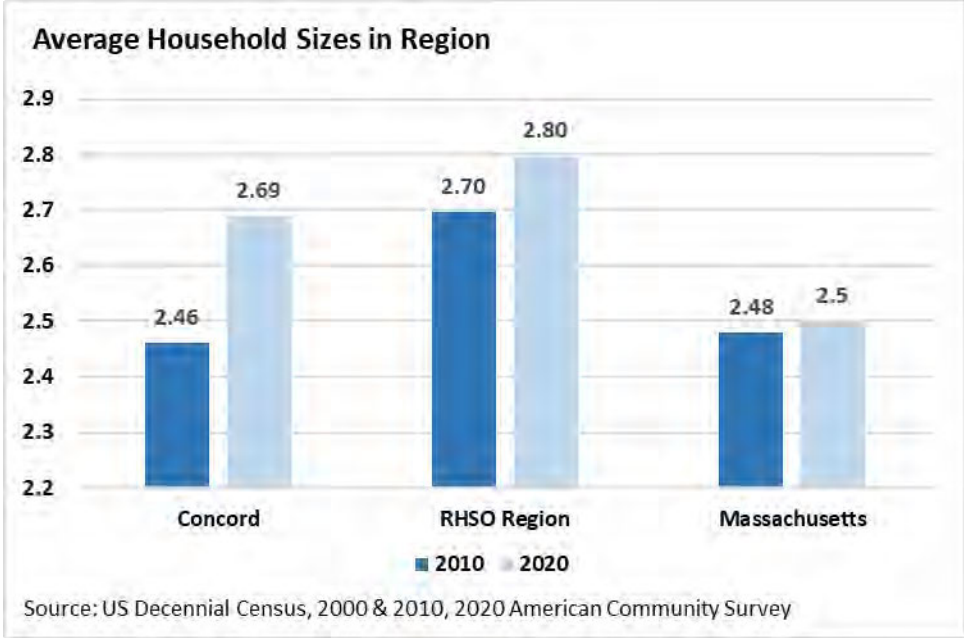
HOUSEHOLD SIZE

The trend of decreasing household size from 2000 to 2010 has reversed according to recent 2020 data. Average household size increased from 2.46 people in 2010 to 2.69 in 2020. The increasing size was consistent over both owner-occupied and renter-occupied households. Although data is not specifically available to explain the increase in household size, possibilities include an increase in multigenerational households or households with a greater number of minor children.

Average Household Sizes in Concord			
	2000	2010	2020
Overall Households	2.62	2.46	2.69
Owner-Occupied Households	2.77	2.65	2.9
Renter-Occupied Household	1.99	1.84	2.1

Source: US Decennial Census, 2000 & 2010, 2020 American Community Survey

Concord's increasing household size during this period is consistent with trends in the region, as well as in Massachusetts. However, the increase in Concord's household size is greater than almost all other towns in the region, as well as in Massachusetts overall. Following the increase, Concord's household size in 2020 now falls right in the middle of comparison towns.

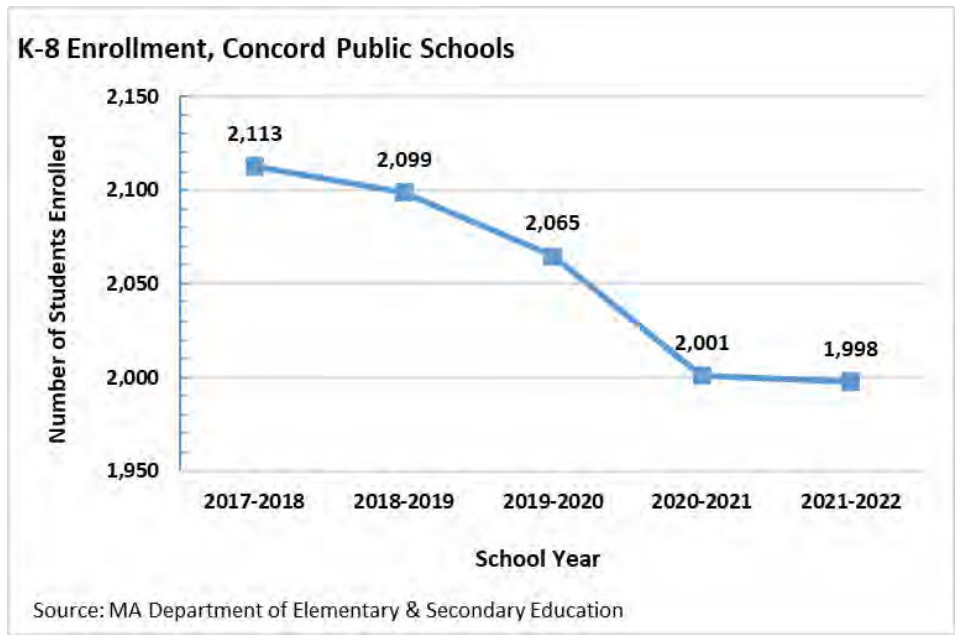


EDUCATION

ENROLLMENT

Enrollment in the Concord School District provides additional insight into recent population and economic trends within town. Concord is served by both the Concord Public Schools (CPS) for kindergarten through eighth grade and the Concord-Carlisle Regional School District (CCRS) for grades nine through twelve.

Concord’s K-8 school enrollment has been modestly, but consistently declining in recent years. In the past five years, Concord’s K-8 public schools have seen a 5.4% decrease in enrollment. According to the New England School Development Council’s (NESDC) 2021-2022 Enrollment Projection Report included in the Superintendent and School Committee’s FY23 Adopted Budget²², this trend of flat or slightly decreasing K-8 enrollment will continue through 2031 (note that this projection is a combined number with Carlisle’s K-8).



²² <https://www.concordps.org/wp-content/uploads/2022/03/FY23-CCRS-Budget-Book-03.14.2022.pdf>

Concord School Enrollment (Grades K-8)		
Year	K-8 Enrollment	% Change from previous year
2017-2018	2,113	n/a
2018-2019	2,099	-0.7%
2019-2020	2,065	-1.6%
2020-2021	2,001	-3.1%
2021-2022	1,998	-0.1%

Source: Massachusetts Department of Elementary and Secondary Education

Concord-Carlisle High School has seen very modest increases in enrollment over the last five years. Between 2018 and 2020, there was an increase of less than 10 students, but the past two school years have seen larger jumps in enrollment. Enrollment during the last school year ending in June 2022 was 1,323, an increase of 50 students or 4% from the school year ending in 2018.²³ However, NESDC anticipates decreases over the next ten years, with a projected enrollment of 1,286 next school year, then 1,235 in the 2026-2027 school year, and down to 1,227 in the 2031-2032 school year.

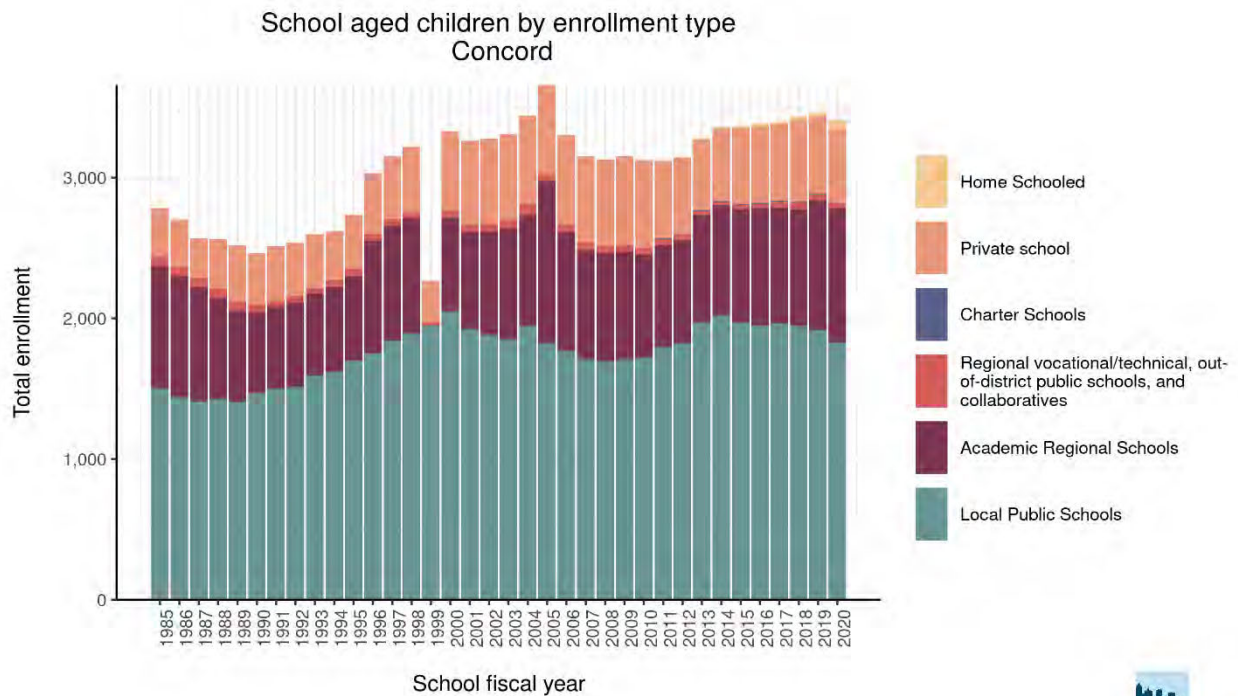
Concord and Concord-Carlisle Public Schools are not the only option for Concord children. Families may choose to send their children to a private school, a charter school, a regional vocational/technical school, or families may home school. Below is a chart provided by Massachusetts Housing Partnership’s DataTown website that shows how many Concord children attended school between 1985 and 2020, and what types of schools they attended. The bottom green bar in this chart represents Concord K-8 public schools, and the maroon bar right above represents Concord-Carlisle Regional High School. These bars demonstrate what was stated above – K-8 enrollment in the past several years has been declining, while enrollment at the high school is up slightly.

The chart also shows more historical data and we can see that K-8 public school enrollment started increasing in 2010, continued increasing until 2014, and has now been gradually decreasing. The increases in the high school came later which makes sense – as the influx of kids in the elementary schools aged, they moved on to the high school. Very few Concord children choose to attend regional vocational/technical and charter schools and those numbers have not fluctuated much over the years. Private school attendance increased in the early 2000’s and has been fairly consistent with little ups and downs ever since. Home

²³ MA Department of Elementary & Secondary Education - <https://profiles.doe.mass.edu/analysis/enrollment.aspx?orgcode=06400000&orgtypecode=5&>

schooling also represents only a small number of Concord children. Home schooling saw a substantial increase from 2019 to 2020, but still remains a small number overall.

Finally, this chart shows that the overall number of school age children in Concord grew in the nineties and into the early 2000's, then dipped back down between 2007 and 2011. The number of school-aged children increased modestly in 2012 and 2013, but has been pretty flat since then. Based on the projections from the NESDC, Concord Public Schools are not currently anticipating enrollment increases in the coming years.



Source: Massachusetts Department of Elementary and Secondary Education



EDUCATIONAL ATTAINMENT

In Concord, 72.5% of residents 25 years or older have earned a bachelor's degree or higher educational attainment. On the other end of the spectrum, the rate of incomplete high school education is a low 4.9%. The percentage of people who only completed high school is 12.5%, and the percentage of people with some college is 10%. This high level of educational attainment has been in place in Concord for quite a while, and is growing. Only 66% of the population had a bachelor's degree or higher when the last HPP was prepared according to the 2013 ACS data used at that time.

Educational Attainment in Concord			
	Concord	Middlesex	Massachusetts
Less than high school diploma	4.9%	6.3%	8.9%
High school graduate	12.5%	18.5%	23.5%
Some College	10.0%	18.1%	23.0%
Bachelors Degree	27.4%	28.1%	24.5%
Graduate or professional degree	45.1%	28.9%	20.0%

Source: 2020 American Community Survey

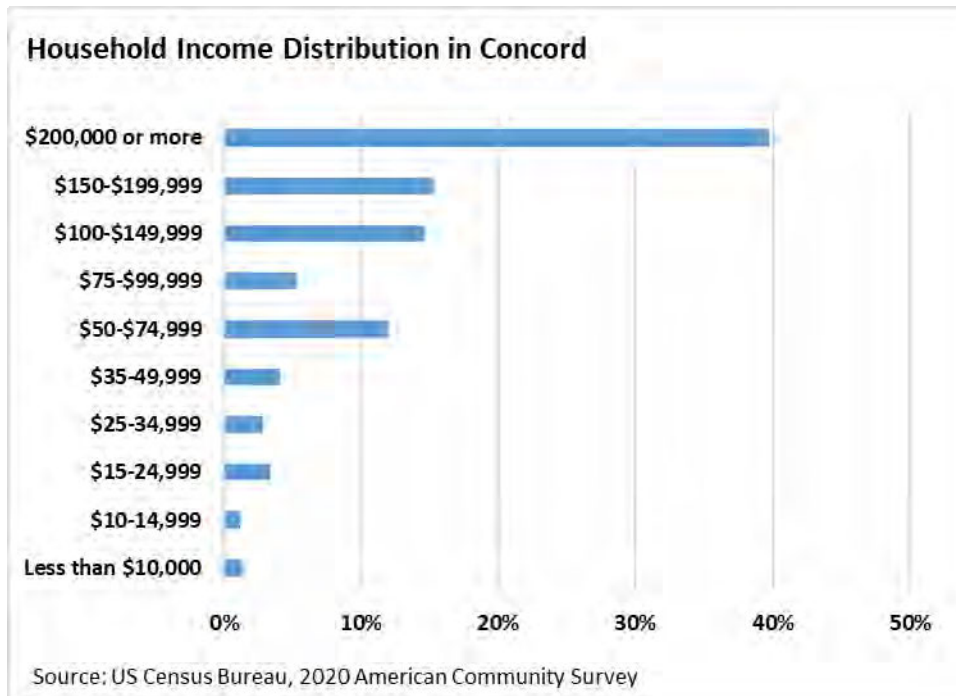
Concord’s rate of residents with a college degree or higher educational attainment is significantly higher than that of Middlesex County and Massachusetts overall. Correspondingly, Concord’s rates of lower educational attainment are lower than in these comparison areas.

ECONOMIC CHARACTERISTICS

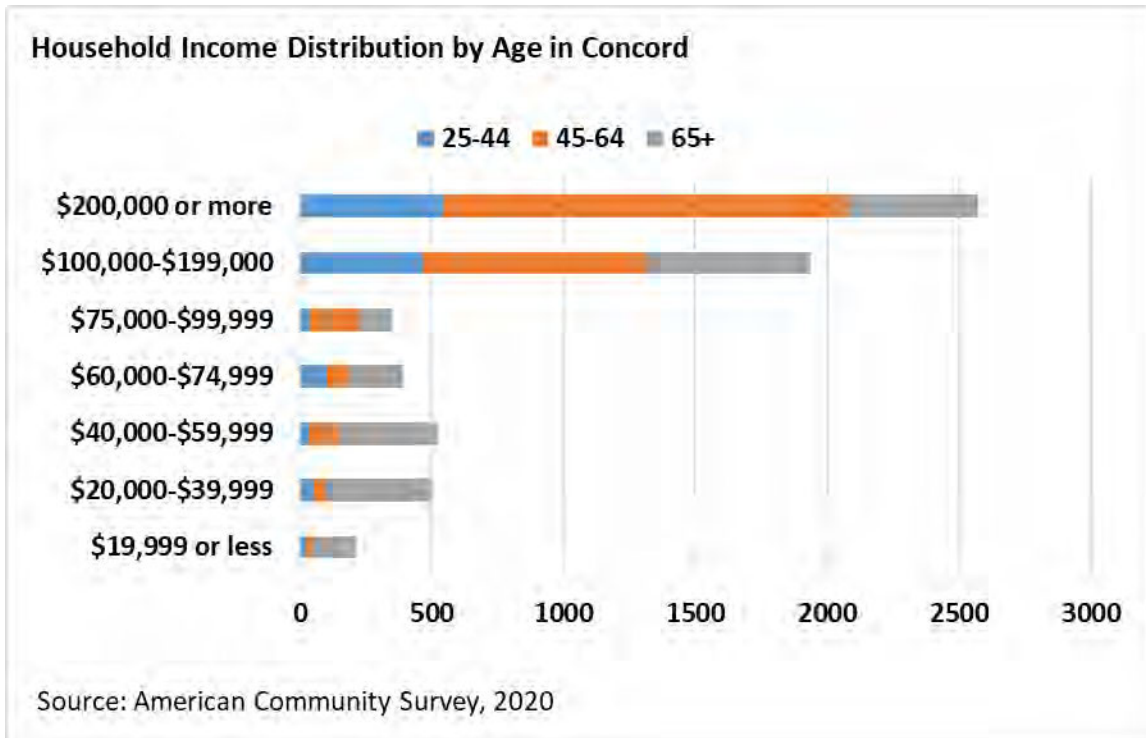
HOUSEHOLD INCOME

Household income is an important determinant of how much a household can afford to pay for their dwelling unit, either to rent or own, and also whether that household is eligible for housing assistance. It is important to note that not all eligible households receive the housing assistance to which they are entitled since the supply of affordable housing does not meet the need.

Concord is home to households earning a wide range of income levels. According to the 2020 American Community Survey (ACS), median household income in Concord is estimated at \$160,392. It is higher for family households at \$201,744, but much lower for non-family households at \$65,161. In addition, 25% of all of Concord’s households (1,618) have annual incomes less than \$75,000.



Concord's income spread is quite different among older householders than those under the age of 65. For example, 81% of householders aged 25-44, and 84% of householders aged 45-64 earn \$100,000 or more per year. However, only 47% of householders over age 65 earn \$100,000 or more per year. Almost half (48%) of those over 65 earn \$74,999 or less per year. Since Concord's older population is more likely to have less income, they are more likely to have difficulty with housing costs than the younger population.



SUMMARY

This overview of Concord’s demographics indicates that Concord’s population is aging and Concord has a comparatively high number of non-family households, likely because the increasing number of older residents are more often comprised of non-family households. At the same time, the proportion of younger households in Concord is decreasing, and the number of people in the largest age group (ages 35-54) is decreasing. Overall, Concord residents are well-educated and have high incomes. Income statistics show that older householders generally have much lower incomes than younger householders.

When considered together, these factors indicate that the need among Concord’s **current residents** is for smaller size affordable housing units targeted to Concord’s older residents. However, it is also important to consider the housing needs of people the Town would like to attract to live in Concord. It is important to understand why younger households in Concord are decreasing, and to focus on housing that meets the needs of younger families as well.

CHAPTER 4: HOUSING CONDITIONS

The following section examines Concord's current housing supply and how it has changed over time. Understanding housing type, age, tenure, vacancy, and recent development will contribute to an understanding of current need and demand in Concord and thereby help inform future housing production planning.

KEY FINDINGS

- 27.6% of Concord's housing stock is multi-family – this is more housing diversity than all but two comparison communities.
- Older and younger households are more likely to be renters.
- The median price of single family homes increased dramatically in the past five years.
- Smaller, lower priced homes are disappearing from Concord.
- Concord has issued virtually no permits for multi-family units in the past five years.
- Concord's median gross rent, according to Census data, and snapshot data from Trulia.com, indicate that much of Concord's rental housing costs more than the fair market rent (FMR) for nearly all unit sizes.
- 27.5% of Concord households are low income, earning less than 80% of AMI and therefore may be eligible for housing assistance through most federal and state programs.
- Concord has had a net loss in units on the SHI since 2015 (from 718 to now 715), with few units in the pipeline. It is likely that Concord will fall below the 10% in 2023 when the SHI is recalibrated with the new Census data.
- 31% of all Concord households are cost burdened, paying 30% or more of their income on housing costs; The problem is worse among renter households -- nearly half are cost-burdened.
- The clear majority (83%) of Concord's very low-income households (50% AMI or below) are housing cost burdened.
- 10.43% of Concord's housing, or 715 units, is recorded on the state's Subsidized Housing Inventory. However, half of these SHI units are actually market rate (due to counting rules for rental properties) reducing the SHI to 5.21% if removed from the inventory.
- Single-family home prices are rising faster than income in the last decade. The median income has risen 34%, and the median home price 70%.

HOUSING SUPPLY AND TRENDS

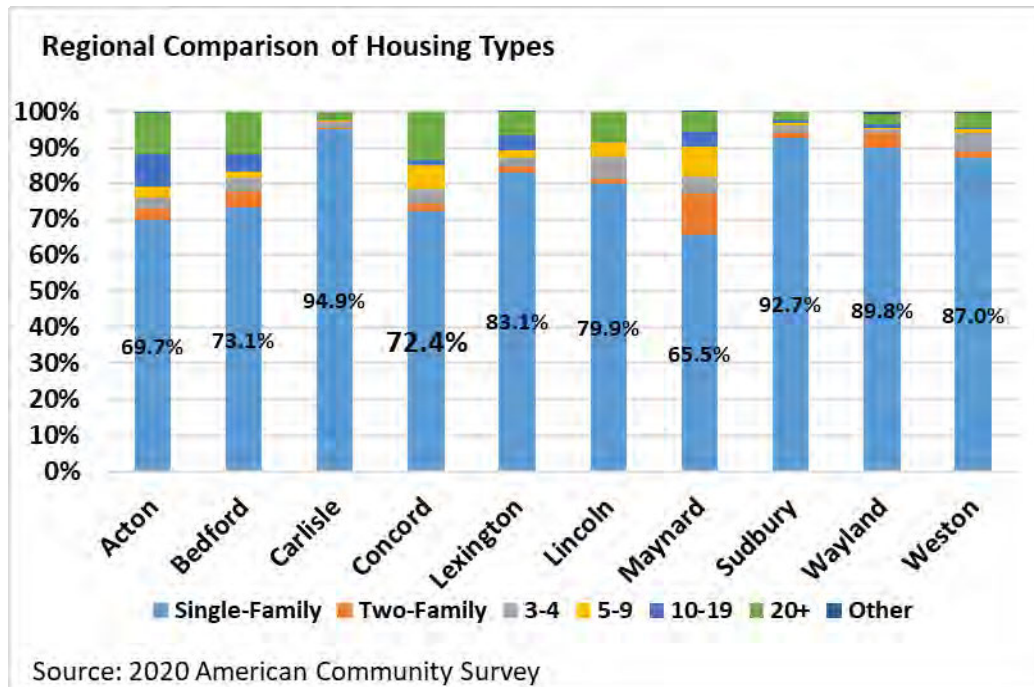
TYPE & AGE

72.4% of Concord’s housing units are in single-family homes. Multifamily housing is distributed among residential structures of two or more units. Of this housing type, buildings with more than 10 units are most prevalent, comprising just over 15% of the total housing stock. Multi-family developments in Concord with 10 or more units include Community Housing Options with 20 rental units, Emerson Annex with 10 ownership units, Warner Woods with 80 rental units, Fairhaven Gardens with 42 rental units, The Prescott (formerly Concord Mews) with 350 rental units, 76 units of state-funded elderly/disabled public housing spread between three different sites, and 14 units of state-funded family public housing at one site.

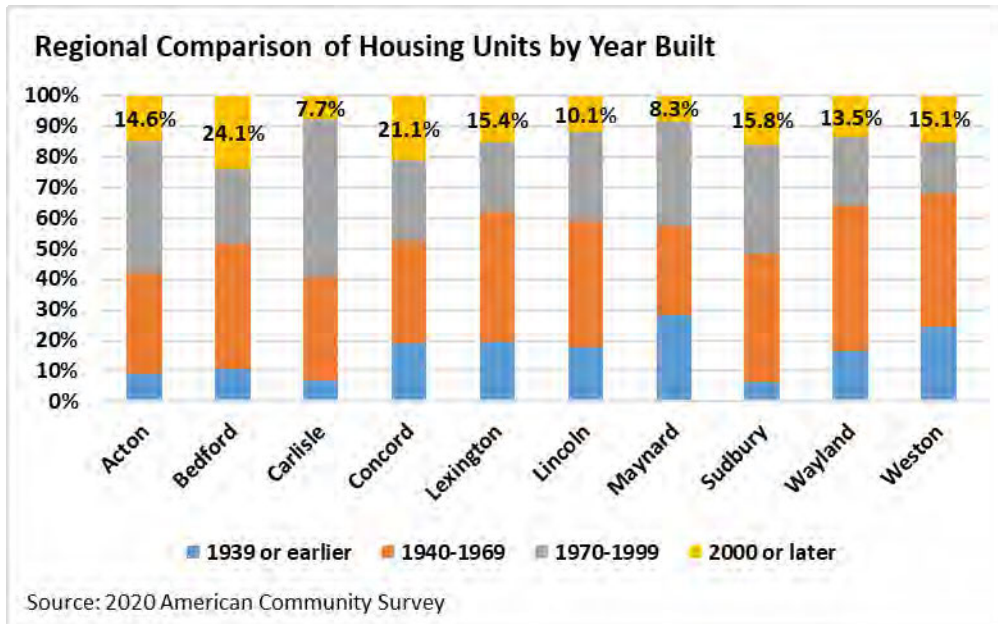
Housing Units by Type		
	# of Units	Percent
Single-Family, detached	4,639	65.7%
Single-Family, attached	476	6.7%
Two-Family	131	1.9%
3-4	299	4.2%
5-9	454	6.4%
10-19	110	1.6%
20+	957	13.5%
Total	7,066	100.0%

Source: 2020 American Community Survey

A regional comparison shows that all surrounding municipalities have housing stocks composed primarily of units in single-family structures. Concord has more housing diversity than all but two comparison communities, Acton and Maynard.

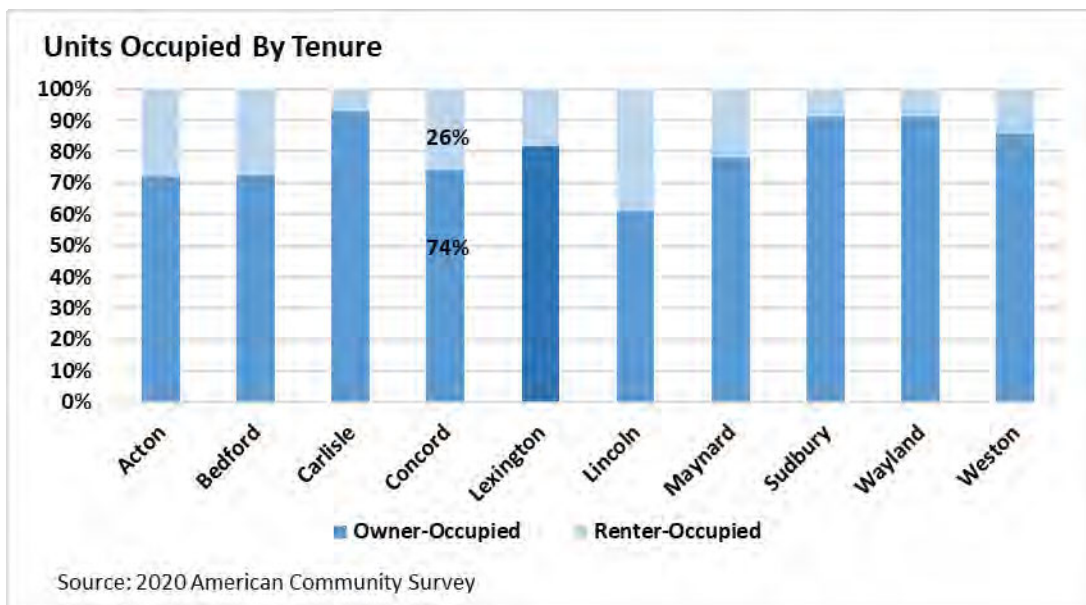


19% of Concord housing units were constructed in 1939 or earlier, the fourth highest percentage among the towns in the comparison region. This is notable because older structures may lack heating and energy efficiencies and may not be code compliant, which adds to the monthly utility and maintenance costs. Older units may also have lead paint which can be costly to remediate, but which is unsafe for children if not remediated. These additional costs have an impact on the affordability of older units for both owners and renters. An additional significant percentage, 34%, were built between 1940 and 1969. 21% of housing units were added since 2000, the second highest percentage among the towns being used for comparison.

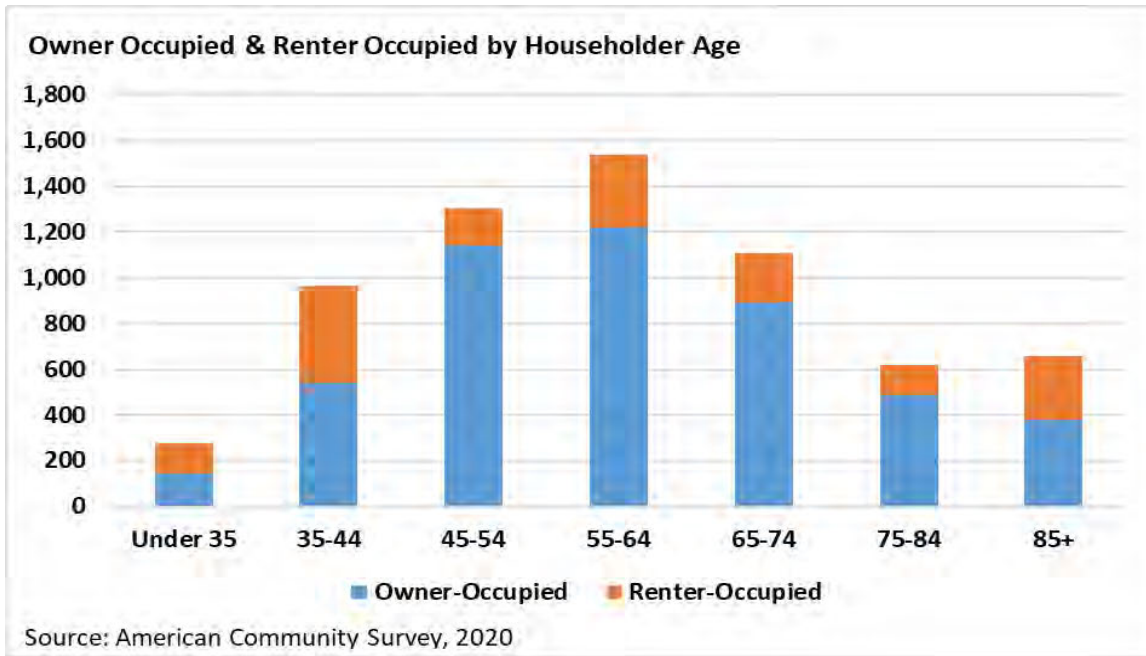


TENURE

Of Concord's total 6,470 occupied housing units, 4,799 (74%) are owner-occupied. Compared to the region, Concord has the fourth highest percentage of renter-occupied housing.



Older and younger households are more likely to be renters. 45% of households in the 44 and under age categories are renters. At the other end of the age spectrum, 32% of households age 75 or older in Concord are renters. A much smaller proportion of households in all middle age categories are renters - the great majority of Concord households in these age groups are owners.



VACANCY

Although the 2020 decennial census data used by DHCD to calculate SHI percentage is not available, 2020 American Community Survey (ACS) data is available to provide some information on housing units and vacancy rates. The 2020 ACS reported 7,066 total housing units in Concord, with 6,470 occupied housing units (91.6%) and 596 vacant housing units (8.4%). Vacant units represent the proportion of the inventory that is vacant and for sale or for rent. The 2020 homeowner vacancy rate was 4, and the rental vacancy rate was 6.1. These rates are higher than in recent years – the average homeownership vacancy in Concord since 2014 was about 2.5, and the rental vacancy rate in that time period was about 5.4. About 74.2% of occupied units were owner-occupied and 25.8% renter occupied.

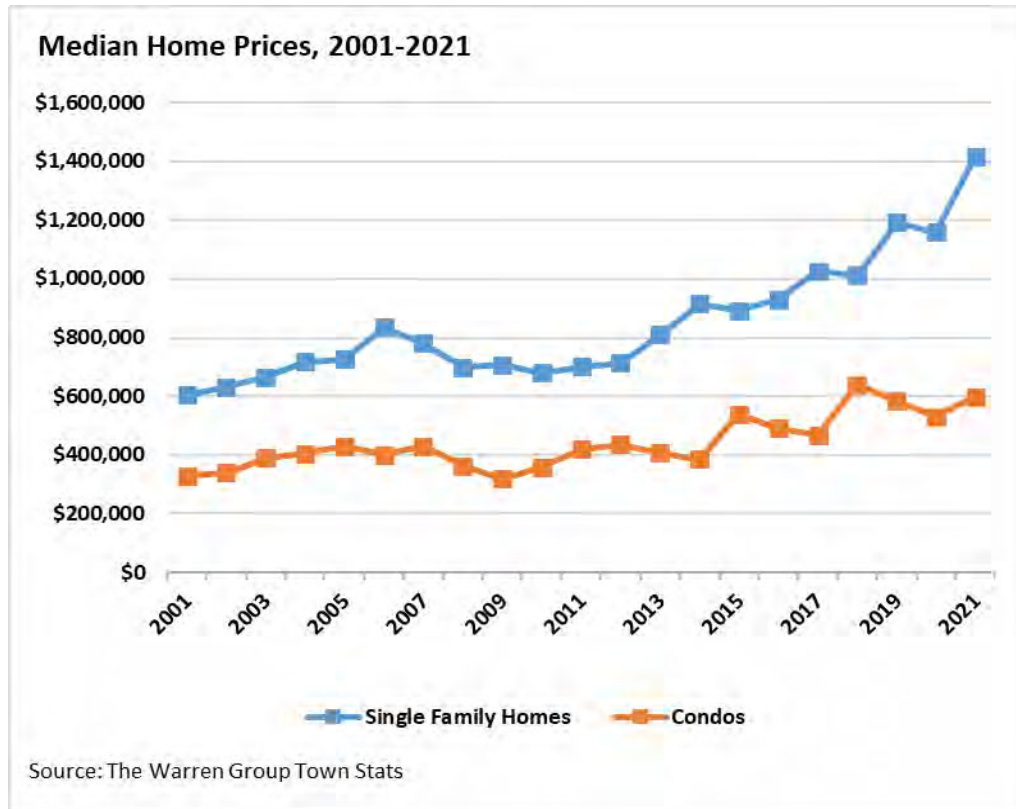
HOUSING MARKET

Housing costs within a community reflect numerous factors, including demand and supply. If the former exceeds the latter, then prices and rents tend to rise. Depending on the income levels of the population, these factors can significantly reduce affordability for both existing residents and those seeking to move in.

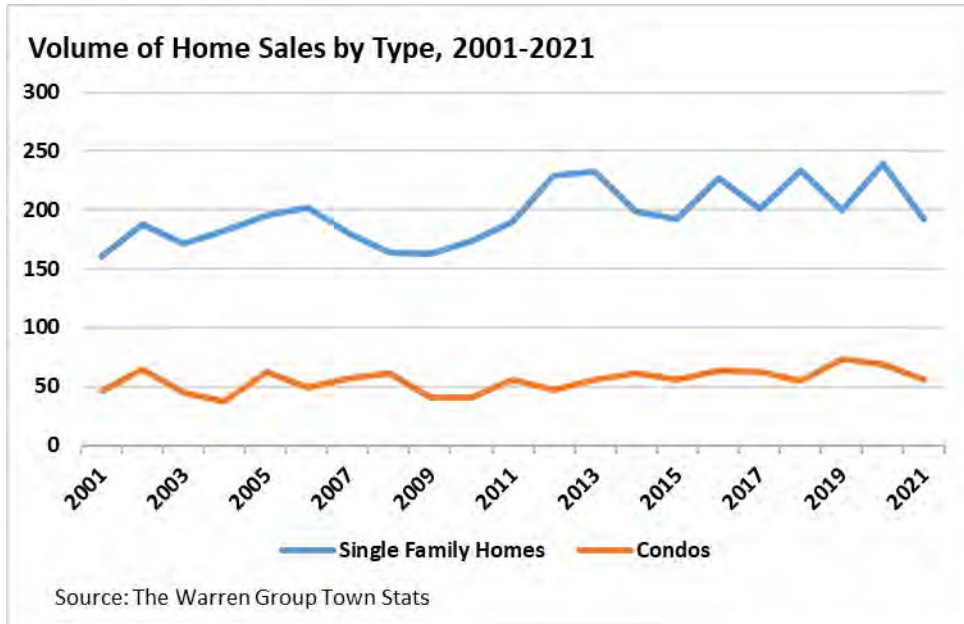
Sale Prices & Volume

According to data from The Warren Group, after several years of mostly flat single family home prices between 2008 and 2011, home prices began rising steadily about 10 years ago, and then rose quite steeply starting a few years ago. The market reached a new height in

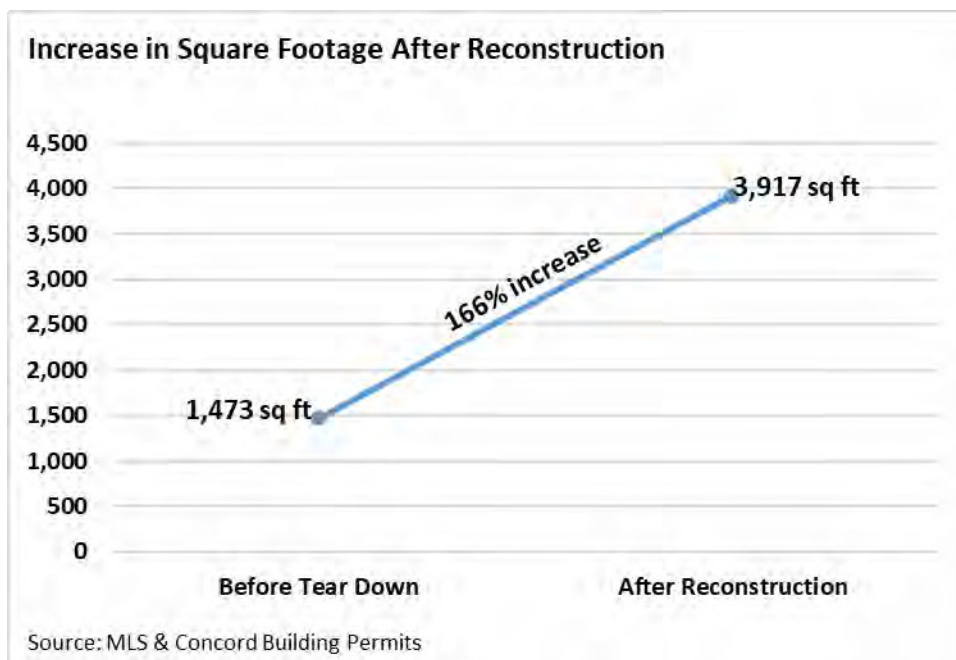
2021 when the median sale price of homes in Concord was \$1.25 million. The median price for single family homes was even higher at \$1.4 million, and the price for condominiums was lower at \$765,000.

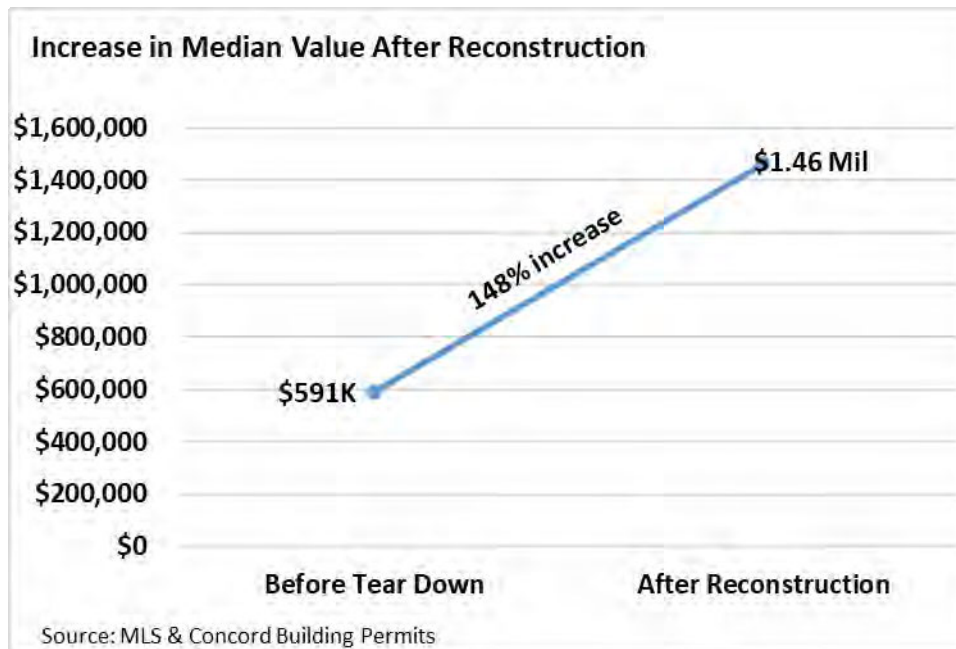


During this same time period, the volume of overall sales has fluctuated. Condo sales have been fairly steady year over year, but single family home sales have had more ups and downs. Sales volumes increased substantially for a few years, beginning in 2010, but then flattened out a bit, and has been up and down ever since.



An analysis of MLS data between 2008 and 2020 revealed that over 300 tear-down permits were issued during this period. The clear majority of homes that were torn down (where the square footage was known) were smaller homes under 1,800 square feet. In addition, almost all were assessed for under \$500,000. The homes that were built in place of the tear-downs are dramatically larger and dramatically more expensive which means that more and more modestly sized and modestly priced homes are disappearing from Concord. [Note that some homes are not sold through MLS and are direct from seller to developer, and not reported in this analysis.]

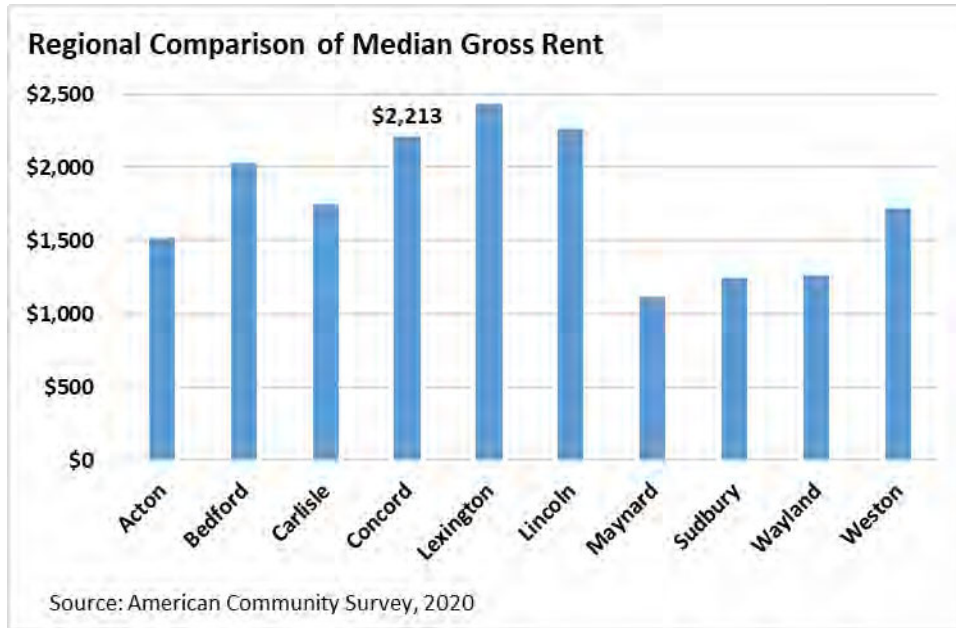




The extremely high prices of Concord’s ownership housing indicate that households with low or even moderate incomes cannot afford to purchase a home in Concord and points to a demand for more affordable homeownership options in Concord. The gap between the housing that is available for purchase in Concord and the prices that many households living in Concord, as well as households who may want to move to Concord, can afford is discussed in more detail in the Housing Affordability section later in this document.

Rent

Median gross rent varies widely throughout the region. At \$2,213 Concord’s median rent, per the American Community Survey (ACS), is the third highest in the area. It is also significantly higher than the Middlesex County median gross rent of \$1,874.



Unfortunately, ACS rental data is not the most reliable. First, rents are self-reported and second, they represent units that were leased at any time prior to survey response, so they do not paint an accurate picture of the current market. Finally, they do not specify gross or net rents so it is unclear whether any utility costs are included in the ACS rent amounts.

An examination of Concord apartments listed for rent on Trulia.com on September 21, 2022 augments the data on the rental market. Based on these listings in Table 9 below, we can see that rental housing (like homeownership housing) available in Concord, is more expensive than the ACS figure. In addition, these listings show that rental units currently available are extremely limited – only 15 total listings spread across all bedroom sizes. Furthermore, like the ACS, Trulia rent amounts also do not specify what, if any, utility costs are included. The total gross rent (including utilities) for all of these listings would presumably be \$200-\$300 higher. The Housing Affordability section of this document will describe whether the available rental housing can meet the needs of Concord’s population.

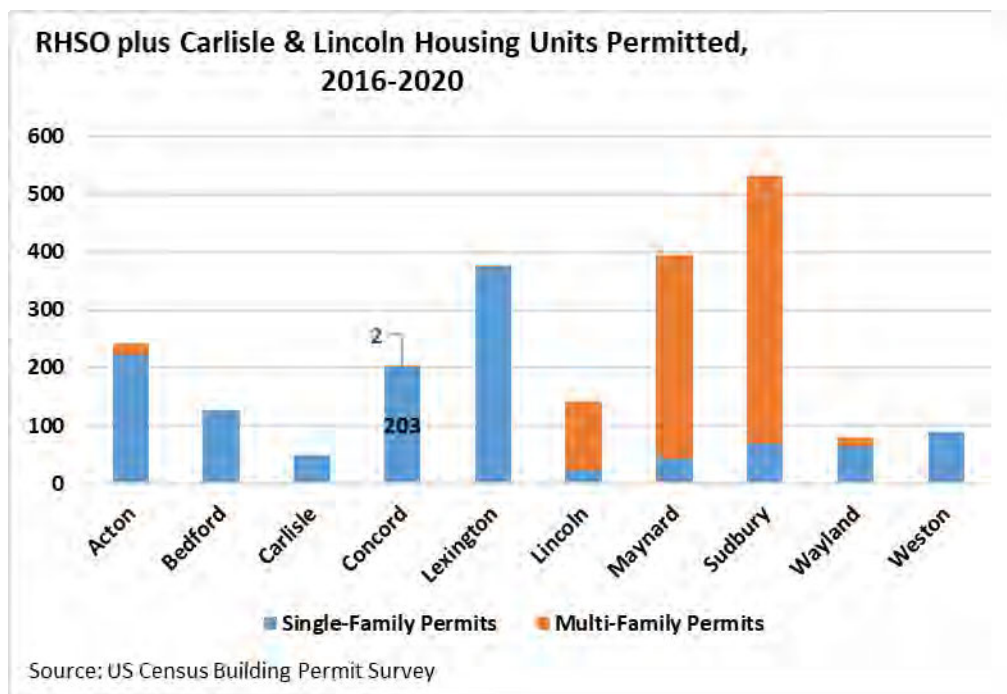
Concord Apartments listed for rent on Trulia.com, 9/21/22	
Average price of a Studio unit based on 1 listings	\$1,200
Average price of a 1-bedroom unit based on 4 listings	\$2,240
Average price of a 2-bedroom unit based on 6 listings	\$3,016
Average price of a 3+ bedroom unit based on 5 listings	\$4,696

Source: Trulia.com, September 21, 2022

RECENT AND FUTURE DEVELOPMENT

HOUSING UNITS PERMITTED

Housing permits issued during the last five years is one of the State’s criteria for allocating Housing Choice grant funds, so it is important to look at Concord’s progress in permitting units during this time. During the last five years for which building permit data is available, between 2016 and 2020, Concord issued permits for 205 housing units. Of those, 203 were for single-family homes, while 2 were for units in multifamily buildings. Concord’s total housing production during this period is about average among comparison communities. However, permits for new multi-family housing have been basically absent which is a concern regarding favorability for Housing Choice grant funds.



SUBSIDIZED HOUSING INVENTORY STATUS AND PIPELINE

The below developments are the current pipeline for known and potential efforts.

Time Frame	# Units	Detail
FY23	No new units	
FY24	1 unit – Millrun 1 unit – Gerow	Likely Likely
3 – 5 years	5 units – Assabet River Bluff	In Planning, some might come earlier
5 – 10 years	5 units Bedford St (CHA) 1 unit Main St (CHA) 2 units Walden Street (CHA) 1 unit Peter Spring Road (CHA)	Requires sewer Requires sewer Requires sewer Further analysis required
Upon Vacancy	2 CHA properties	Could be added to SHI upon vacancy
Longer Term	Junction Village 2229 Main Street/Starmet site Peabody Middle School	Large municipal efforts requiring advocacy

Future: And looking forward, there are some properties with expiring restrictions which will be removed from the SHI if not extended or preserved: Community Housing Options (20 rental units expiring in 2037) and Fairhaven Gardens (42 rental units expiring in 2043), and Emerson Annex (4 ownership units expiring between 2028 and 2035). Analysis and discussions with owners could start prior to expiration to explore options – an expanded discussion of this issue is included in the Goals and Strategies section of this document.

HOUSING AFFORDABILITY

In the previous sections, Concord’s population and housing stock were examined. The intersection of these previously examined areas—demand (people) and supply (housing units)—as well as policy, planning, and funding, ultimately determines housing affordability in a given community. In this section, the affordability of Concord’s housing stock to Town residents and potential Town residents is assessed.

POVERTY RATE

According to the 2020 American Community Survey (ACS), 2.7% of Concord’s population is below the poverty level (annual income below \$15,930 for a household of two), a decrease from 5.6% in 2015, and lower than Middlesex County (7.7%) and Massachusetts (10.4%). Concord’s rate of families with incomes below the poverty level (annual income below \$27,750 for a family of four) is 1.4%, again significantly lower than Middlesex County’s rate of 4.5% and the Commonwealth’s rate of 6.6%. Finally, the child poverty rate in Concord is 3%, once again lower than the Middlesex County child poverty rate of 7.6% and Massachusetts child poverty rate of 12.2%.

HOUSEHOLDS ELIGIBLE FOR HOUSING ASSISTANCE

One measure of affordable housing need is the number of households that may be eligible for housing assistance based on estimated household income. Federal and state programs use Area Median Income (AMI), along with household size, to identify these households. Table 9 below shows U.S. Department of Housing and Urban Development (HUD) income limits for extremely-low (below 30% of AMI), very-low (30-50% of AMI), low-income (50-80% of AMI), and moderate (100% AMI) households by household size for the Boston-Cambridge-Quincy Metropolitan Statistical Area (MSA), which includes Concord. Typically, households at 80% of AMI and below may qualify for housing assistance, though there are some exceptions based on household size and assets.

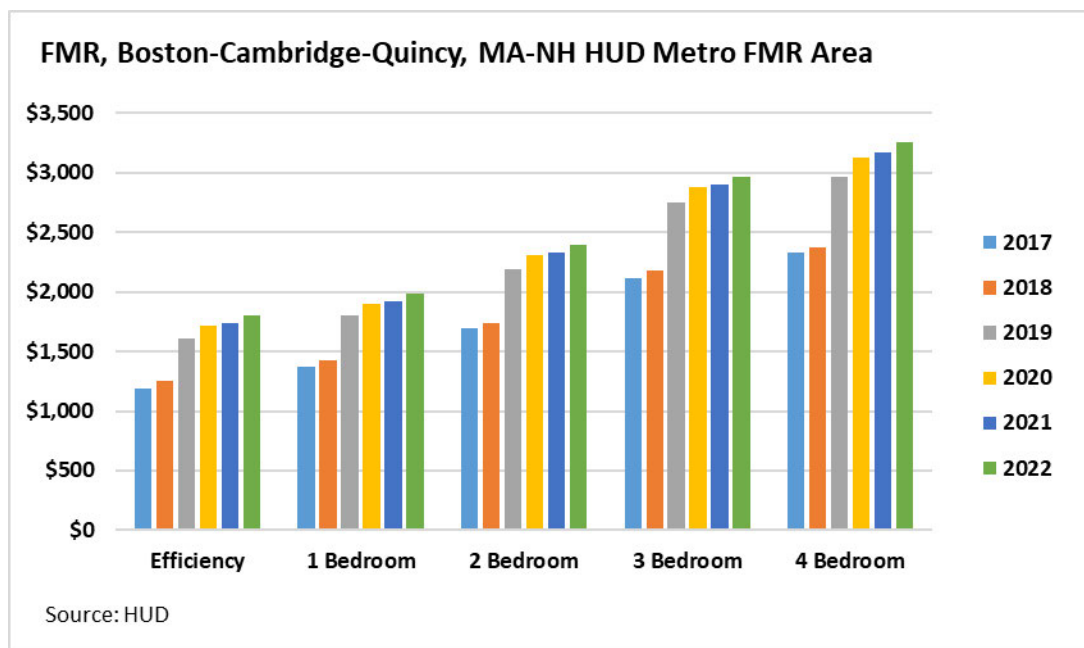
2022 Affordable Housing Income Limits Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area				
	Extremely Low Income (30% AMI)	Very Low Income (50% AMI)	Low Income (80% AMI)	Moderate (100% AMI)
Household Size				
1 Person	\$29,450	\$49,100	\$78,300	\$98,140
2 Person	\$33,650	\$56,100	\$89,500	\$112,160
3 Person	\$37,850	\$63,100	\$100,700	\$126,180
4 Person	\$42,050	\$70,100	\$111,850	\$140,200
5 Person	\$45,450	\$75,750	\$120,800	\$151,416
6 Person	\$48,800	\$81,350	\$129,750	\$162,632
7 Person	\$52,150	\$86,950	\$138,700	\$173,848
8 Person	\$55,550	\$92,550	\$147,650	\$185,064

Source: HUD

HUD’s Comprehensive Affordability Strategy (CHAS) data reports that 7.9%, 7.1%, and 12.5% of households in Concord are extremely low income, very low income, and low income respectively. This means that a total of 27.5% of all households, or approximately 1,825 households may qualify for affordable housing programs based on income, but are unlikely to actually access them due to scarcity.

FAIR MARKET RENTS

Another measure of housing affordability is whether local rent exceeds HUD-determined Fair Market Rents (FMR) which were established as guidelines for Section 8 voucher holders. HUD does not permit vouchers holders to rent apartment units above the FMR because HUD has determined the FMR to be a fair and reasonable price for the geographic area. In figure 17 below, the upward trend, particularly over the last few years, reflects the annual adjustment factor intended to account for rental housing market demands. Given the constraints on the Greater Boston rental housing market, rising FMR’s are unsurprising and point to the need for more rental housing at multiple price points.



Concord’s median gross rent of \$2,213 according to ACS data is higher than the FMRs for two-bedroom and larger units. Furthermore, the average prices of Concord rentals listed recently on Trulia.com (see Table 8) for 1-bedroom and larger units are significantly higher than the FMRs. Furthermore, as stated earlier, both the ACS median and the Trulia prices do not account for utility costs, so gross rents would be even higher. Therefore, it is clear that much of Concord’s rental housing stock exceeds what HUD has determined to be a fair price in the MetroBoston rental market.

Although HUD determines a certain level of rent in an area to be fair, FMR's do not take into account household income, so even an apartment at the FMR is not necessarily affordable to people at all levels of income. As stated in the previous section, a significant number (one-fourth or 1,825) of Concord households have incomes at or below 80% of AMI. As this document will discuss below, income is a major determinant of housing affordability. It is important to consider whether Concord's housing stock meets the needs of its current households and households hoping to move to Concord at all income levels.

CURRENT M.G.L. CHAPTER 40B SUBSIDIZED HOUSING INVENTORY

Under M.G.L. Chapter 40B, affordable housing units are defined as housing that is developed or operated by a public or private entity and reserved by deed restriction for income-eligible households earning at or below 80% of the AMI. In addition, all marketing and placement efforts follow Affirmative Fair Housing Marketing guidelines per the Massachusetts Department of Housing and Community Development (DHCD). These requirements are regulated at 760 CMR 56 and administered by the Department of Housing and Community Development (DHCD).

Housing that meets these requirements, if approved by DHCD, is added to the subsidized housing inventory (SHI). Chapter 40B allows developers of low- and moderate-income housing to obtain a comprehensive permit to override local zoning and other restrictions if less than 10% of a community's housing is included on the SHI.

Communities above the 10% requirement have greater local control over affordable housing developments by requiring local zoning. When a community is above the 10% requirement, the decisions on comprehensive permit applications by the Zoning Board of Appeals (ZBA) to deny or approve with conditions will be deemed "consistent with local needs" under MGL Chapter 40B. In practical terms, since the town can deny a 40B permit (and be upheld at the HAC), developers only submit 40B applications that have the full support of the town (such as a Local Initiative Project or a 'friendly' 40B).

A municipality's SHI fluctuates with new development of both affordable and market-rate housing. The percentage is determined by dividing the number of affordable units by the total number of year-round housing units according to the most recent decennial Census. As the denominator increases, or if affordable units are lost, more affordable units must be produced to reach, maintain, or exceed the 10% threshold.

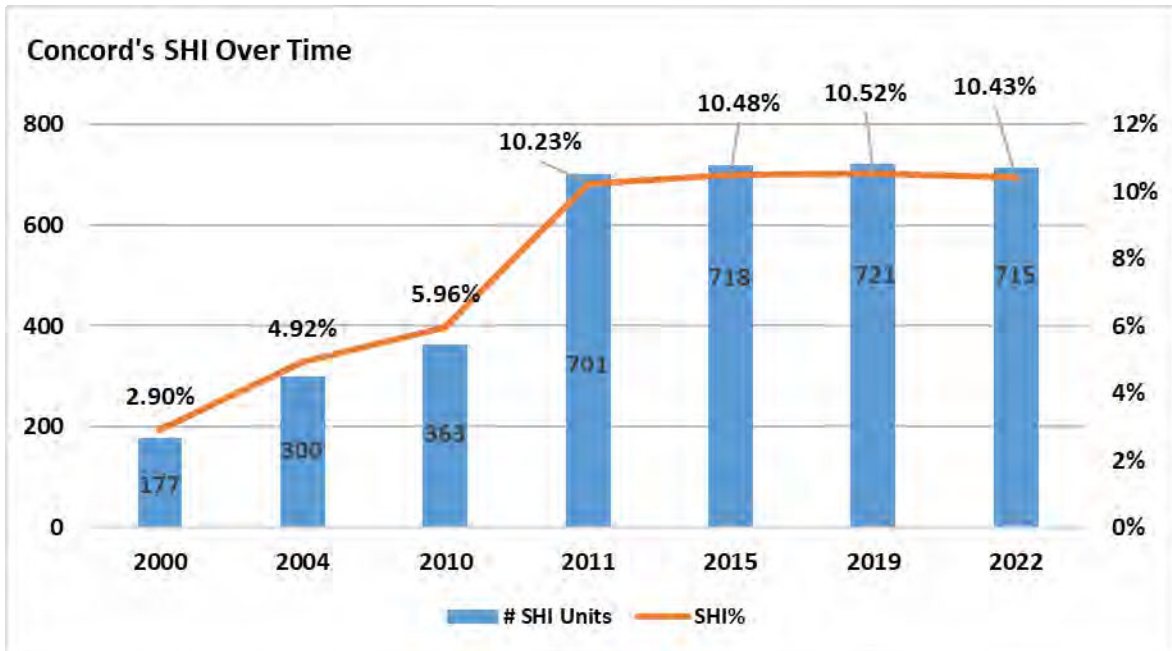
Concord reached the 10% threshold in 2011. A look at the history of Concord's SHI shows that there was a big jump in the number of units on the SHI in the early 2000's, with the

construction of Warner Woods and Fairhaven Gardens, and another big jump between 2010 and 2011 with the construction of The Prescott (formerly Concord Mews). However, following 2011, there were only small increases in the percentage of Concord's housing units on the SHI.

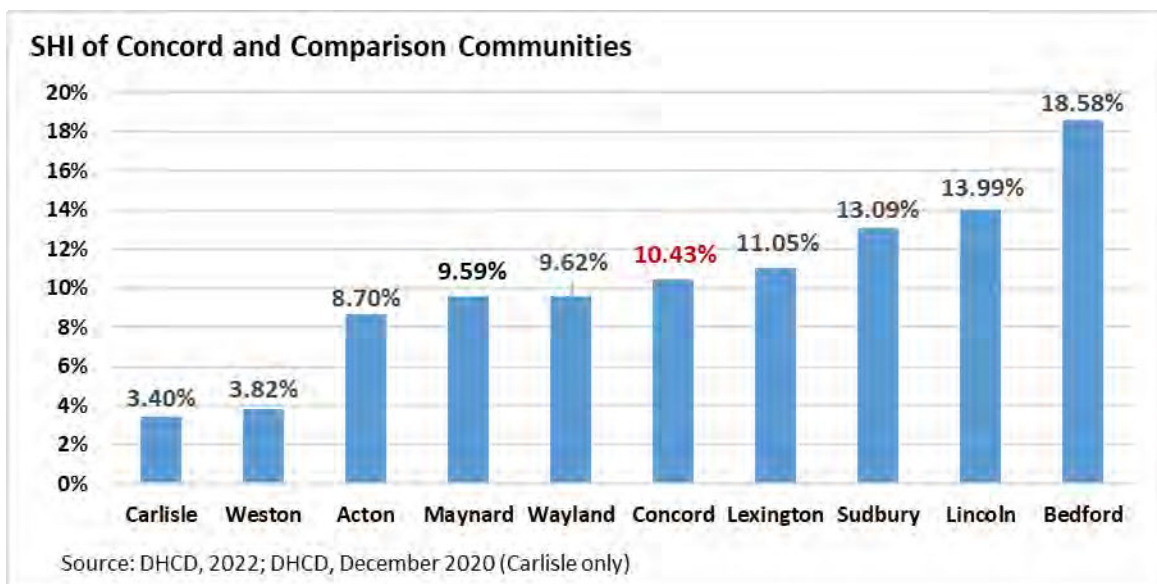
The SHI has remained at the approximate current level since 2013, when the SHI was 10.32% (707 units), after the counting of units at The Prescott and is now lower than it was in 2015. In the last 10 years, while 19 units were created in 6 developments, 11 units were lost in the DCF units (confidential beds in group homes – 9 just this year), for a net of 8 units added.

Currently, of the 6,852 year-round housing units in the town (from the 2010 Census), there are 715, or 10.43% that are counted as 'affordable' on the State's Subsidized Housing Inventory, which is 29 units over the 10% threshold (715 affordable units in the numerator and 6,852 year-round housing units in the denominator). There are 358 market rate units on the SHI, which is exactly half of the units on the SHI, reducing the SHI to 5.21% if taken out of consideration.

The Census Bureau has been delayed in reporting year-round housing units from 2020 decennial census. When those numbers are released in 2023, the denominator for Concord's SHI calculation is expected to increase significantly. This means that the percentage of Concord's housing units on the SHI will once again drop below 10%. The shortfall could be as low as 8, though the trend of losing Mass. Department of Developmental Services (DSS) units puts pressure on creating new units.



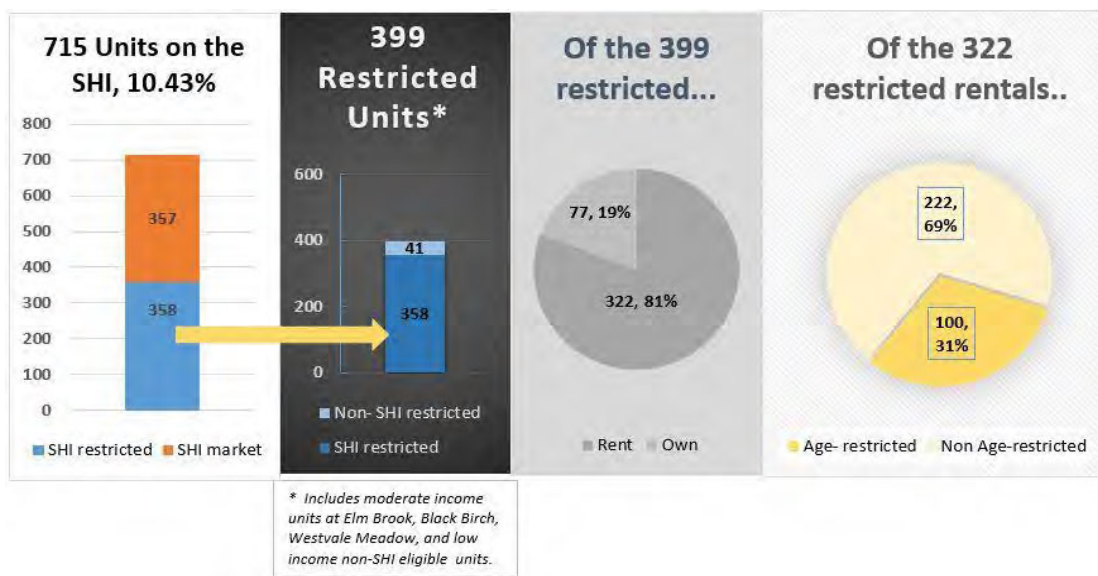
Concord's SHI percentage is right in the middle of the comparison communities, with five communities having higher percentages of units on the SHI, and four communities having lower percentages.



Due to state eligibility policies under M.G.L. 40B, the actual number of affordable units in Concord or any community is much lower than the inventory indicates. Per state policy, 100% of affordable ownership units are included on the SHI, but all rental units (regardless of

the cost of rent) in a development are counted as long as a minimum of 20% of units are affordable at 50% AMI or below, or 25% of units are affordable at 80% AMI or below.

As the chart below demonstrates, only half of the units on the SHI (357 units) are restricted per state requirements. Another 41 units in Concord are restricted, but they are affordable to households with higher, moderate incomes or have other factors that make them ineligible for the SHI. The remaining SHI units are market rate units that are not affordable to low-income households. The vast majority (322) of restricted units are rental units, and 76 units are affordable homeownership units. Of the 322 restricted rental units, 69% are for families, and the other 31% are restricted to households aged 62+.

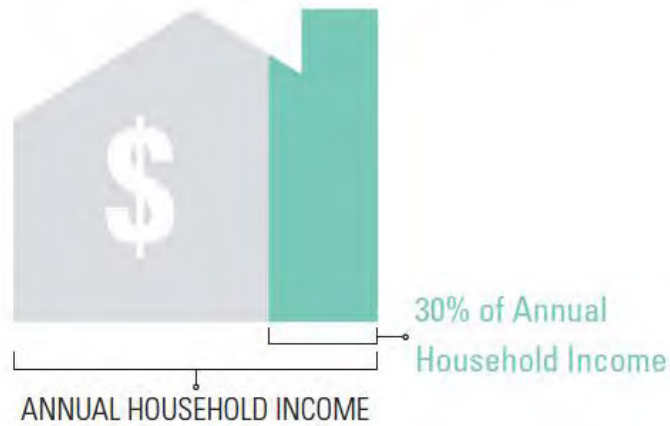


The total 399 restricted units is not nearly enough for the 1,825 households who are at 80% AMI or below. These numbers exhibit that there must be a significant number of low-income households who are paying more for their housing than they can actually afford. These households are considered cost burdened.

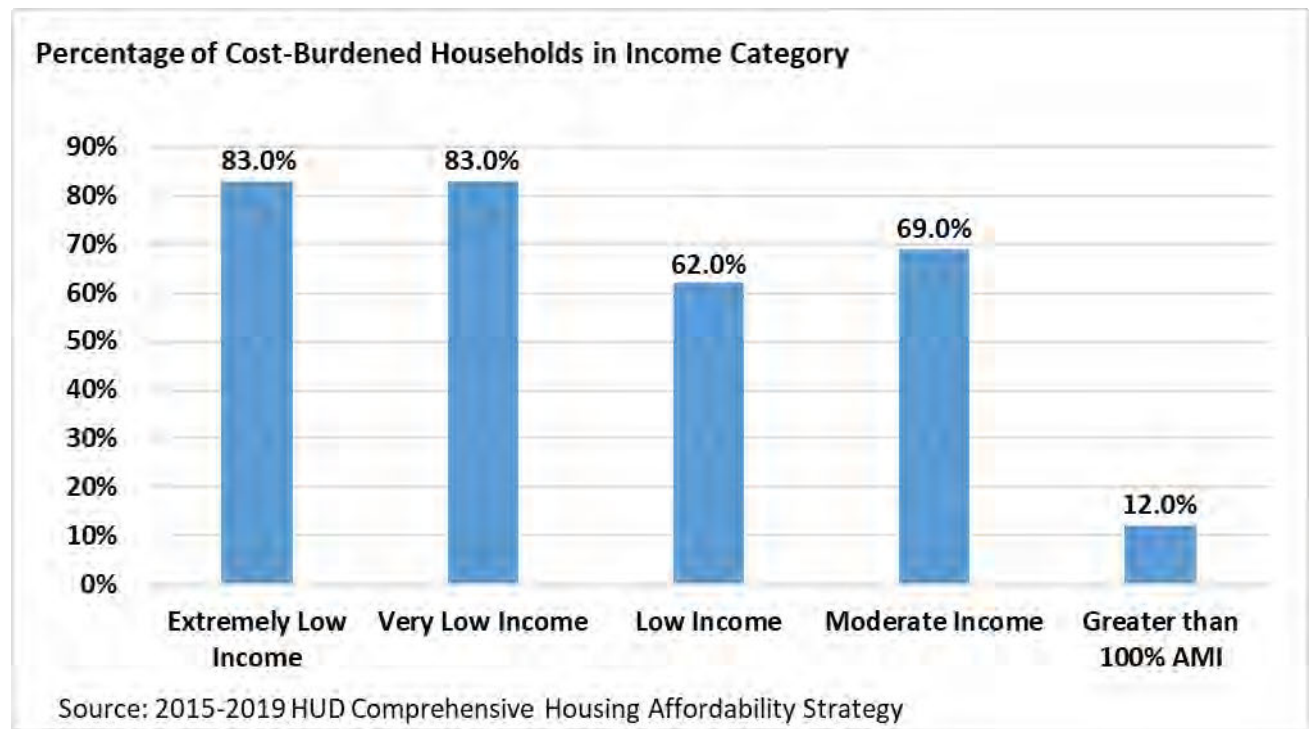
HOUSING COST BURDEN

Another method to determine whether housing is affordable to a community’s population is to evaluate households’ ability to pay their housing costs based on their gross household income. Households who spend more than 30% of their gross income on housing are considered housing cost burdened, and those who spend more than 50% are considered severely cost burdened.

The 30 Percent Rule for Housing Affordability



HUD’s recently updated Comprehensive Housing Affordability Strategy (CHAS) data reports that a total of 31.5% or approximately 2,090 households in Concord are cost burdened, and 14.3% or 950 households, are severely cost-burdened. Notably, the rate of cost burden is significantly higher among renters than owners: 50% versus 26%. Cost burden also occurs at a much higher rate among lower income households than higher income households. The vast majority (83%) of very low-income households equal or below 50% of AMI are cost-burdened.



AFFORDABILITY GAP

The large percentage of low-income households in Concord who are cost-burdened indicates that there is a gap between the number of households at or below 80% of AMI and the number of housing units affordable to households at this income level.

Ownership

A four-person household earning at or below 80% AMI (\$111,850) could afford to purchase a home that costs less than \$324,000, using the DHCD affordability calculator and assuming a 5% down payment and an interest rate of 5.5% (optimistic considering current interest rates). Multiple Listing Service (MLS) data shows that only two condos and no single-family homes were sold in Concord for \$325,000 or less during the past five years, 2017 through 2021.²⁴ Zillow.com shows that there are currently no properties on the market in Concord for less than \$600,000 – well above what a low-income family can afford. Furthermore, the DHCD affordability calculator shows that Concord's 2020 median sale price of \$1,159,000 for single family homes requires an annual income of about \$283,000²⁵, over \$122,000 higher than Concord's median household income of \$160,392. Although census data for median income is not yet available for 2021, it is notable that median sales prices continued to rise in Concord – the median price for single family homes was up to \$1,416,000 in 2021, and the median price for all homes, including condos, was up to \$1,250,000. The median price for all homes in Concord jumped by \$350,000 since 2018, and the median sales price for single family homes jumped by over \$400,000 since 2018.²⁶ This all illustrates that home prices in Concord are rising much faster than income.

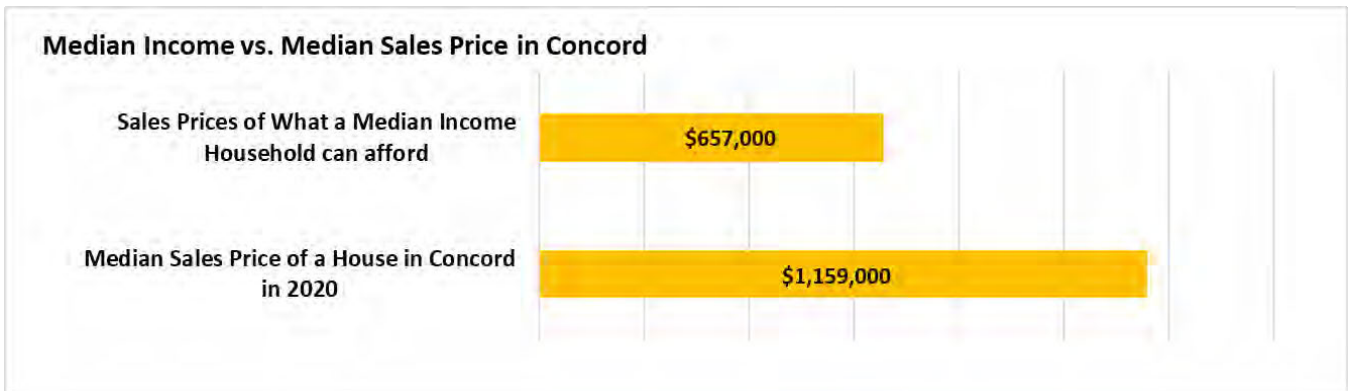
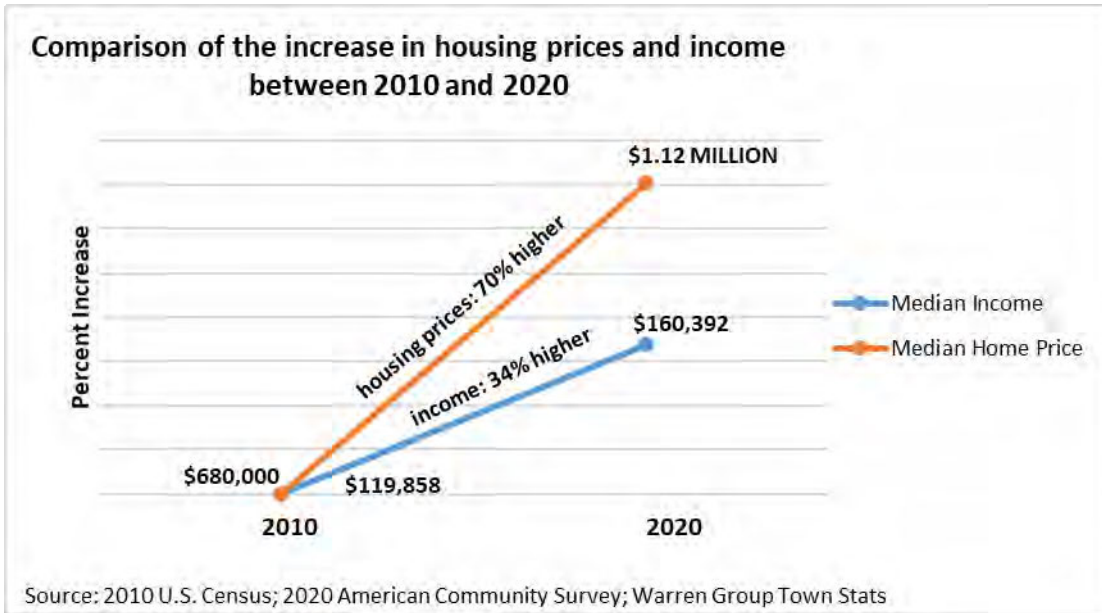
The Concord median income is \$160,392. A household at this income level could afford a house that costs approximately \$657K which is affordable to a household earning somewhere between 110% and 115% AMI.

A household of 4 at 150% AMI earns \$210,300. A household at this income level could afford a house that costs approximately \$860K. So, if you're pricing a house to be affordable to 150% AMI, a median income household in Concord could not afford it. You would need to price a home at 110% to 115% AMI to be affordable to a median income household.

²⁴ MLS report provided by realtor Mike Hunter, William Raveis Real Estate

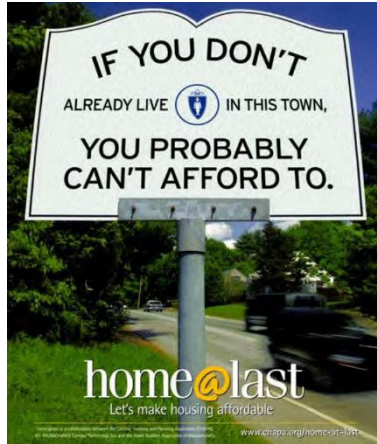
²⁵ Author's calculations assumes a 20% down payment and 5.5% interest rate

²⁶ Median sales prices from The Warren Group



Current Concord households are not the only ones who are not able to afford to purchase a home in Concord. According to 2020 ACS data, the median household income in Middlesex County was \$106,202, so a median income household in the area who is looking to move to Concord would also not be able to do so. Materials from a public education campaign by the Citizens Housing and Planning Association (CHAPA)²⁷ clarifies the situation in many communities in Massachusetts, including Concord:

²⁷ Citizens' Housing and Planning Association (CHAPA)'s mission is to encourage the production and preservation of housing that is affordable to low and moderate-income families and individuals and to foster diverse and sustainable communities through planning and community development – www.chapa.org



Rental

For rentals, a 4-person household earning 80% of AMI (\$111,850) could afford \$2,796 per month in rent if all of the utility costs for the apartment were included, or approximately \$2,200 per month in rent if utilities were not included.²⁸ Trulia rental listings (see Table 8 earlier in this document) demonstrate that the average two-bedroom rental in Concord costs over \$3,000 and the average cost of a 3+ bedroom rental in Concord is nearly \$4,700. There is a gap of several hundred dollars between what a low-income household can afford for rent and the actual average monthly cost to rent an apartment in Concord. In addition, the limited number of 16 total rental listings in the recent Trulia search indicates there is an overall scarcity of rental housing in Concord which makes finding a rental unit even more difficult. The gap between the actual cost of housing units in Concord that are available to buy or rent and the housing cost that would be affordable to low-income families is substantial. This affordability gap indicates a clear need for more rental and homeownership units that would be affordable for households earning 80% or less of AMI.

SUMMARY

This overview of Concord's housing conditions indicates that Concord's current housing supply consists primarily of single family homes, but with more rental housing than most comparison communities. The demand for housing in Concord is consistently strong, both in the homeownership and rental markets, so the vacancy rate is low.

Production of housing has slowed in Concord in recent years, particularly production of multi-family rental housing and smaller ownership homes. Building permit data shows only two

²⁸ Author's calculations assume rent is affordable when no more than 30% of gross income is spent on rental costs. The Concord Housing Authority Utility Allowance chart was used to calculate the affordable rent with no utilities included.

multi-family permits were issued in Concord in the most recent five years for which data is available. Tear down permit data since 2008 shows that more modestly sized and modestly priced homes are disappearing from Concord.

The low vacancy rate combined with the low housing production in recent years has led to the current state of very high prices, both for rental and ownership housing. Older Town residents with fixed incomes are now in a situation where they cannot afford to move from their current homes. Families interested in moving to Concord hoping to purchase a home are not able to do so unless they earn over 200% of the area median income in the region (\$283,000 annually).

Together these factors point to the same housing needs as the previous demographic chapter – smaller size affordable housing units for Concord's current residents, and more affordable housing options, particularly homeownership options, for families who would like to move to Concord.

Concord may also consider the implications for diversity, equity, and inclusion (DEI) as it plans for future affordable housing development. The exclusionary effects of a history of discriminatory zoning, redlining, and other housing policies can be seen in Concord and many other communities throughout Massachusetts. When looking at the historical racial composition of Concord, the exclusion is clear. Racial minorities were not only historically excluded from housing opportunities, but also from educational and economic opportunities. The combination of these factors created a vicious cycle where certain minority groups are now economically disadvantaged and not able to break into elite communities like Concord due to the continuing high cost of housing. Supporting new affordable housing in Town is a step towards inclusion and ensuring that all demographic groups have the opportunity to live in the wonderful community of Concord.

CHAPTER 5: DEVELOPMENT CONSTRAINTS

Concord is a desirable residential community because of its natural beauty, good schools, rich history and traditions, proximity to Boston, and access to highways and public transportation. Developable land is scarce due to extensive floodplains and wetlands, active farming uses, and protected open spaces, which has caused the price of land to rise. High land prices contribute to ever-increasing housing costs, while high expectations around municipal services and schools drive real estate tax increases. These combine to make the town unaffordable for many who currently reside in Concord and those who would like to move into the community. Zoning is a significant constraint in diversifying Concord's housing efforts because over 90% of the town is zoned for residential use, and the development pattern has been primarily single-family housing.

Many factors influence the feasibility of housing production, from physical limitations to regulations that shape development and land use. This chapter reviews environmental constraints, infrastructure constraints, and regulatory barriers and considerations. Note this analysis relied heavily on the Town of Concord Open Space & Recreation Plan (2015) and the Envision Concord: Bridge to 2030 Comprehensive Long Range Plan (2018). Citations are included for other sources.

KEY FINDINGS

ENVIRONMENTAL CONSTRAINTS

- According to the 2015 Open Space & Recreation Plan (OSRP), 59% of Concord's total land area is considered open space, with 38% of all land in town listed as permanently protected open space.
- Approximately 50% of the town is under the Natural Resources Commission (NRC) jurisdiction per the Wetland Protections Act (WPA) and Wetlands Bylaw.
- Global climate change will only increase the frequency and severity of flooding events in Concord, as the warming atmosphere can hold and deposit more significant amounts of moisture in more severe bursts.

INFRASTRUCTURE CAPACITY

- Almost all Concord residents have access to town water, and about 35% of the town residents have access to town sewer.
- Due to capacity limitations, wastewater treatment is a constraint to development throughout the Town.

- Enrollment in Concord’s public schools has grown slightly by 4% in the past five years (2018-2022)²⁹.
- Concord is served by the MBTA Commuter Rail (Fitchburg line), with service to Boston from two stations.
- Concord is a destination for cyclists and other visitors arriving by car or train, who are attracted to its beauty, terrain, cultural sites, shopping, dining, and recreational resources.

REGULATORY BARRIERS AND CONSIDERATIONS

- In 2020, zoning was changed to expand the potential for development of attached and detached accessory dwelling units. Accessory Apartments (or Additional Dwelling Units (ADUs)) are allowed by right in all Residential Districts when certain criteria are met, and by special permit when relief from certain criteria is needed.
- In 2021, the bylaw was further amended to allow a two-family dwelling by Special Permit in the Residence C Zoning District and allow the Zoning Board of Appeals to reduce the requirement for two parking spaces for each dwelling unit.
- Concord’s zoning bylaw provides some flexibility for Planned Residential Development (PRD). Planned residential developments allow for single-family detached, attached dwellings, or multi-unit structures of all types in accordance with Section 10 of the zoning bylaws in all Residential and Business Zones.
- The Commercial and Limited Business Districts allow combined business/residence uses by right. This use enables multi-family housing when combined in the same building with commercial services. It also requires that at least 20% of the dwelling units be affordable.
- However, the only residential uses allowed by right in residential districts are single-family dwellings.
- Therefore, zoning is a significant constraint in diversifying Concord’s housing efforts because over 90% of the town is zoned for residential use, and the development pattern has been primarily single-family housing.

ENVIRONMENTAL CONSTRAINTS³⁰

LANDSCAPE CHARACTER

Located at the Sudbury, Assabet, and Concord Rivers confluence, Concord has a rolling terrain with an abundance of natural resources, which have inspired the likes of Henry David

²⁹ Massachusetts Department of Elementary and Secondary Education, “School and District Profiles – Concord” <https://profiles.doe.mass.edu/analysis/enrollment.aspx?orgcode=06400000&orgtypecode=5&>

³⁰ This section relied heavily on the Envision Concord: Bridge to 2030 Plan (2018) and the Open Space and Recreation Plan (2015)

Thoreau, Ralph Waldo Emerson, Margaret Fuller, Louisa May Alcott, and other transcendentalist authors. Residents have committed significant resources towards conserving lands that are considered ecologically or culturally important. While Concord's abundant natural resources and historic asset protection is something to celebrate, extensive wetlands and vigorous efforts to preserve the rural, historic character of the town also limit development.

According to the 2015 Open Space & Recreation Plan (OSRP), 59% of Concord's total land area is considered open space, with 38% of all land in town listed as permanently protected open space.

Concord has a varied mix of land uses, with a high proportion of land devoted to agriculture, open space, and recreation. According to the 2015 Open Space & Recreation Plan (OSRP), 59% of Concord's total land area is considered open space, with 38% of all land in town listed as permanently protected open space. From the Town's GIS and tax assessment data, the most extensive single use within Concord is forest and recreational lands (approximately 38%), closely followed by single-family housing (just over 36%). Commercial and industrial land uses comprise 2.4% of the Town's land. Commercial activity centers include Concord Center, Thoreau Street Depot Area, and West Concord Village. Agricultural and horticultural lands make up 4.5% of land in the town.

GEOLOGY, TOPOGRAPHY, AND SOILS

Concord has a rich diversity of soils, ranging from extensive areas of wet soils, hydric soils, soils with seasonally high water tables, and prime farmland.

Concord's topography ranges from a low of 112 feet, where the Concord River flows into Carlisle, to 365-foot-high Annursnac Hill in the northwest. Concord has a rich diversity of soils, ranging from extensive areas of wet soils, hydric soils, soils with seasonally high water tables, and prime farmland. Sites with seasonably high water tables have been used for pastureland or conservation. The high water table corresponds with hydric soils and shallow depth to bedrock except for Punkatasset Hill. Hydric soils and high water table create ideal conditions for the abundant water resources in Concord, such as the Great Meadows National Wildlife Refuge, but are not suitable for development.

In contrast, Concord's well-drained soils are suitable for cultivation and supporting development such as buildings and roads. Prime farmland has the best physical and chemical properties for producing food. The soils are of the highest quality and can economically

produce sustained high yields of crops when treated and managed according to acceptable farming methods. Additionally, some areas have excessively drained soils. In Concord, surface soils have a localized limiting effect on development through access to drinking water (e.g., public wells), appropriateness for septic systems and wastewater treatment facilities, and occasional steep slopes.

WATERSHED

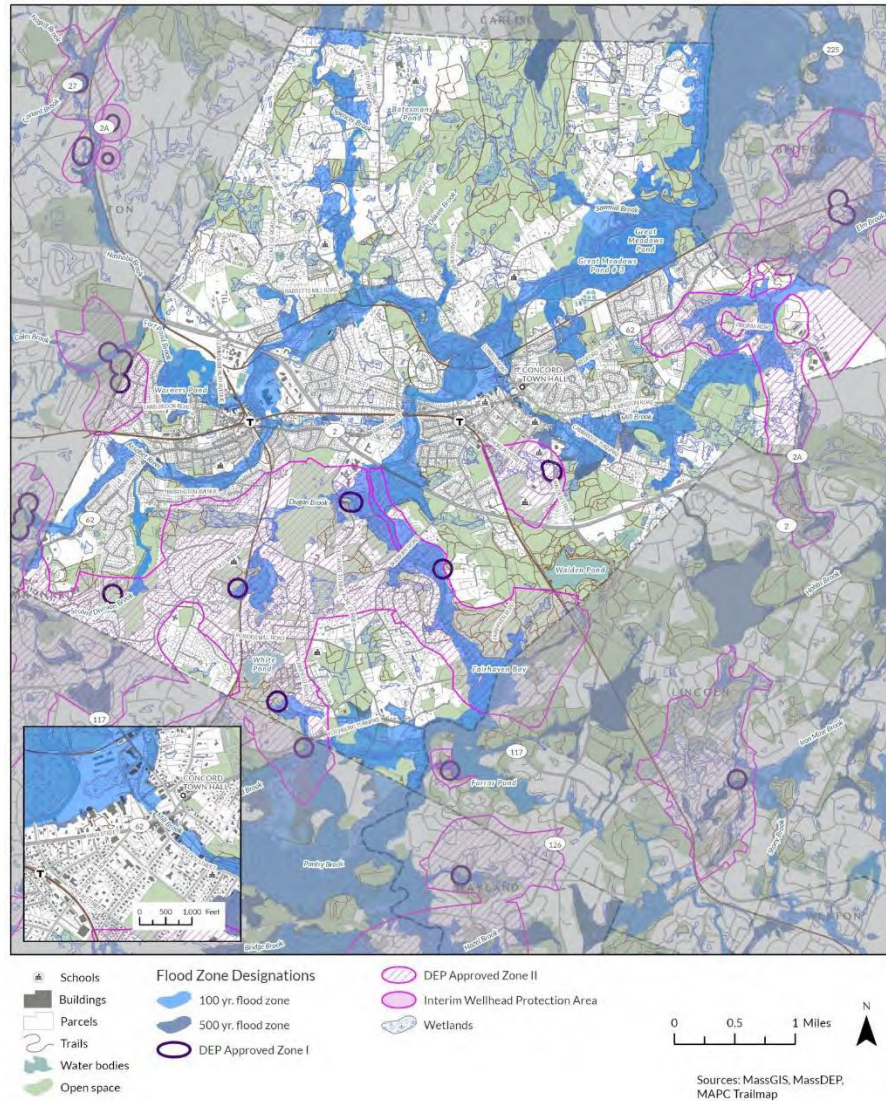
Concord sits within the SuAsCo watershed, consisting of the Sudbury, Assabet, and Concord sub-watersheds. The entire watershed drains roughly 377 square miles of land, affecting 36 municipalities and approximately 365,000 people. The Sudbury River enters Concord at the southern border after originating in the Great Cedar Swamp in the town of Westborough and flowing north through the Sudbury Unit of the Great Meadows Wildlife Refuge. The Assabet River also originates in Westborough and enters the Town at the southwest corner. Both the Sudbury and Assabet Rivers continue north and join to form the Concord River in the center of Town at the confluence point known as Egg Rock. The Concord River continues north for approximately 16 miles before flowing into the Merrimack River in Lowell.

SURFACE WATER BODIES

Besides its three major rivers discussed above, Concord also has many significant streams and brooks: Elm, Mill, Jennie Dugan, Nashoba, Spencer, Second Division, and Saw Mill. Concord also has numerous larger ponds: Walden, White, Silver Hill, Kennedy's, Annursnac, Warner's, and Bateman's Ponds. Smaller ponds include Macone's, Hutchins, and Fairyland Ponds. Ponds are a critical part of Concord's open space and recreational resources on a regional, town, and neighborhood level.

WETLANDS AND VERNAL POOLS

Wetlands are protected by federal, state, and local laws. Filling and draining wetlands, altering the soil, cutting vegetation, and developing land within 100 feet of wetlands or within 200 feet of a perennial stream are regulated and require approval from the Natural Resources Commission (NPC). To help provide both long-term and improved protection of these valuable resources, the Wetlands Bylaw (2009) includes a 25-foot No Disturb Zone policy, requires 100-foot protection to Certified Vernal Pools, and instituted an ability to impose fines. The Commission also continues enforcing a 50-foot No Build Zone policy, first implemented in 2004, to protect wetland resource areas better.



Approximately 50% of the town is under the NRC jurisdiction per the Wetland Protections Act (WPA) and Wetlands Bylaw.

Concord is rich in vernal pools, with 62 Certified Vernal Pools and 158 Potential Vernal Pools, as shown by MassGIS BioMap2 (2022). Vernal pools occur across the landscape where small woodland depressions, swales, or kettle holes collect spring runoff or intercept seasonally high groundwater tables. Some species of wildlife, such as wood frogs, spotted salamanders, and fairy shrimp, are dependent on vernal pools for their breeding and survival. In contrast, other species, such as spring peepers, breed in vernal pools but can breed and survive in different wetland habitats. Vernal pools also support rich and diverse invertebrate fauna. Beginning in 1987, vernal pools were also given some protection under the State's Wetlands

Protection Act (WPA). Approximately 50% of the town is under the NRC jurisdiction per the Wetland Protections Act (WPA) and Wetlands Bylaw.

FLOODING AND CLIMATE CHANGE

FEMA flood maps indicate the 100- and 500-year flood hazard areas in the town (see water resources map). Flooding routinely occurs in Concord, ranging from minor inconveniences to major damage. The town's frequent flooding issues are related to high rain events such as heavy rainstorms, tropical storms, and winter rain, and are related to insufficient or inoperable flood management structures, all compounded during the spring rainy season when natural flood storage areas can be overwhelmed.

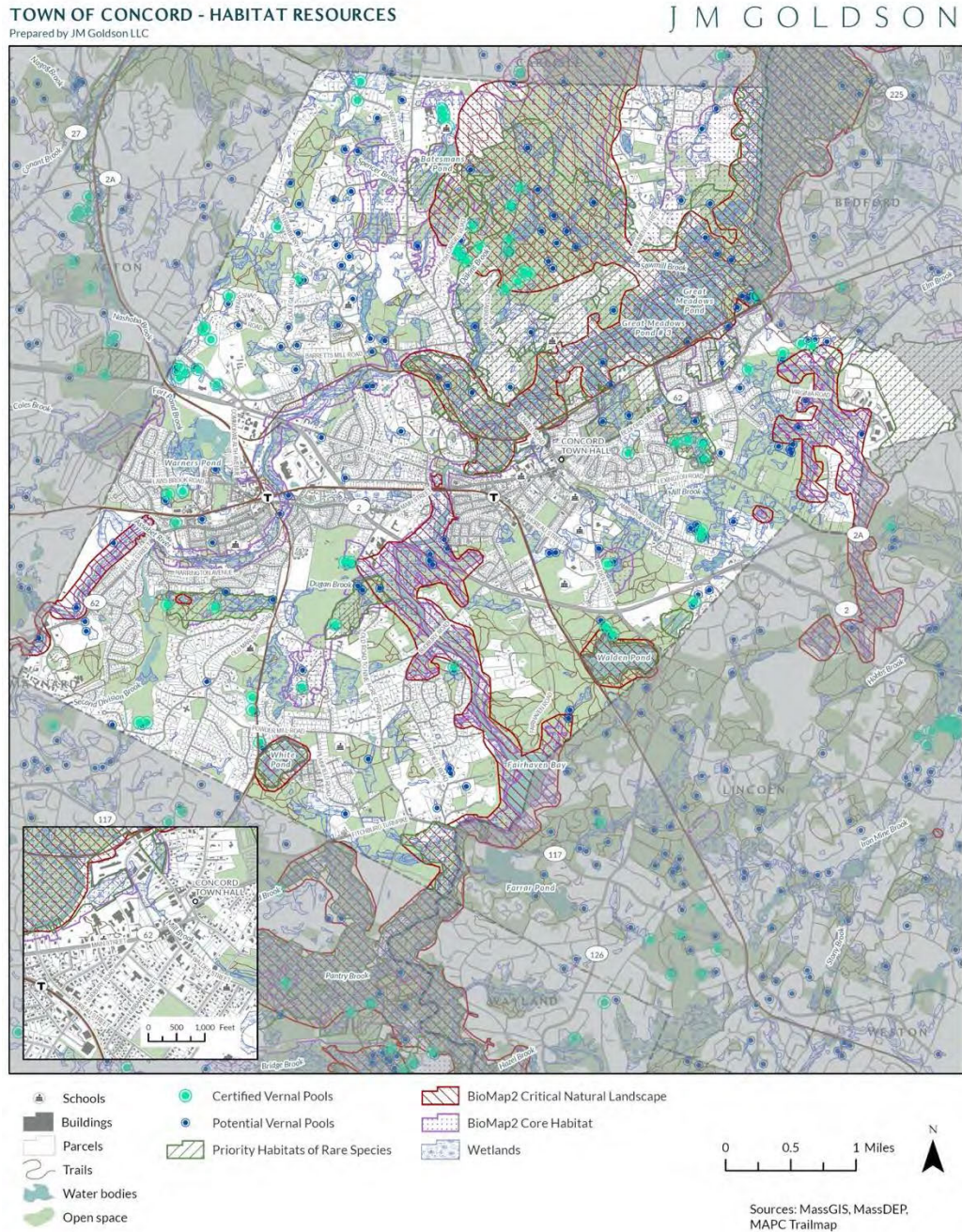
Global climate change will only increase the frequency and severity of flooding events in Concord, as the warming atmosphere can hold and deposit, more considerable amounts of moisture in more severe bursts.

VEGETATION

While Concord's predominant plant communities are characteristic of southern New England, the Town has a higher-than-average diversity of natural communities and flora. Its upland forest matrix of transition hardwoods on well-drained, acidic glacial till and typically includes red oak, white oak, black oak, white pine, black birch, and hickory species. A few healthy, old-growth pines and hemlocks of significant age and size still stand in protected areas of the Town Forest, Estabrook Woods, the Old Rifle Range, and along Conantum's western ridge.

Concord is distinguished by a diversity of wetland communities and plant associations, several of which are classified by the Natural Heritage and Endangered Species Program (NHESP) as priority natural communities that are imperiled or vulnerable, including stretches of small river floodplain forest along its three rivers, alluvial red maple swamp (at Great Meadows), level and kettle hole level bogs (most notably Gowing's Swamp, Bose's Meadow, and Jenny Dugan Kames bog), and acidic fens (the Andromeda Ponds and Heywood Meadow, west and southwest of Walden Pond). In addition, Concord has extensive shallow and deep emergent marshlands, numerous shrub and red maple swamps, wet meadows, highbush blueberry thickets, and inland acidic pond shore habitat. Gowing's Swamp is the most floristically diverse and intact bog remaining. Care should be taken to minimize the future impact on the bog by any alteration of the surrounding water table or its water chemistry, by localized exposure to sulfur dioxide emissions, by rapidly encroaching invasive plant species along its shoreline, and by the impacts of increased use of shoreline trails and egress onto the bog mat by the public and visiting dogs.

Three areas in Town support interesting pockets of locally rare flora due to calcite outcrops and circumneutral soils, including Estabrook Woods (from Punkatasset Hill to Mink Pond, the lime quarries, and Bateman’s Pond), Conantum, and on the east side of Annursnac Hill. Impacts to these areas can be mitigated with mindful town planning, land management, and public education, while others are more complex, longer-term, systemic problems need further study and broader resolution.



The mature trees that are found throughout the landscape in Concord define the character of the community and the historic feel of the Town. Entrusted with managing such a precious

resource, Concord Public Works has made significant investments throughout the years in properly caring for the urban forest. Some of these investments include having Town staff managing the trees, completing most of the maintenance work in-house, and when a removal is necessary, Concord Public Works tries to plant a new tree to replace the removed tree, subject to available funding. In 2017, Davey Resource Group inventoried and evaluated 23,781 trees planted within the public street right-of-way (ROW), public parks and public facilities. This was the first town-wide public shade tree inventory and assessment conducted in the Town of Concord³¹.

RARE AND ENDANGERED SPECIES

Although no state-listed Areas of Critical Environmental Concern exist in Concord, the Town has 54 state-listed species of conservation interest according to the Natural Heritage Endangered Species Program (NHESP). The list compiled in NHESP's updated *Rare Species Viewer* (2020) gives a current list of the species of concern in Concord today.

SCENIC AND HISTORIC RESOURCES

Concord is well-known for the extent, quantity, diversity, and quality of its historical and cultural resources. Six historic districts, many isolated National Register structures, Walden Pond, Minute Man National Historical Park, five large agricultural areas, and the abundant protected areas help define the town's special character. The Town's 2016 Demolition Review Bylaw covers buildings outside of the Local Historic Districts built before 1941 and on the National Register or State Register and/or in Concord's Survey of Historical and Architectural Resources, which is the Town's record of historic structures and areas of historic interest.

Historical resources have been effectively managed by independent organizations and by Town government through the Historical Commission and Historic Districts Commission. Outside of the established historic districts, large numbers of historic homes are unprotected from alteration or demolition. There is real concern amongst Concord residents that these homes will undergo small or incremental changes, or even be replaced by much larger homes that disregard local context, that will gradually erode town character.

Approximately 20% of Concord's 8,374 buildings are surveyed, listed, or protected in some way.

³¹ https://concordma.gov/DocumentCenter/View/11621/Concord-Management-Plan-with-intro--Draft-11_29_2017

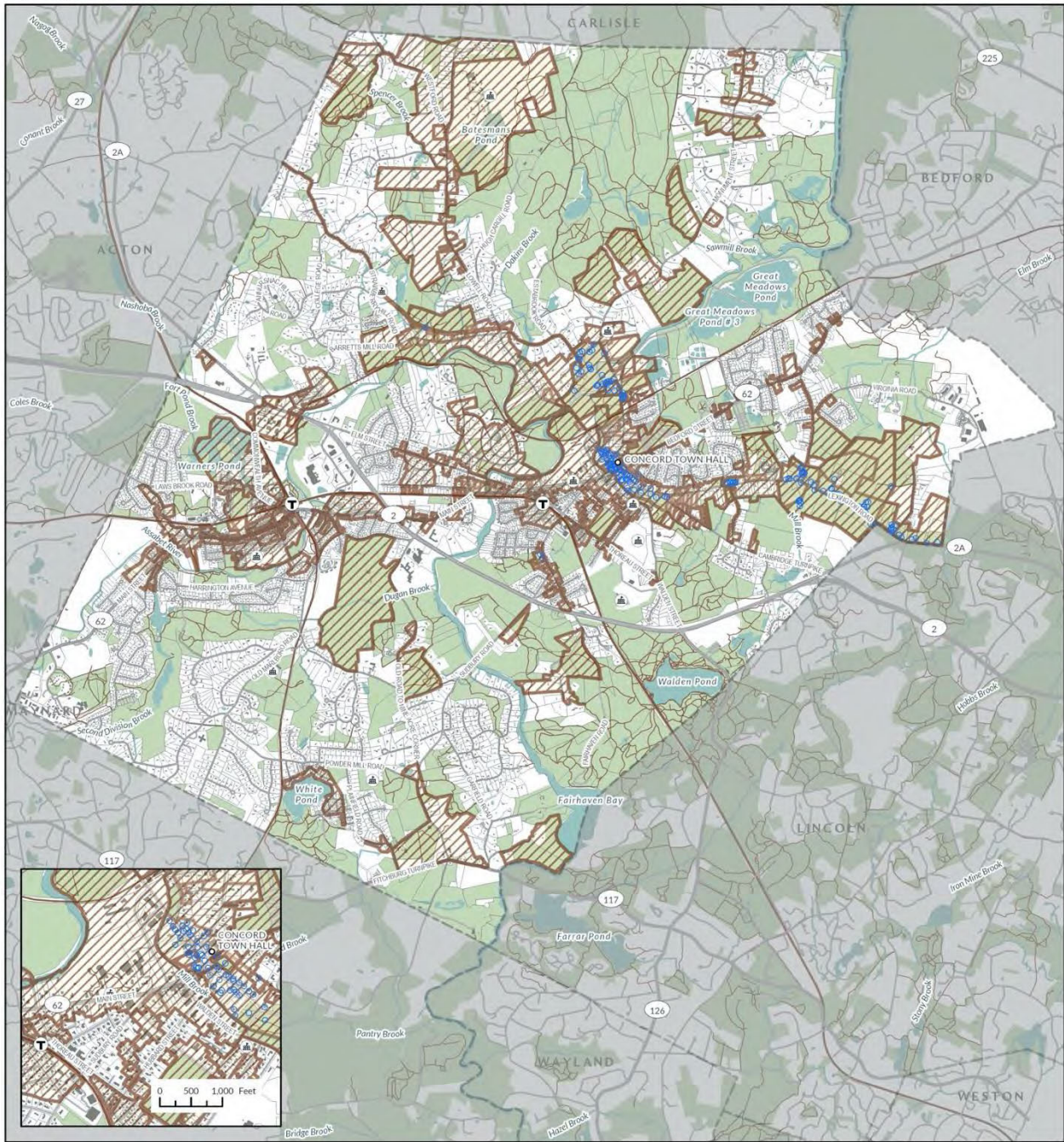
The Massachusetts Cultural Resource Information System (MACRIS) data maintained by the Massachusetts Historical Commission (MHC) lists 1,925 historic resource records for Concord, of which 136 are multi-building areas, 1,635 are individual buildings, and 104 are “structures,” such as bridges, mausoleums, fences, walls, gates, road/path systems, fields, etc. There are currently three National Register Districts and 24 other individual sites on the National Register, including six National Historic Landmarks.

In 1999, Congress specifically designated the three rivers for their “outstanding ecology, history, scenery, recreation values, and place in American literature.” The Sudbury-Assabet-Concord Wild and Scenic River status describes the rivers in Concord as an historic and cultural resource. It is the only river system in the country to be designated for literature and history!

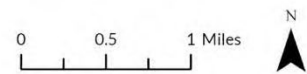
HAZARDOUS WASTE SITES

As of April 2022, Concord has 714 confirmed waste sites and reportable releases registered with the Massachusetts Department of Energy and Environmental Affairs, almost all of which are closed. There are 14 sites currently listed on the EEA website with Activity and Use Limitations (AULs), mostly at the Concord Public Works garage but also at several local gas stations, the Concord-Carlisle High School Parking Lot, and the Emerson Hospital. The EPA Superfund site at 2229 Main Street (formerly, StarMet and Nuclear Metals Inc. or NMI) is undergoing remediation designed to bring the land up to a residential use standard. The Town of Concord will be able to take title to this land within the next 5 years and could conceivably use a portion of the 46-acre site for housing or other municipal purposes.

Concord Public Works maintains the former landfill for a variety of uses to benefit the community: yard waste recycling, Styrofoam collection, paint disposal, snow storage, invasive plant disposal, equipment storage, and a portable shooting range used for police training.



- Schools
- Buildings
- Parcels
- Trails
- Water bodies
- Open space
- National Register District Site
- MassHistoric Commission Inventory Districts



Sources: MassGIS, MassDEP, MAPC Trailmap

INFRASTRUCTURE CAPACITY

WATER AND SEWER³²

Almost all Concord residents have access to town water, and about 35% of the town residents have access to sewer.

Concord's water system was established in 1872. The system consists of 6 groundwater supply wells and 1 surface water supply (in Acton), pumping stations, 2 storage reservoirs with 7.5 million gallons of capacity, and approximately 121 miles of water main serving approximately 95% of Concord residents, as well as a small population in Carlisle and Acton. Depending on the season, all available production facilities may be called upon to satisfy system demands that fluctuate from 1.5 million gallons per day in the winter to over 4 million gallons per day in the summer.

Concord's sewer system was originally established in 1900. The system includes a 1.2 million gallon-per-day centralized wastewater treatment facility, 2 sewer pumping stations, 6 sewer lift stations, and approximately 33 miles of sewer collection system. The system currently serves 1,692 customers or approximately 35% of the Town.

Wastewater treatment is a constraint to development in most areas of the town.

SCHOOLS

A description of educational facilities and enrollment are presented in the Demographic Profile chapter.

TRANSPORTATION

Roads: Major roadways in Concord, including Routes 2, 62, and 117, Elm Street, Cambridge Turnpike, and Lexington Road, allow residents easy access to downtown Boston and surrounding communities for work and leisure, as well as ample access for visitors from outside of town. Heavy dependence on privately-owned vehicles imposes hardships on the people who cannot afford cars or do not drive (e.g., students, seniors, lower-income individuals, and disabled individuals). People with limited access to cars may also be disadvantaged because of resulting limits on access to services, food, and jobs.

³² <https://concordma.gov/322/Water-Sewer>

Transit: The MBTA Fitchburg commuter rail line has two stops in Concord in two of the three village centers and serves as an important and attractive means of travel for residents commuting to and from work (primarily in Boston) and for visitors and employees coming to town. The Yankee Line, Inc. runs two commuter buses Monday-Friday from Crosby's Supermarket to Copley Center in Boston with occasional modifications in service.

Concord is served by the MBTA Commuter Rail with service to Boston from two stations.

Sidewalks and Bikeways: Concord has an extensive network of sidewalks, trails, and bikeways that residents utilize throughout town; however, the connectivity of these pathways could be improved. While there have been many requests for sidewalks and bike lanes as part of this planning effort, street layout and construction vary widely throughout the town, and only select roadways can be improved to accommodate "Complete Streets."

Concord is a destination for cyclists attracted to its beauty, terrain, cultural sites, shopping, dining, and recreational resources.

The Minuteman Bikeway (which currently ends in Bedford at the Bedford Depot) and the Bruce Freeman Rail Trail (which connects to Lowell in the north and eventually to Framingham in the south) allows some riders alternatives to roads, but also bring cyclists to Concord's streets and sidewalks. The Concord Reformatory Branch Trail, which is a natural path starting at Lowell Road over the Mill Brook Way then continuing over Monument Street to the Bedford town line, is also used by cyclists. There is a need for additional facilities in Concord to support cyclists and ensure that cyclists, pedestrians, and cars can safely coexist.

Safe Routes to Schools: The elementary schools and the middle school in Concord currently participate in MassDOT's Safe Routes to Schools (SRTS) program.

Private Shuttles: Concord previously had a shuttle bus system that was discontinued due to low levels of ridership. Today, there are a limited number of private shuttles that are run by Concord businesses solely for employee or client use. Several social service providers offer van services to assist their clients who do not drive; however, the funding for these transportation services are either grant-specific or have other limitations in place that restrict service providers to only using their vans/buses for their constituents. A seasonal trolley service connecting the main tourist sites with the MBTA stations is being piloted in 2022. Continuation decisions will be made in 2023.

Council-on-Aging Vans: The Council on Aging (COA) shuttle service is available for residents who are 60 years old or above for medical and shopping destinations, as well as COA programs and activities. The service is available by appointment only from Monday through Friday. There is a minimal suggested donation for trips with a recommendation to make appointments early since times can be booked months in advance.

Ride Sharing: Ride sharing services and the prevalence of access to smart-phone apps will be an important factor in future transportation services and may further erode the usefulness of private shuttles. However, any reduction of overall traffic and congestion from single-occupancy vehicles is preferable both for quality of life and the Town's sustainability goals.

REGULATORY BARRIERS AND CONSIDERATIONS

In addition to environmental and infrastructure factors that affect development, local policies and regulations directly impact the location and physical attributes of development opportunities. Local zoning and land use policies are the two primary regulatory tools that can affect housing production in addition to other local regulations including local wetlands ordinances, Local Historic Districts, and the like. The Concord Zoning By-law describes the regulations that are applied to parcels of land and directs property owners on what can and cannot be done with their land. Zoning regulates which uses are permitted on the parcel, where a structure can be placed on a parcel, how tall a structure can be, how much parking is required, how much open space must be provided, and signage. These regulations shape the built environment and the mixture of uses across the community.

ZONING REGULATIONS

Most the town is composed of residential (mainly single family) uses. Immediately adjacent to the village centers, there are dense residential neighborhoods with homes of various ages and styles that largely define community character in those areas. There are also three industrial zones in Concord located along Route 62/Main Street, in West Concord by Baker Avenue/Route 2, and on the eastern side of the town adjacent to Hansom Air Force Base.

LAND AREA DISTRIBUTION BY LAND USE³³

Land Use Category	%	Acres
Hanscom Field/Airbase	2.6	423
Agriculture/Horticulture	4.5	746
Civic/Institution	6.5	1,074
Commercial	1.8	305
Industrial	0.6	107
Forest (Ch.61)/ Recreational (Ch. 61B)	38.7	6,390
Residential - Multifamily (2-3 Units)	0.4	67
Residential - Multifamily (4+ Units)	1.1	177
Residential - Single Family	36.8	6,080
Unlabeled Parcels/ Roadways	6.9	1,137
Total	100	16,505

Concord adopted its first zoning bylaw in 1928 which included four districts: industrial, business, general residence, and single residence. Concord’s zoning regulations have had regular amendments in the last decade to begin to address a variety of concerns.

³³ Envision Concord: Bridge to 2030 (2018), Table 7: Land Area Distribution by Land Use, based on Town of Concord GIS and Tax Assessment Data

Amendments since the last Housing Production Plan in 2015 have responded to the replacement of smaller homes with larger houses, the need for mixed-use redevelopment and other types of development in the village centers (particularly West Concord Village), and climate-related issues, such as impacts on wetlands and flood plains.

In 2020, zoning was changed to expand the potential for development of attached and detached accessory dwelling units. In 2021, the bylaw was further amended to allow a two-family dwelling by Special Permit in the Residence C Zoning District, and to allow the Zoning Board of Appeals to reduce the requirement for two parking spaces for each dwelling unit.³⁴

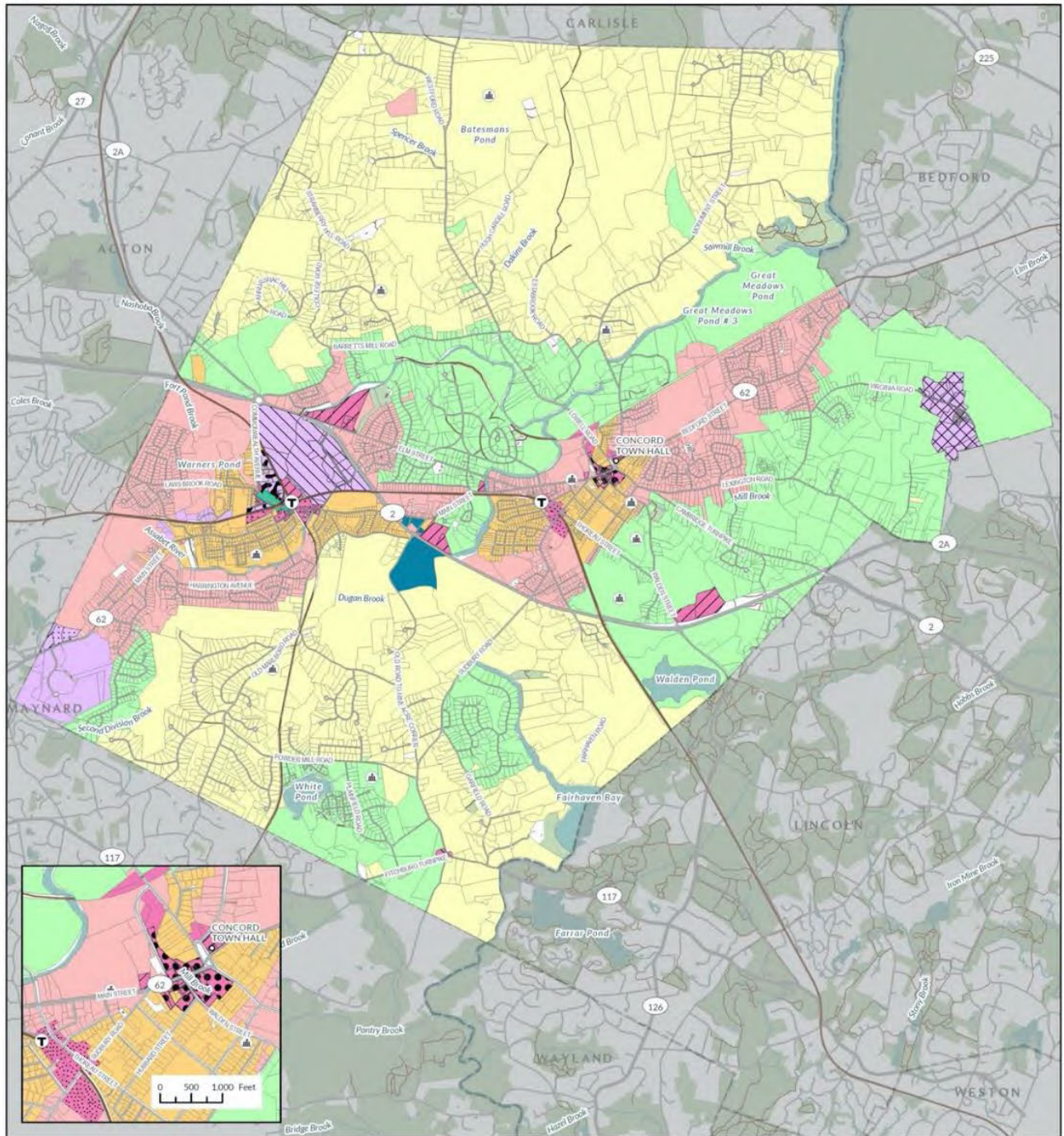
The Zoning By-law now includes six classes of zoning districts: residential, commercial, limited business, medical-professional, industrial, and conservancy districts. Each major class of zoning has several sub-zones reaching a total of 29 base zoning districts and 3 overlay districts. The following provides a description of each zoning district and discusses their general purpose and allowable uses. Many uses in Concord require special permit by approval of the Zoning Board of Appeals (BA), which is the special permit and variance granting authority.

³⁴ Concord Zoning Bylaws, 2021.

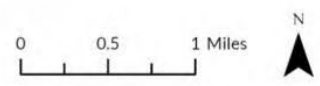
TOWN OF CONCORD - ZONING

Prepared by JM Goldson LLC

J M GOLDSON



- | | | | |
|--------------|-----------------|-------------------------|---------------------------|
| Schools | ZONING | Industrial Park A | Nine Acre Corner Business |
| Buildings | Residence A | Industrial Park B | Thoreau Depot Business |
| Parcels | Residence AA | Limited Industrial Park | West Concord Business |
| Trails | Residence B | West Concord Industrial | Medical Professional |
| Water bodies | Residence C | Business | West Concord Village |
| Open space | Industrial | Concord Center Business | |
| | Industrial Park | Limited Business | |



Sources: MassGIS, MassDEP, MAPC Trailmap

Residential Districts

The residential class includes four districts, which require varying lot sizes from 80,000 sq. ft. to 10,000 sq. ft.: residence AA, A, B, and C. Residence AA is in the northwest and southeast portions of Town and primarily consists of agricultural lands and large-lot single-family subdivisions. The minimum lot area in this district is 80,000 square feet.

The only residential uses allowed by-right in residential districts are single-family dwellings.

Residence A provides a gradual step in density between AA and B and primarily surrounds the denser B and C zones in the central spine of the Town. In addition, A is located in three isolated areas in the southern part of Concord. Residence A allows a minimum lot area of 40,000 s.f.

Residence B is located closer to Concord's dense central spine (Route 62, or Main Street). This district allows a minimum lot area of 20,000 s.f.

The final residence district is C. This district allows a minimum lot area of 10,000 s.f. Single-family dwellings are once again the only use allowed by-right in this district, although two-family homes are now allowed as a special permit. The special permit for conversion to a two-family does not expire upon transfer of ownership.

Concord's zoning bylaw also allows Residential Cluster Development and Residential Compounds by special permit in all the residential and business districts. The Residential Cluster Development provision allows for more compact development of single-family dwellings on larger tracts of land. It also allows for greater density and reduction in open space requirements in return for donating a lot(s) to the Town for affordable housing. Residential Compounds do not require any deed restricted affordable housing.

Concord's zoning bylaw provides some flexibility for Planned Residential Development (PRD). Planned residential developments allow for single-family detached, attached dwellings, or multi-unit structures of all types in accordance with Section 10 of the zoning bylaws in all Residential and Business Zones.

Description of existing housing supply and trends can be found in the Housing Conditions chapter.

Multifamily and Accessory Unit Overview

Except for the Planned Residential Development zoning provisions and two-family dwellings, current zoning limits the development of more flexible housing types, such as multi-family dwellings and limits greater density on lots.

Zoning is a major constraint in diversifying Concord's housing efforts, because over 90% of the town is zoned for residential use, and the development pattern has been primarily single-family housing.

Detached accessory units, which require a special permit from the Town, have allowed additional units to be added within existing neighborhoods zoned for single-family through the conversion of existing accessory structures that pre-date 1928 (e.g. barns, carriage houses or garages). Special permits have also allowed in-home accessory apartments to be created, increasing the number of additional units in Concord without adding to the number of buildings or substantially altering the appearance of the Town. Previously, the special permit for an accessory unit would expire upon sale or transfer of equity interest in the property to another owner. However, zoning changes at the 2022 Annual Town Meeting ended this expiration provision.

Accessory Apartments (ADUs) are allowed by right in all Residential Districts.

Description of existing housing supply and trends can be found in the Housing Conditions chapter.

Affordable Housing

In the time since 2015, when the Housing Production Plan was last prepared, the Town has accomplished many housing initiatives. Accomplishments include advocating for and establishing an Affordable Housing Trust in 2021, funding the trust with an annual appropriation of \$500,000 (totaling \$2 million and counting), moving forward home rule petitions to further fund the trust, and adopting interim policy guidelines which were approved by the Select Board in 2022. Description of existing Subsidized Housing Inventory and pipeline can be found in the Housing Conditions chapter.

Commercial, Limited Business, and Medical-Professional Districts

The Commercial and Limited Business Districts allow combined business/residence uses by right³⁵. This use allows multi-family housing when combined in the same building with commercial uses. It also requires that at least 20% of the dwelling units be affordable.

Industrial Districts

No residential uses are allowed in these districts as a right. The West Concord Industrial and Industrial Districts allow combined industrial/business/residence uses as a special permit. Combined industrial/business/residence are also allowed as a special permit in Industrial Park #1, and alternative Planned Residential Developments are allowed in Limited Industrial Park #2 as a special permit and with Town Meeting authorization.

Conservancy Districts

The Conservancy Districts and the Wireless Communication Facility(s) Overlay District are overlay districts whose boundaries are superimposed on the Residential, Commercial, Industrial and By-Pass Districts established by this Bylaw. Any developments must be located outside of the Flood Plain Conservancy District and Wetlands Conservancy District.

³⁵ Except for no ground-floor residential is allowed in West Concord Village, no residential is allowed in Limited Business #4, and a special permit is required in the Medical Professional district.

CHAPTER 6: IMPLEMENTATION CAPACITY AND RESOURCES

This chapter describes local and regional capacity and resources for the implementation of affordable housing initiatives, including local and regional housing organizations and funds. The Town of Concord has numerous organizations with a focus on supporting community housing, including local government entities and non-profit organizations, as well as regional agencies that facilitate housing initiatives. Concord stands out from other towns in both the number of housing entities, the coordination efforts among the different groups, and the funding commitments put forth, especially in recent years.

KEY FINDINGS

- Between the subsidized units in public housing and the Section 8 programs the Concord Housing Authority operates 228 units and serves more than 375 people.
- Since its inception, the Concord Housing Foundation has raised almost \$1,000,000.
- In total, the Community Preservation Committee has appropriated \$27.1 million across all CPA categories, with 22% spent towards community housing per the 2020 CPA plan. Significant CPA funding is expected to continue in the future. In particular, the \$1M in CPA funding previously allocated to Junction Village and 2022 CPA funding allocated to the Assabet River Bluff acquisition.
- The Concord Housing Development Corporation sponsors affordable housing projects, most recently the Assabet River Bluff housing/open space land acquisition project.
- This Regional Housing Services Office serves as a long-standing model for other housing services offices in the state.
- The recently created Housing Trust currently has \$2 million allocated to it and an estimated \$2.2-\$2.4 million available per year if the legislative petition is approved for a real estate transfer fee. to use towards affordable housing. Since its inception in 2021, the Trust has committed \$945,000 towards 4 different projects, assisting in creating 8 new units of subsidized housing.
- The Concord Housing Roundtable is a unique example of coordination and collaboration between municipal housing groups.

LOCAL CAPACITY AND RESOURCES

CONCORD HOUSING AUTHORITY

The Housing Authority was established in 1961. Its mission is to develop and manage safe, good-quality, affordable homes for low and moderate income and individuals and families while promoting community and self-reliance. The Concord Housing Authority operates more than 132 units across scattered sites throughout the community.

CONCORD HOUSING AUTHORITY UNITS

Development Category	Name	# Units
State Elderly	Peter Bulkeley Terrace	28
State Elderly	Everett Gardens	32
State Elderly	Everett Gardens Extension	20
State Family	Scattered 2,3,4 Bedroom Sites	28
Project-based Section 8	Scattered 1,2,3,4 Bedroom Sites	18
Local Units	Scattered 1,2,3 Bedroom Sites	6
Total		132

The Concord Housing Authority also administers (85) Section 8 vouchers, which can be used in any community and do not count towards the Subsidized Housing Inventory. The CHA participates in the Centralized Section 8 Waiting list. The housing choice voucher program is the federal government's major program for assisting very low-income families, the elderly, and the disabled to afford decent, safe housing in the private market. The Concord Housing Authority operates 132 units of public housing and administers 85 Section 8 vouchers, assisting more than 375 people.

CONCORD HOUSING FOUNDATION

The Concord Housing Foundation was established in 2001 as a non-profit 501c3 corporation dedicated to community outreach, education, and fundraising for affordable housing. It was originally created to support the Concord Housing Development Corporation (CHDC) and now also supports the Concord Municipal Affordable Housing Trust Fund, created in 2019. Its mission is through financial and other support, to preserve and create housing options that are affordable for households with a wide range of limited incomes, and thus protect the diversity of Concord's community.

Since its inception, the Foundation has raised almost \$1,000,000.

Funds have supported a variety of affordable housing projects including:

- 7 new homes on Baker Avenue and Gifford Lane
- 3 new homes on Old Bedford Road
- Lalli Woods houses, off Elm Street
- buying down a unit in an Elm Street development to make it affordable
- renovations at Peter Bulkeley Terrace (owned by the Concord Housing Authority)
- Walden Homes (5 homes behind the Concord Police/Fire Station)
- renovation of two housing units in the old McGrath Farmhouse for the farmers running Barrett's Mill Farm (where the agricultural land is owned by the town)
- Elm Brook, affordable small single family homes near Thoreau's birthplace on Virginia Road

COMMUNITY PRESERVATION COMMITTEE

Concord adopted the Community Preservation Act at the 2004 Town Meeting. The Concord Community Preservation Committee was appointed in January 2005 to administer the CPA. The CPC is comprised of nine members. The Historical Commission, Housing Authority, Natural Resources Commission, Planning Board, and Recreation Commission each designate a member from their boards, and four at-large members are appointed by the Select Board. CPA funds may be used for the acquisition, creation, preservation and support of community housing. Housing affordability and housing needs are described in the most recent Community Preservation Plan (2020). The CPC has two main goals as it relates to community housing:

GOAL 1: Develop realistic, achievable targets for preserving or creating housing of all types (beyond the State Housing Inventory).

GOAL 2: Develop additional, self-sustaining funding mechanisms to support achieving the housing targets developed in Goal 1.

Since 2015, the Community Preservation Committee has funded the following community housing projects:

- Ongoing funding Concord's contribution towards the Regional Housing Services Office
- Funding an affordable housing buy down program which allows the Concord Housing Development Corporation to buy a unit to add to the affordable housing stock
- Funding reserves for future community housing projects

- Funding the construction of a two-bedroom single family home for the purposes of affordable housing
- Funding towards Phase II of the Peter Bulkeley Terrace Renovation
- Funding a Housing Production Plan update

In total, the Committee has appropriated \$27.1 million across all CPA categories, with 22% spent towards community housing per the 2020 CPA plan.

Significant CPA funding is expected to continue in the future. In particular, the \$1M in CPA funding previously allocated to Junction Village and 2022 CPA funding allocated to the Assabet River Bluff acquisition.

CONCORD HOUSING DEVELOPMENT CORPORATION

The Concord Housing Development Corporation (CHDC) is a nonprofit housing corporation established by Chapter 275 of the Acts of 2006 and formed in 2007. It is a non-profit entity with its board members appointed by the Concord Select Board. The CHDC has the purpose of investigating and implementing alternatives for the provision of affordable housing for persons of low, moderate, and middle income and others whose needs may be identified from time to time in the town. The CHDC has a Small Grant Program designed to aid Concord residents in making repairs and alterations to their homes for safety and health reasons.

The Concord Housing Development Corporation sponsors affordable housing projects, most recently the Assabet River Bluff housing/open space land acquisition project.

REGIONAL HOUSING SERVICES OFFICE

The Regional Housing Services office was established in 2011. Currently, it serves the towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, and Weston. It operates under an inter-municipal agreement to serve member towns and assist residents. The office does proactive affordable unit monitoring, program administration, and project development.

This Regional Housing Services Office serves as a long-standing model for other housing services offices in the state.

CONCORD MUNICIPAL AFFORDABLE HOUSING TRUST

The Concord Municipal Affordable Housing Trust (CMAHT) complements the Town's existing affordable housing efforts, entities and programs, and can act quickly when affordable

housing opportunities arise. The CMAHT has 5 trustees, including a member of the Select Board and the Town Manager. Select Board approval is needed for Trust to borrow money; mortgage or pledge trust assets; purchase, accept, sell, lease, exchange, transfer, abandon, convey interest in real, personal, mixed property; or to amend the Trust. The Bylaw directs Trustees to “develop policy goals and statements, consistent with the Town’s adopted housing goals, and subject to approval by the Select Board, to serve as guidelines for the Trust. . Interim guidelines for the Trust were adopted in 2022. Updated guidelines will be promulgated following adoption of this updated Housing Production Plan.

In 2017, Town Meeting voters established an Affordable Housing Funding Committee whose package of recommended measures were approved by Town Meeting. In 2019, the package including accepting the Municipal Affordable Housing Trust statute, authorizing the filing of two home rule petitions to fund the trust, and approving an initial annual appropriation \$500,000.

In 2019, Town Meeting voters filed two home rule petitions for dedicated funding for the Trust: for a real estate transfer fee and a building permit surcharge - -- which were refiled for the 2021-2022 legislation session.


- Affordable Housing Funding Committee had estimated the home rule petitions would bring in an estimated \$2.2-\$2.4 million per year to the Trust
- Both bills reported out favorably by committee but not enacted by either the house or senate; January 19, 2023 Special Town Meeting is being asked to refile for the 2023-2024 legislative session.

From 2019-2020 the Select Board appointed an Affordable Housing Trust Study committee, who drafted a bylaw., which was approved at the 2020 town meeting and subsequently approved by the Attorney General in February 2021. The Select Board made appointments to the Concord Municipal Affordable Housing Trust (CMAHT) which first convened in September 2021. The declaration of trust was filed in November of 2021. In 2022, the Trustees adopted interim policy guidelines, which were approved by the Select Board. Town Meeting voters have approved annual appropriations of \$500,000 in 2019, 2020, 2021, and 2022—for a total of \$2,000,000 thus far—which have been committed for affordable housing projects by the Select Board and, since December 2021, by the Concord Municipal Affordable Housing Trust (CMAHT). The Select Board and CPC are recommending \$2.04-million released from Christopher Heights at Junction Village be added to the Trust by the 2023 Town Meeting.

Town Meeting voters have thus far allocated \$2,000,000 for the Concord Municipal Affordable Housing Trust, and filed home rule petitions which might add some \$2.2-\$2.4 million available per year to use towards affordable housing.

Since its inception in 2021, the Trust has committed \$945,000 towards 4 different projects, assisting in THE EVENTUAL creation of 7 new units of subsidized housing.

Table Summarizing Municipal Affordable Housing Trust Revenues and Expenses 2019-2022

	REVENUES	BY FUNDING SOURCE			
	2019-2022	Annual Town Meetings (4 @ \$500,000)			\$2,000,000
1/4/21	Donation to AHTF			25,000	
		<i>Sub-total</i>			\$2,025,000
EXPENSES	BY PROJECT		<i>applicant</i>		
7/1/19	930 Main St (2 units)		CHDC	\$(150,000)	
7/29/19	Gerow – design feasibility		CHA	(50,000)	
2/22/21	Emerson Annex (1 unit)		RHSO/Town	(95,000)	
1/6/22	Assabet River Bluff (5 units)		CHDC	(650,000)	
10/4/22	Christopher Heights (83 units)		CHDC	(1,000,000)	
10/25/22	Christopher Heights (83 units)		<i>decommit</i>	1,000,000	
		<i>Sub-total</i>			\$(945,000)
		UNCOMMITTED BALANCE			\$1,080,000

CONCORD HOUSING ROUNDTABLE

The Concord Housing Authority, Concord Housing Foundation, Concord Housing Development Corporation, and now the Concord Municipal Affordable Housing Trust boards convene twice a year – facilitated by the Regional Housing Services Office -- as the Concord Housing Roundtable.

The Concord Housing Roundtable is a unique example of coordination and collaboration between municipal housing groups.

TOWN PLANNING STAFF

Concord’s Planning Staff includes a Director of Planning and Land Management, a Town Planner, two Senior Planners, and two Administrative Assistants. One of the Senior Planners devotes some of her time to administration work for the Community Preservation Committee.

LOHA COALITION

The Local Option for Housing Affordability (“LOHA”) Coalition is working to create and support affordable housing with a real estate transfer fee. The LOHA Coalition is comprised of the following cities and towns: Boston, Concord, Somerville, Nantucket, Brookline, Provincetown, Chatham, Cambridge, and Arlington.

LEAGUE OF WOMEN VOTERS

In January 2019, the League of Women Voters of Concord-Carlisle Housing Issues Committee met with the Town about the need for more affordable housing in Concord. In coordination with the Town, the Housing Issues Committee researched publicly owned properties which might provide some opportunities for affordable housing. They presented this report to the Town in 2021. The full list of these sites, and the Town Planning staff response is in the Appendix. Select sites are described in the Goal and Strategy chapter.

APPENDICES

CONCORD SUBSIDIZED HOUSING INVENTORY

Development Name	Address	DHCD ID #	SHI Units	Rent or Own
365 Commonwealth Ave	365 Commonwealth Ave Concord, MA 01742	n/a	0	Rent
405 Old Bedford Road	409 -417 Old Bedford Road Concord, MA 01742	9381	4	Rent
930 Main Street	930 Main Street Concord, MA 01742	10718	2	Own
Baker Homes	Baker Ave and Gifford Lane Concord, MA 01742	9015	7	Own
Black Birch II	Black Birch Lane Concord, MA 01742	n/a	0	Own
Brookside Square	50 Beharrell Street Concord, MA 01742	9834	8	Rent
Burke Farm	Old Bedford Road Concord, MA 01742	9016	3	Own
Community Housing Options	22 West Street Concord, MA 01742	800	20	Rent
Concord Commons	Conant Street Concord, MA 01742	9017	3	Own
Concord Homes	Peabody Ct/Fuller Ln/Dunbar Way Concord, MA 01742	803	5	Own
Concord Housing Authority - Federal Family Scattered Sites	199-205 Conant St, 23 Cottage St, 14-16 Bedford Ct, 277-279 Commonwealth Ave, 1031 Main St, 405 Bedford St, 156 Peter Spring Rd, 145 Powder Mill Rd, 102 Upland Rd. Concord, MA 01742	4774, 4778, 4777, 4776, 4779, 4775, 4780, 4782, 4781	18	Rent

Concord Housing Authority - State Family Scattered Sites	282 Thoreau St, 151 Strawberry Hill Rd., 39A Bedford St, 275 Walden St & 35 Grove St, 33C Westvale Meadow, 4 Bartkus Farm Rd Concord, MA 01742	791, 796, 797, 798, 799	35	Rent
Concord Park	68 Commonwealth Avenue Concord, MA 01742	n/a	0	Rent
Concord Walden Condominium	Walden Street Concord, MA 01742	9382	5	Own
DDS Group Homes	Confidential Concord, MA 01742	4249	23	Rent
Elm Brook	Elm Brook Concord, MA 01742	9385	3	Own
Elm Place	Elm Street Concord, MA 01742	9384	2	Own
Emerson Annex	Stow Street Concord, MA 01742	802	10	Own
Emerson Annex Rental	Stow Street Concord, MA 01742	801	1	Rent
Everett Gardens	34 Everett Street Concord, MA 01742	794	32	Rent
Everett Gardens Expansion	Concord, MA 01742	793	20	Rent
Fairhaven Gardens	Abbot Lane (aka 1000 Concord Turnpike) Concord, MA 01742	4784	42	Rent
Finigan Way	Strawberry Hill Rd Concord, MA 01742	9143	6	Own
Granite Post/Old Bedford Road	Old Bedford Road (Granite Post Rd) Concord, MA 01742	9658	1	Own
Junction Village	6X Winthrop Street Concord, MA 01742	10142	0	Rent
Lalli Woods	Elm Street Concord, MA 01742	9383	3	Own
Millstone Concord	1888 Main St Concord, MA 01742	9951	1	Own

Peter Bulkeley Terrace	115 Stow Street Concord, MA 01742	795	28	Rent
Riverbend Condo	78 Forest Ridge Rd Concord, MA 01742	10612	1	Own
Riverbend Condo Rental	101 Forest Ridge Rd Concord, MA 01742	n/a	0	Rent
Riverwalk	1641 Main Street Concord, MA 01742	n/a	0	Own
Shaw Farm Village	Shaw Farm Road Concord, MA 01742	9647	2	Own
The Prescott (Concord Mews)	48 Old Powdermill Rd Concord, MA 01742	9044	350	Rent
Warner Woods	247 Laws Brook Road Concord, MA 01742	3704	80	Rent
Westvale Meadows	1691 Main Street Concord, MA 01742	n/a	0	Own

DHCD AFFIRMATIVE FAIR HOUSING GUIDELINES

The Commonwealth of Massachusetts has a compelling interest in creating fair and open access to affordable housing and promoting compliance with state and federal civil rights obligations. Therefore, all housing with state subsidy or housing for inclusion on the SHI shall have an Affirmative Fair Housing Marketing Plan. To that end, DHCD has prepared and published comprehensive guidelines that all agencies follow in resident selection for affordable housing units.

In particular, the local preference (if justified) allowable categories are specified:

- **Current Residents.** A household in which one or more members is living in the city or town at the time of application. Documentation of residency should be provided, such as rent receipts, utility bills, street listing, or voter registration listing.
- **Municipal Employees.** Employees of the municipality, such as teachers, janitors, firefighters, police officers, librarians, or Town hall employees.
- **Employees of Local Businesses.** Employees of businesses located in the municipality.
- **Households with Children.** Households with children attending the locality's schools.

The latest revisions to the guidelines were in December 2014. The full guidelines can be found in Section III here: [GUIDELINES \(mass.gov\)](#)

INTERAGENCY BEDROOM MIX POLICY

INTERAGENCY AGREEMENT

Regarding Housing Opportunities for Families with Children

This Interagency Agreement (this "Agreement") is entered into as of the 17th day of January, 2014 by and between the Commonwealth of Massachusetts, acting by and through its Department of Housing and Community Development ("DHCD"), the Massachusetts Housing Partnership Fund Board ("MHP"), the Massachusetts Housing Finance Agency (in its own right and in its capacity as Project Administrator designated by DHCD under the Guidelines for Housing Programs in Which Funding is Provided By Other Than a State Agency, "MassHousing"), the Massachusetts Development Finance Agency ("MassDevelopment") and the Community Economic Development Assistance Corporation ("CEDAC"). DHCD, MHP, MassHousing, MassDevelopment and CEDAC are each referred to herein as a "State Housing Agency" and collectively as the "State Housing Agencies".

Background

A. DHCD's 2013 Analysis of Impediments to Fair Housing Choice ("AI") includes action steps to improve housing opportunities for families, including families with children, the latter being a protected class pursuant to fair housing laws, including the federal Fair Housing Act, as amended (42 U.S.C. §§ 3601 *et seq.*) and Massachusetts General Laws Chapter 151B. In order to respond to development patterns in the Commonwealth that disparately impact and limit housing options for families with children, such steps include requiring a diversity of bedroom sizes in Affordable Production Developments that are not age-restricted and that are funded, assisted or approved by the State Housing Agencies to ensure that families with children are adequately served.

B. The State Housing Agencies have agreed to conduct their activities in accordance with the action steps set forth in the AI.

C. This Agreement sets forth certain agreements and commitments among the State Housing Agencies with respect to this effort.

Definitions

1) "Affordable" - For the purposes of this Agreement, the term "Affordable" shall mean that the development will have units that meet the eligibility requirements for inclusion on the Subsidized Housing Inventory ("SHI").

2) "Production Development" - For purposes of this Agreement "Production Development" is defined as new construction or adaptive reuse of a non-residential building and shall include rehabilitation projects if the property has been vacant for two (2) or more years or if the property has been condemned or made uninhabitable by fire or other casualty.



Agreements

NOW, THEREFORE, DHCD, MHP, MassHousing, MassDevelopment and CEDAC agree as follows:

Bedroom Mix Policy

1) Consistent with the AI, it is the intention of the State Housing Agencies that at least ten percent (10%) of the units in Affordable Production Developments funded, assisted or approved by a State Housing Agency shall have three (3) or more bedrooms except as provided herein. To the extent practicable, the three bedroom or larger units shall be distributed proportionately among affordable and market rate units.

2) The Bedroom Mix Policy shall be applied by the State Housing Agency that imposes the affordability restriction that complies with the requirements of the SHI.

3) The Bedroom Mix Policy shall not apply to Affordable Production Developments for age-restricted housing, assisted living, supportive housing for individuals, single room occupancy or other developments in which the policy is not appropriate for the intended residents. In addition, the Bedroom Mix Policy shall not apply to a Production Development where such units:

- (i) are in a location where there is insufficient market demand for such units , as determined in the reasonable discretion of the applicable State Housing Agency; or
- (ii) will render a development infeasible, as determined in the reasonable discretion of the applicable State Housing Agency.

4) Additionally, a State Housing Agency shall have the discretion to waive this policy (a) for small projects that have less than ten (10) units and (b) in limited instances when, in the applicable State Housing Agency's judgment, specific factors applicable to a project and considered in view of the regional need for family housing, make a waiver reasonable.

5) The Bedroom Mix Policy shall be applicable to all Production Developments provided a Subsidy as defined under 760 CMR 56.02 or otherwise subsidized, financed and/or overseen by a State Housing Agency under the M.G.L. Chapter 40B comprehensive permit rules for which a Chapter 40B Project Eligibility letter is issued on or after March 1, 2014. The policy shall be applicable to all other Affordable Production Developments funded, assisted, or approved by a State Housing Agency on or after May 1, 2014.



COMPREHENSIVE PERMIT DENIAL AND APPEAL PROCEDURES

(a) If a Board considers that, in connection with an Application, a denial of the permit or the imposition of conditions or requirements would be consistent with local needs on the grounds that the Statutory Minima defined at 760 CMR 56.03(3)(b or c) have been satisfied or that one or more of the grounds set forth in 760 CMR 56.03(1) have been met, it must do so according to the following procedures. Within 15 days of the opening of the local hearing for the Comprehensive Permit, the Board shall provide written notice to the Applicant, with a copy to the Department, that it considers that a denial of the permit or the imposition of conditions or requirements would be consistent with local needs, the grounds that it believes have been met, and the factual basis for that position, including any necessary supportive documentation. If the Applicant wishes to challenge the Board's assertion, it must do so by providing written notice to the Department, with a copy to the Board, within 15 days of its receipt of the Board's notice, including any documentation to support its position. The Department shall thereupon review the materials provided by both parties and issue a decision within 30 days of its receipt of all materials. The Board shall have the burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent with local needs, provided, however, that any failure of the Department to issue a timely decision shall be deemed a determination in favor of the municipality. This procedure shall toll the requirement to terminate the hearing within 180 days.

(b) For purposes of this subsection 760 CMR 56.03(8), the total number of SHI Eligible Housing units in a municipality as of the date of a Project's application shall be deemed to include those in any prior Project for which a Comprehensive Permit had been issued by the Board or by the Committee, and which was at the time of the application for the second Project subject to legal appeal by a party other than the Board, subject however to the time limit for counting such units set forth at 760 CMR 56.03(2)(c).

(c) If either the Board or the Applicant wishes to appeal a decision issued by the Department pursuant to 760 CMR 56.03(8)(a), including one resulting from failure of the Department to issue a timely decision, that party shall file an interlocutory appeal with the Committee on an expedited basis, pursuant to 760 CMR 56.05(9)(c) and 56.06(7)(e)(11), within 20 days of its receipt of the decision, with a copy to the other party and to the Department. The Board's hearing of the Project shall thereupon be stayed until the conclusion of the appeal, at which time the Board's hearing shall proceed in accordance with 760 CMR 56.05. Any appeal to the courts of the Committee's ruling shall not be taken until after the Board has completed its hearing and the Committee has rendered a decision on any subsequent appeal.

Source: DHCD Comprehensive Permit Regulations, 760 CMR 56.03(8)

LEAGUE OF WOMEN VOTERS HOUSING SITES

In 2021, the League of Women Voters Housing Issues Committee presented the Town with a list of possible sites for affordable housing in Concord. In response to this presentation, Town Staff vetted the list of potential housing sites. This response is below, and sites further determined to be viable have been added to the Housing Production Plan where relevant and appropriate.

The League of Women Voters initial memo is posted here: [LWV---Potential-affordable-housing-sites-32921 \(concordma.gov\)](#).



TOWN OF CONCORD
Department of Planning & Land Management
141 Keyes Road – Concord MA – 01742

MEMORANDUM

To: Housing Roundtable
From: Marcia Rasmussen, Director Planning & Land Management
Re: **Comments/observations re: 2021 LWV potential affordable housing sites**
Date: November 5, 2021

I understand there is a desire for a response to the 2021 League of Women Voters Housing Issues Committee list of “Possible Sites for Affordable Housing in Concord”, as to why there has been no action or movement toward developing housing at these locations. This list, initially generated in 2018, will be included in the Housing Production Plan, which should be underway in 2022.

The Concord Housing Authority (which is not a Town department, but a separate independent agency governed by the U.S. Department of Housing and Urban Development) is responsible for several parcels that were identified by the LWVCC Housing Issues Committee. The CHA would be better able to provide answers about future actions. I have provided my observations below.

Parcel 1208 and 1213: 399, 401, 405, Bedford Street

These parcels have promise for further review and analysis by the Concord Housing Authority. Additional development would require tie into the Town sewer, which could then allow development over the existing septic system location. Could potentially replace or renovate the existing 8 units. Potential for an additional 4-8 new units.



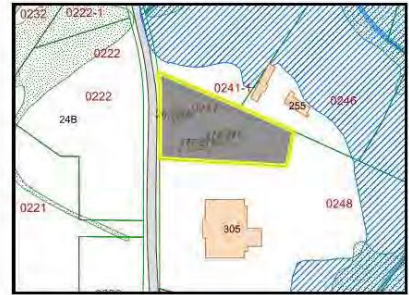
Parcel 1986-6-1: Strawberry Hill Road

There are an existing six units of affordable housing on this site. The Concord Housing Authority might consider the addition of two units in front or back of the existing homes depending on the location of the existing on-site septic system and whether the existing system could accommodate additional bedrooms.



Parcel 0247 – 267-279 Walden Street

There are an existing six units within three buildings at this location. There are concerns about flood plain and wetlands issues and potential turn-around within the site; however, access may be possible from the existing cart path along the north property line. Additionally, this parcel is already on Town sewer, so additional connections may be possible. The CHA may want to consider the possibility of an additional 2-family structure at the rear of this parcel in future planning efforts.



Other CHA properties identified in the LWV list were:

1031 Main Street – an existing single-family home on a 10,122 sq. ft. lot. – very little additional development potential.

156 Peter Spring Road – an existing single-family home on a 20,623 sq. ft. lot - very little additional development potential.

14-16 Bedford Court – an existing two-family house on 4,069 sq. ft. – this lot has already been fully developed.

Town-owned properties identified in the LWV list: All Town-owned properties are under the purview or responsibility of various town departments, including the school district. Any use of town-owned land for housing purposes would require the responsible department or agency to declare the land as excess and then transfer of the land would require vote of Town Meeting.

Parcel 2999 – 1232 Old Marlboro Road

Current site of the Peabody Middle School and actively in use as a school for another 3-5 years. Unknown whether there are other town uses that may take precedence for the use of this site as affordable housing. Existing bedrock on site required construction of an off-site septic system located on Parcel 2997-1 on Powder Mill Road. The location is remote from village centers.



Parcel 3977 – 735 Main Street

The building and land are co-owned by the Town of Concord and the Concord Municipal Light Plant and is currently in use by CMLP. The Town’s Facilities Department is also using the building for storage of supplies and equipment. Other town uses for the property are in discussion. The site is located on Town sewer and excess land, if any, could provide an affordable housing location. Further discussion regarding municipal need for the land is necessary.



Parcel 4187 – 120 Meriam Road

Parcel 4187 is the site of the Ripley building, which is the current location of the administrative offices for the Concord Public Schools and the Concord-Carlisle Regional School District. The parcel is 17.76 acres and includes parking facilities and playing fields.



Parcel 4209, located north of the Ripley building site, includes 11.83 acres of land that is currently in farming and community garden use. This parcel, also known as the Ammendolia land, has high ground water and challenging access (there is a narrow parcel of land to Ash St./Ridgeway Rd. and potential wetlands crossing). There was significant opposition to a proposal to install solar panels at this location in the past.

Parcel 4185-2, containing 12.72 acres and located south of the Ripley building site, was acquired for future school use with proceeds from the sale of other School land on Strawberry Hill Road was sold for housing purposes. This parcel, also known as the Burke land, also has high ground water issues. It is currently in farming use. At the time the farm field was acquired, the house associated with the land was purchased by the Concord Housing Trust and three units of housing was constructed on the excess land when Town sewer was extended on Old Bedford Road.

The following parcels are owned by the Commonwealth of Massachusetts: These properties must go through a rigorous process to be declared surplus then offered to all other agencies of the Commonwealth before they can be made available for housing purposes. In some cases, the land would have to be purchased at full market value, depending on how it was initially acquired.

Parcel 3821 – 91B Main Street

This parcel, containing 1.45 acres, is located adjacent to the house being renovated as a two-family by Habitat for Humanity. The Town has been in contact with the State regarding declaring the property as surplus and have been told that an appraisal must be conducted prior to sale. Due to the initial acquisition process, full market value is requested.



Parcel 3668-1 – 1733 Concord Turnpike

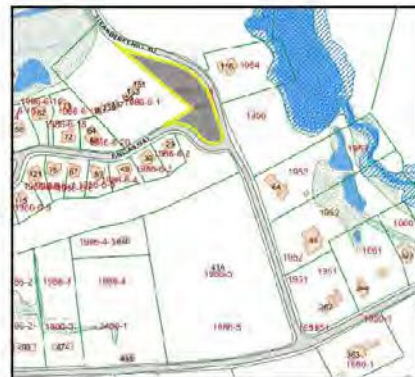
This parcel, containing 1.32 acres, is located southeast of the afore-noted parcel at 91B Main Street. It is a U-shaped parcel and has access from Emerson Road and provides access to the adjacent parcel owned by Concord Oil. Concord Oil continues its use of the site. There would need to be a 21E review to determine whether there has been any contamination at this location.



Other parcels identified in the LWV list, but noted as unlikely due to community opposition, included:

Parcel 1986-6-19 – 13A Strawberry Hill Road

This 1.12 acres parcel, located between a Concord Housing Authority site and Strawberry Hill Road, is a narrow, steeply sloped site, and is an unlikely housing location.



Parcel 1986-5 – 41A Barrett’s Mill Road

This 7.47 acre parcel, under the purview of the Concord Public Schools, is located at the intersection of Barrett’s Mill Road and Strawberry Hill Road (also shown in the map to the right). The parcel is immediately adjacent to the historic Colonel Barrett House, which was the destination of the British regulars on April 19, 1775. The land has been continuously farmed since that time and has been added to the defined area of the Minute Man National Park. Due to its historic character, the land is an unlikely prospect for an affordable housing location.



Parcel 3000 – 78 Old Pickard Road

This 9.96 acre parcel is under the purview of the Concord Public Schools and is the current site of the Cushing playing field. There is also ledge at this location, which makes installation of an on-site septic system challenging.

LEAGUE OF WOMEN VOTERS CREATIVE THINKING IDEAS

The League of Women Voters provided some ideas to consider in this Housing Production Plan, titled Creative Thinking.

Creative Thinking

The HPP should include suggestions to spark discussions on solutions. We offer the following to be included in the HPP in a new section: "Creative Thinking."

1. Research what nearby communities are doing to promote the development of affordable housing units.
2. Encourage the purchase by the town of "McMansions" that are for sale, with the intent of converting them into multiple dwelling units.
3. Encourage the town to facilitate the matching of parties who are interested in making space available in their individual homes with parties seeking for such a space by creating and maintaining a list of interested parties.
 - a. People could be encouraged to contact the appropriate town organization to place their names on a list, which would be made available on a restricted basis. The Council on Aging is one possible organization.
4. Encourage mixed rental apartment complexes to provide SHH affordable units and moderate market rate units.
5. Develop strategies for attracting "friendly" 40B developers – ones who take account of the town's interests.
6. Encourage owners of large houses to consider converting them into duplexes or even triplexes by addressing the issue in local media, such as "The Concord Bridge."
7. Provide financial assistance for the conversion of homes to create more housing units, possibly by a property tax abatement for affordable units.
8. Indicate to businesses the advantages of providing housing subsidies to their employees so they can live close to their work, one of which is a substantial decrease in turnover rate.
9. Encourage individuals or organizations to think creatively about possible solutions for our affordable housing problems.
 - a. Perhaps put a face on housing issues by describing the sort of person who works in Concord but cannot afford to live here (maybe as an article in "The Concord Bridge.")
10. Consider co-housing, boarding houses, tiny houses, or multi-generational housing solutions.
11. Consider residences on top of town buildings, perhaps on the model of the new Boston Public Library building.
12. Use local media to survey the town for opinions on these ideas and to solicit more ideas.

Thank you for your consideration.

Respectfully submitted,

/s/ _____
Ingrid Detweiler, Committee Chair

/s/ _____
Jonathan Aibel, Committee Member

LWVCC Housing Issues Committee
PO Box 34
Concord, MA 01742

Enc.: Appendix

PUBLIC CEREMONIES AND CELEBRATIONS COMMITTEE CHARGE

1. Membership

The Public Ceremonies and Celebrations Committee shall have eight regular voting seven members appointed by the Select Board of Selectmen for staggered five-year terms as determined by the Select Board upon appointment . Unless such requirement is waived by the Select Board .-(To be approved at the time of appointment, at least two members of the Committee at any given time shall be veterans of US military service. 1983 Town Meeting.)

The membership of the Public Ceremonies and Celebrations Committee may will be increased with up to five (5) non-voting associate members to help with the expected additional work of preparing for the year 2000.

The associate members appointed by the Select Board at the request of the Committee for the purpose of assisting the Committee in the planning and implementation of such special events for which they may have been appointed. Associate Members Selectmen may be either former Committee members or residents at large, and, unless otherwise specified in connection with:

The associate members' duties will be to assist the Committee in planning and implementing the ceremonies and celebrations occurring in the Year 2000.

Associate members will serve from their appointment, their term shall expire sixty (60) days following the conclusion of the event or completion of the duties for which they have been appointed., until May 31, 2000.

2. Duties and Responsibilities

- a. Annual Events: Subject to the direction and :have complete charge, with the approval of the Select Board, to organize and direct the -of Selectmen, of public ceremonies held in the Town or in which the Town participates including those in observance of Concord's Honored Citizen Day, Meriam's Corner Exercises, Patriots' Day, Dawn Salute, Memorial Day, and Veteran's Day. -Anything pertaining to these above mentioned events may be brought directly to the Committee or a member of the Parade in connection with the December Tree Lighting Ceremony. committee.
- b. Special Events: with reference to other Town-sponsored ceremonies and celebrations of major importance as designated by the Select Board, -of Selectmen, the Board Selectmen, after consulting with the Committee PCCC, shall determine the need for appointing an ad hoc committee to plan and direct the particular event and determine the composition of such committee; and where appropriate, one or more members of the Committee shall be chosen to serve on the ad hoc committee. If

~~action of the Town Meeting is deemed necessary, the conduct of such special events shall be in accordance with the Town Meeting Vote. -If such a need for a special event ad hoc committee is determined, the Board of Selectmen shall, under Article 39, Section 3 of the March 3, 1952 Town Meeting, take such a recommendation to Town Meeting. If such a committee is appointed, the PCCC shall be represented on the special committee and any executive committee thereof. The PCCC representatives will be elected by majority vote of the PCCC.~~

- c. Other Events: All groups, organizations or individuals seeking to hold celebrations involving Town property shall seek approval of the Board of Selectmen through the Town Manager's office. Whenever approval is granted, communication of the plans for each celebration shall be forwarded in writing to the Committee; PCCC; in addition, a spokesperson for the sponsoring group will be welcomed at a Committee PCCC meeting if scheduled in advance with the Chairehairman. Such communications are for informational purposes only unless some other course of action is requested by the Select Board; -of Selectmen.

- d. The Committee shall Be responsible for coordination, through the office of the Town Manager, with the Police and Fire Departments and other appropriate departments and agencies of the Town in the preparation and carrying out of annual or public celebrations and ceremonies, including cooperation with the Police Department in preparing and updating a police procedural manual for annual public events. Similar coordination when required with other towns will be made directly by the CommitteePCCC.
- e. The Committee shall Encourage and promote the active participation of civic, religious, and military organizations and interested citizens in public events.
- £ The Committee shall £—Arrange for appropriate publicity for all events in the Town for which the committee has responsibility.
- g. The Committee shall Be familiar with and take advantage of any private or public donations available for the Town's public ceremonies and celebrations.
- h. The Committee shall Develop the annual budget and submit it to the Town Manager.
- i. The Committee shall Review all warrants for payment before referral to the Assistant Town Manager.

3-Other Considerations

The Public Ceremonies and Celebrations Committee is responsible for conducting its activities in a manner which is in compliance with the provisions of all relevant State and local laws, and regulations, including but not limited to, the Open Meeting Law, the Public Records Law, the-and Conflict -of -Interest Law and

all other laws and regulations of the Commonwealth, as well as all relevant Bylaws and Administrative Policies of the Town.

HJD 12/14/22-

PUBLIC CEREMONIES AND CELEBRATIONS COMMITTEE CHARGE

1. Membership

The Public Ceremonies and Celebrations Committee shall have eight regular voting members appointed by the Select Board for staggered five-year terms as determined by the Select Board upon appointment. Unless such requirement is waived by the Select Board at the time of appointment, at least two members of the Committee at any given time shall be veterans of US military service.

The membership of the Committee may be increased with up to five (5) non-voting Associate Members appointed by the Select Board at the request of the Committee for the purpose of assisting the Committee in the planning and implementation of such special events for which they may have been appointed. Associate Members may be either former Committee members or residents at large, and, unless otherwise specified in connection with their appointment, their term shall expire sixty (60) days following the conclusion of the event or completion of the duties for which they have been appointed..

2. Duties and Responsibilities

- a. Annual Events: Subject to the direction and approval of the Select Board, to organize and direct the public ceremonies held in the Town or in which the Town participates including those in observance of Concord's Honored Citizen Day, Meriam's Corner Exercises, Patriots' Day, Dawn Salute, Memorial Day, and Veteran's Day, the Parade in connection with the December Tree Lighting Ceremony.
- b. Special Events: with reference to other Town-sponsored ceremonies and celebrations of major importance as designated by the Select Board, the Board, after consulting with the Committee, shall determine the need for appointing an *ad hoc* committee to plan and direct the particular event and determine the composition of such committee; and where appropriate, one or more members of the Committee shall be chosen to serve on the *ad hoc* committee. If action of the Town Meeting is deemed necessary, the conduct of such special events shall be in accordance with the Town Meeting Vote.
- c. Other Events: All groups, organizations or individuals seeking to hold celebrations involving Town property shall seek approval of the Board of Selectmen through the Town Manager's office. Whenever approval is granted, communication of the plans for each celebration shall be forwarded in writing to the Committee; in addition, a spokesperson for the sponsoring group will be welcomed at a Committee meeting if scheduled in advance with the Chair. Such communications are for informational purposes only unless some other course of action is requested by the Select Board..

Approved by Board of Selectmen November 8, 1982

Amended July 19, 1999

Amended December _____, 2022

- d. The Committee shall be responsible for coordination, through the office of the Town Manager, with the Police and Fire Departments and other appropriate departments and agencies of the Town in the preparation and carrying out of annual or public celebrations and ceremonies, including cooperation with the Police Department in preparing and updating a police procedural manual for annual public events. Similar coordination when required with other towns will be made directly by the Committee.
- e. The Committee shall encourage and promote the active participation of civic, religious, and military organizations and interested citizens in public events.
- f. The Committee shall arrange for appropriate publicity for all events in the Town for which the Committee has responsibility.
- g. The Committee shall be familiar with and take advantage of any private or public donations available for the Town's public ceremonies and celebrations.
- h. The Committee shall develop the annual budget and submit it to the Town Manager.
- i. The Committee shall review all warrants for payment before referral to the Assistant Town Manager.

3. Other Considerations

The Public Ceremonies and Celebrations Committee is responsible for conducting its activities in a manner which is in compliance with the provisions of the Open Meeting Law, the Public Records Law, the Conflict-of-Interest Law and all other laws and regulations of the Commonwealth, as well as all relevant Bylaws and Administrative Policies of the Town.

HJD 12/14/22



FY24 Town Budget

Select Board

December 19, 2022



FY24 Town Budget

Strategic Challenges

Great Place to Work

Independent classification & compensation review (funding for results needed)

Governance

Evaluate long-term viability of remote/hybrid meetings (funding for support staff needed)

Infrastructure

Capital Improvement Plan & Debt Schedule (increased funding needed)

Welcoming Community

Affordable Housing –funding while awaiting local options for revenue stream

Transportation improvements – funding needed (some ARPA*)

Mental Health – staffing & support services needed

**see ARPA worksheet that follows*



FY24 Town Budget Management Response

- Salary Reserve has uncommitted funding for class & comp study results
- Explore Regionalization opportunities with neighboring communities
- Use ARPA funding selectively for staffing (Economic Vitality Manager in FY23/temp GIS help in FY24)
- Add Assistant Fire Chief to evaluate and prepare for change to offer Advanced Life Support
- Add Mental Health position in the Police department
- Add funds for part-time/regional Public Health Nurse
- Add funds to add clerical support for high-traffic areas (Building Inspections, PLM)
- Increase hours for selective part-time staff
- Increased commitment to capital with further increases planned in FY25



FY24 Town Budget Management Response

Improve communication throughout the organization, promote teamwork & financial efficiency

Centralize Technology costs in the Technology budget (~\$300k)

- Introduce an organization-wide strategic discussion of technology
- Control expenses and streamline/integrate systems
- Improve long term forecasting & budgeting

Centralize Facilities costs in the Facilities budget (~\$800k)

- Two-step process: FY24 move expenses; FY25 move staffing
- Control expenses and streamline/integrate budling systems
- Improve long term forecasting & budgeting (especially for capital)



FY24 Budget

Town Manager's Office & Legal Services

	FY24 Department Budget Requests	Total	adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
1a	Town Manager	\$ 830,441	\$ (98,891)	\$ 731,550			\$ (1,200)	\$ 730,350	
1b	Human Resources	\$ 655,681	\$ (39,000)	\$ 616,681			\$ (41,300)	\$ 575,381	
1c	Information Systems	\$ 1,464,127		\$ 1,464,127			\$ 293,539	\$ 1,757,666	
1d	Town Meetings & Reports	\$ 95,400		\$ 95,400				\$ 95,400	
1e	Facilities Administration	\$ 1,222,340	\$ (85,000)	\$ 1,137,340		\$ 792,748		\$ 1,930,088	
1f	Parks & Playground	\$ 208,367		\$ 208,367		\$ 8,360		\$ 216,727	
1g	Resource Sustainability	\$ 179,140	\$ (69,140)	\$ 110,000				\$ 110,000	
1h	Visitor's Center	\$ 36,121	\$ 4,691,617	\$ 36,121	\$ 4,399,586	\$ (36,121)		\$ -	\$ 5,415,612
2	Legal Services	\$ 465,000	\$ 465,000	\$ (15,000)	\$ 450,000	\$ 450,000		\$ 450,000	\$ 450,000



FY24 Budget

Finance Department

	FY24 Department Budget Requests	Total		adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
3a	Finance Administration	\$ 647,927			\$ 647,927				\$ 647,927	
3b	Treasurer-Collector	\$ 466,957			\$ 466,957				\$ 466,957	
3c	Town Accountant	\$ 369,294			\$ 369,294			\$ (1,700)	\$ 367,594	
3d	Assessor	\$ 459,957			\$ 459,957			\$ (25,000)	\$ 434,957	
3e	Town Clerk	\$ 469,912			\$ 469,912			\$ (5,413)	\$ 464,499	
3f	Elections	\$ 84,264			\$ 84,264			\$ (3,550)	\$ 80,714	
3g	Registrars	\$ 11,165	\$ 2,509,476		\$ 11,165	\$ 2,509,476			\$ 11,165	\$ 2,473,813



FY24 Budget

Planning & Land Management

	FY24 Department Budget Requests	Total	adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
4a	Planning	\$ 661,933	\$ -	\$ 661,933				\$ 661,933	
4b	Natural Resources	\$ 449,610		\$ 449,610				\$ 449,610	
4c	Inspections	\$ 593,097		\$ 593,097				\$ 593,097	
4d	Health	\$ 601,041	\$ (64,497)	\$ 536,544			\$ (4,500)	\$ 532,044	
4e	Economic Vitality & Tourism	\$ 287,221	\$ (40,000)	\$ 247,221			\$ (11,500)	\$ 235,721	
4f	141 Keyes Road	\$ 33,325	\$ 2,626,227	\$ 33,325	\$ 2,521,730	\$ (29,725)		\$ 3,600	\$ 2,476,005



FY24 Budget

Human Services

FY24 Department Budget Requests	Total		adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
Library	\$ 2,912,220		\$ (64,916)	\$ 2,847,304		\$ (356,466)		\$ 2,490,838	
Senior Services Administration	\$ 670,579		\$ (21,203)	\$ 649,376			\$ (1,800)	\$ 647,576	
HWCC	\$ 110,332			\$ 110,332		\$ (44,990)		\$ 65,342	
Recreation Administration	\$ 120,303		\$ (120,303)	\$ -				\$ -	
Hunt Gymnasium	\$ 109,958		\$ (109,958)	\$ -				\$ -	
Human Services	\$ 96,350			\$ 96,350				\$ 96,350	
Veterans Services	\$ 86,647			\$ 86,647				\$ 86,647	
Ceremonies & Celebrations	\$ 30,600	\$ 4,136,989	\$ 30,000	\$ 60,600	\$ 3,850,609			\$ 60,600	\$ 3,447,353



FY24 Budget

Public Safety

	FY24 Department Budget Requests	Total		adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
6a	Police Department	\$ 5,491,059		\$ (254,536)	\$ 5,236,523			\$ (20,360)	\$ 5,216,163	
6b	Animal Control	\$ 29,260			\$ 29,260				\$ 29,260	
6c	Public Safety Building	\$ 313,559		\$ (5,000)	\$ 308,559		\$ (160,141)	\$ (95,500)	\$ 52,918	
6d	Fire Department	\$ 6,634,351		\$ (14,500)	\$ 6,619,851		\$ (2,896)	\$ (5,944)	\$ 6,611,011	
6e	Emergency Management Services	\$ 18,000			\$ 18,000		\$ (3,450)		\$ 14,550	
6f	West Concord Fire Station	\$ 26,585	\$ 12,512,814		\$ 26,585	\$ 12,238,778	\$ (25,022)		\$ 1,563	\$ 11,925,465



FY24 Budget

Public Works

	FY24 Department Budget Requests	Total	adjustments:	Revised Total	Transfers - Facilities	Transfers - Technology	Final Total	
7a	Public Works Administration	\$ 422,120		\$ 422,120			\$ 422,120	
7b	Engineering	\$ 777,496		\$ 777,496		\$ (75,772)	\$ 701,724	
7c	Highway Maintenance	\$ 1,805,133		\$ 1,805,133			\$ 1,805,133	
7d	Winter Maintenance	\$ 881,250	\$ (206,250)	\$ 675,000			\$ 675,000	
7e	Parks and Tree	\$ 992,220		\$ 992,220			\$ 992,220	
7f	Cemetery	\$ 399,673	\$ (125,883)	\$ 273,790			\$ 273,790	
7g	133/ 135 Keyes Road	\$ 210,385		\$ 210,385	\$ (142,297)		\$ 68,088	
7h	Street Lighting	\$ 40,310	\$ 5,528,587	\$ 40,310	\$ 5,196,454		\$ 40,310	\$ 4,978,385



FY24 Budget Other & Totals

FY24 Department Budget Requests	Total		adjustments:	Revised Total		Transfers - Facilities	Transfers - Technology	Final Total	
Employee Wellness & Training Programs	\$ 75,000		\$ -	\$ 75,000				\$ 75,000	
Reserve Fund	\$ 225,000		\$ (25,000)	\$ 200,000				\$ 200,000	
Salary Reserve	\$ 755,000	\$ (600,000)		\$ 155,000				\$ 155,000	
Land Fund	\$ 25,000	\$ 1,080,000	\$ (25,000)	\$ -	\$ 430,000			\$ -	\$ 430,000
Tier 1 Capital	\$ 2,000,000	\$ 2,000,000	\$ (275,000)	\$ 1,725,000	\$ 1,725,000			\$ 1,725,000	\$ 1,725,000
totals:	\$ 35,550,710		\$ (1,629,077)	\$ 33,321,633	\$ 33,321,633	\$ -	\$ -	\$ 33,321,633	\$ 33,321,633

**see memo that follows*



FY24 Budget

Capital & Debt*

Management response: Phase increase in capital to \$2 million over a two-year period

FY24 Capital: \$1.725 million (up from \$1.509 million in FY23)

- \$ 35,000 Town Manager's Office for non-building energy improvements
- \$355,000 Facilities for various building repairs
- \$135,000 Technology for \$120k equipment replacement plus \$15k Library
- \$ 55,000 PLM for a compact tractor (\$25k) and small projects (\$30k)
- \$350,000 Public Safety for vehicles & equipment (Fire \$155k; Police (\$195k)
- \$795,000 Public Works for equipment & expenses (Engin'ng \$285k; Parks/Trees \$60k; Highway \$450k)

**see memo & Capital Plan that follows for FY24-FY33*



FY24 Budget

Capital & Debt

Management response: Reduce reliance on debt strategically over time, fund only large projects

FY24 New Debt: \$5.0 million (down from \$5.4 million in FY23)

- \$900,000 School department for miscellaneous capital projects
- \$210,000 Public Safety for vehicle refurbishment to lengthen lifespan
- \$515,000 PW Traffic Signals & Signage (Baker/Main intersection)
- \$425,000 PW Parking lot rehabilitation (TBD from Walden St, Turtle Trail, Conant St (Rideout), the Railway Commuter Lot in West Concord, and the Church St lot)
- \$300,000 PW vehicle (replace H34 2008 35,000 GVWR Swap/Plow)
- \$2.65 mil Public Works for road improvements

FY24 Target:	\$ 1,320,000
--------------	--------------

Amount	Description	Justification	ARPA Spending Category	Town Priorities
\$ 500,000	Middle School Solar	Funding to supplement CMLP \$5.5M expenditure for the approximate 1.5MW rooftop solar array and canopy to be sited at the Concord Middle School. While not the highest priority project for CMLP, it is being advanced now due to timing and community interest. Municipalities can't take advantage of federal incentives.	Infrastructure	Middle School
\$ 150,000	Level 3 Charging, Public Safety	Installation is needed to make efficient use of the department's electric fleet. In accordance with the Fleet Electrification Study.	Lost Revenue	Sustainability
\$ 150,000	Facilities Study	Town appropriated \$150,000 in 2014 for a CPW Feasibility Study, and is now positioning itself to move forward. On a parallel path, the Town would also like to explore options for Public Safety. Project funding will be combined to explore all options relative to both facilities.	Infrastructure	Capital
\$ 130,000	Park Improvements	Emerson Basketball & tennis court rehabilitation; Rideout Baseball & tennis court rehabilitation. Projects eliminated from CIP due to lack of resources.	Infrastructure	Capital
\$ 100,000	Stormwater Management Fund	Evaluate feasibility of creation of fund. Revenue to fund future stormwater infrastructure maintenance and improvements.	Infrastructure	Sustainability; Capital
\$ 100,000	Municipal Buildings Energy Audit	Working with a vendor, explore options for energy efficiency and implement recommendations. This funding to be combined with the remaining Sawyer Trust Funds (approximately \$75,000)	Lost Revenue	Sustainability
\$ 75,000	DEI Initiatives	Advancing DEI initiatives, work to be coordinated by the Town Manager's Office.	Lost Revenue	SB: C1-3; TM 2
\$ 50,000	Water Due Diligence	Town is investigating the feasibility of joining MWRA, the cost of which would be borne by the Water Enterprise Fund. Approximately 95% of residents are served by municipal water, but 5% are not for a variety of reasons. Funds would be used to determine the feasibility of providing municipal water to remaining residents.	Infrastructure	Sustainability; Capital
\$ 40,000	GIS	Additional data gathering and development.	Infrastructure	Sustainability; Capital: Economic Vitality
\$ 25,000	Municipal, Strategic Planning	Demand for increase in municipal services is tremendous. The organization has grown fast; segments are disconnected and sometimes siloed. Continued review of organization structure to better position for success. Collaboration building and development of common/shared goals.	Lost Revenue	SB: A; TM 1
\$ 1,320,000	Total			

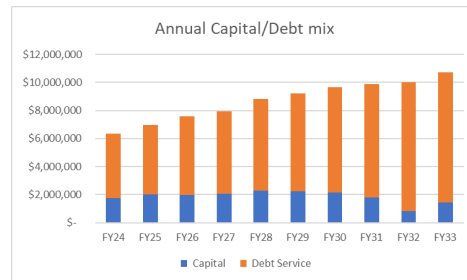
FY	Amount	Description	Committed
23	\$ 500,000.00	Affordable Housing: annual request from CMAHT; appropriated from Free Cash to be backfilled with ARPA	yes
\$ 500,000.00		FY23 Committed Total	
23	\$ 200,000.00	Transportation Initiatives: transportation study; improvements; grant matching funds; transportation planner (PT to FT). Will seek input from TAC before a formal proposal is brought forward. Fund now to leverage grant funds currently available.	no
23	\$ 125,000.00	Economic Development Initiatives: consultant or staff position. Will seek input from EVC, CBP, Chamber of Commerce before a formal proposal is brought forward. Fund now to leverage grant funds currently available. Affordable Housing: in Spring 2023, based upon 2020 Census, Town is projected to be 8 - 20 units of affordable housing short of 10%, leaving it open to 40B development applications. Town needs to develop an inventory of all potential units to be added to SHI and develop a strategic plan to identify up to 20 units. This scope of work does not fall under current contract with RHSO. Will seek input from CMAHT, CHDC, RHSO &	no
23	\$ 30,000.00	Cell Service: (up to) in the event that service study needs to be updated; fund any due diligence expenses related to specific sites. This is a high priority for the	no
23	\$ 25,000.00	business community.	no
23	\$ 20,000.00	Cultural Arts: Town spends less in this area than neighbors and other peers; art relieves stress, fosters community; multi-generational linkages. Will seek input from various groups before bringing a proposal forward.	no
\$ 900,000.00		FY23 Committed & Proposed Total	

ARTICLE xxx: Capital Improvement & Debt Plan To determine whether the Town will vote to raise and appropriate, or transfer from available funds, or authorize the Town Treasurer with the approval of the Select Board to borrow by the issuance of bonds or notes under the provisions of Massachusetts General Laws c. 44, § 7, the sums of money specified in the FY24 Capital Improvement Plan, or any other sum, to be expended under the direction of the Town Manager, and further that any premium received by the Town upon the sale of any bonds or notes approved by the vote, less any such premium applied to the payment of the costs of issuance of such bonds or notes, may be applied to the payment of costs approved by this vote in accordance with Massachusetts General Laws c. 44, § 20, thereby reducing the amount authorized to be borrowed to pay such costs by a like amount, or take any other action relative thereto.

BACKGROUND: The Town has engaged in a thorough ten-year Capital Improvement Plan process during the fall 2022, and as a result submits this summary, shown as Table 1:

Table 1.

Description	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
(A) General Fund Capital (Tier I)	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500
(B) Gen Fund Debt Service (Tier II)	\$ 4,527,700	\$ 4,793,300	\$ 5,322,850	\$ 5,600,290	\$ 6,161,100	\$ 6,687,500	\$ 7,340,750	\$ 8,091,750	\$ 8,641,250	\$ 8,860,000
(C) Excluded Debt (Tier III)	no new debt planned in FY24									



This submittal conforms to the FinCom Policy of a minimum of 5% committed to capital & debt service inside the levy, when compared to certain expected revenues. It should be noted that the need for capital financed by debt service is expected to grow beyond the 5% level in upcoming years.

	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
Capital(A) & Debt(B) Spending	\$ 6,252,700	\$ 6,793,300	\$ 7,607,350	\$ 7,973,790	\$ 8,453,600	\$ 8,916,500	\$ 9,483,250	\$ 9,899,250	\$ 9,478,750	\$ 10,287,500
FinCom Policy 5% to 7% range	4.86%	5.10%	5.52%	5.59%	5.73%	5.84%	6.00%	6.05%	5.60%	5.87%

Capital ('pay-go')

Details by Town and School departments are as follows for the so-called 'pay-go' (or cash) portion of the Capital Plan, referenced above as (A) and summarized below in Table 2:

Table 2.

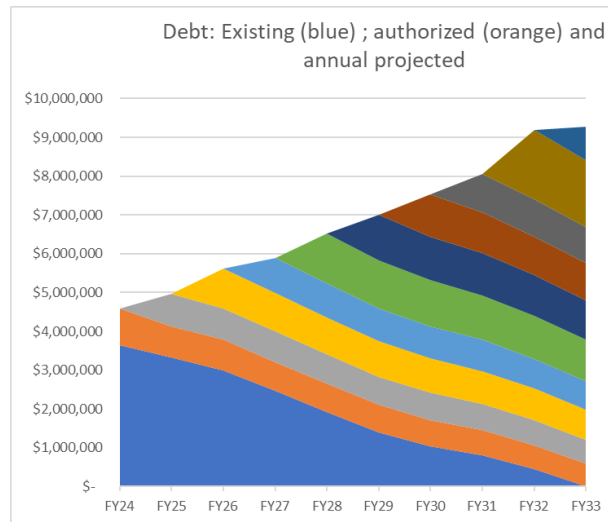
(A) General Fund Capital (Tier I)	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
Department										
Schools	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Town Manager's Office	\$ 35,000	\$ 100,000	\$ 175,000	\$ 100,000	\$ -	\$ -	\$ 300,000	\$ -	\$ -	\$ -
Facilities	\$ 355,000	\$ 230,000	\$ 340,000	\$ 140,000	\$ 585,000	\$ 160,000	\$ -	\$ 600,000	\$ -	\$ 440,000
Finance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology	\$ 120,000	\$ 260,000	\$ 510,000	\$ 520,000	\$ 155,000	\$ 120,000	\$ 300,000	\$ 100,000	\$ 130,000	\$ 180,000
Public Library	\$ 15,000	\$ 60,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 17,500	\$ 17,500	\$ 17,500	\$ 17,500	\$ 20,000
Planning & Land Management	\$ 55,000	\$ 50,000	\$ 50,000	\$ 20,000	\$ 20,000	\$ 325,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 30,000
Public Safety - Fire	\$ 155,000	\$ 320,000	\$ 324,500	\$ 676,000	\$ 462,500	\$ 364,000	\$ 312,500	\$ 80,000	\$ 92,500	\$ 75,000
Public Safety - Police	\$ 195,000	\$ 345,000	\$ 232,500	\$ 260,000	\$ 210,000	\$ 367,500	\$ 325,000	\$ 322,500	\$ 227,500	\$ 337,500
Public Works - engineering/roads	\$ 285,000	\$ 240,000	\$ 247,500	\$ 247,500	\$ 255,000	\$ 255,000	\$ 262,500	\$ 262,500	\$ 270,000	\$ 270,000
Public Works - parks	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
Public Works - equipment	\$ 450,000	\$ 335,000	\$ 330,000	\$ 335,000	\$ 530,000	\$ 555,000	\$ 535,000	\$ 335,000	\$ 10,000	\$ 10,000
GRAND TOTAL GF Capital/Tier I	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500

Debt Service (inside the tax levy)

Details of current plus expected debt service are as follows for the debt-financed portion of the Capital Plan, referenced above as (B) and summarized below in Table 3:

Table 3.

	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
Existing debt service	\$ 3,642,700	\$ 3,318,300	\$ 2,997,850	\$ 2,455,290	\$ 1,926,100	\$ 1,402,500	\$ 1,045,750	\$ 808,750	\$ 446,250	\$ -
Estimated DS for authorized but not issued	\$ 885,000	\$ 725,000	\$ 700,000	\$ 675,000	\$ 650,000	\$ 625,000	\$ 600,000	\$ 575,000	\$ 550,000	\$ 525,000
Estimated DS for future debt	\$ -	\$ 750,000	\$ 1,625,000	\$ 2,470,000	\$ 3,585,000	\$ 4,660,000	\$ 5,695,000	\$ 6,708,000	\$ 7,645,000	\$ 8,335,000
(B) General Fund Debt Service	\$ 4,527,700	\$ 4,793,300	\$ 5,322,850	\$ 5,600,290	\$ 6,161,100	\$ 6,687,500	\$ 7,340,750	\$ 8,091,750	\$ 8,641,250	\$ 8,860,000



New Debt

Details by Town and School departments are as follows for the new debt (Tier II, inside tax levy) portion of the Capital Plan are shown in Table 4 below. In the previous chart, these are represented by everything to the left of blue (existing) and orange (authorized by Town Meeting but not yet issued). The FY24 column is what is anticipated to be requested at the 2023 Annual Town Meeting:

Table 4.

(B) Gen Fund Debt Service (Tier II)										
Department	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
Schools	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000	\$ 900,000
Town Manager's Office	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Facilities	\$ -	\$ -	\$ 750,000	\$ 1,000,000	\$ 2,100,000	\$ 1,000,000	\$ 1,750,000	\$ -	\$ -	\$ -
Finance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Technology	\$ -	\$ 250,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Library	\$ -	\$ 500,000	\$ -	\$ 600,000	\$ -	\$ 700,000	\$ -	\$ 800,000	\$ -	\$ 900,000
Planning & Land Management	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Safety - Fire	\$ 210,000	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ 1,600,000	\$ 850,000	\$ -
Public Safety - Police	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Works - engineering/roads	\$ 3,590,000	\$ 4,040,000	\$ 3,850,000	\$ 4,750,000	\$ 5,000,000	\$ 5,400,000	\$ 5,350,000	\$ 4,700,000	\$ 4,750,000	\$ 4,700,000
Public Works - parks	\$ -	\$ -	\$ -	\$ 750,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Public Works - equipment	\$ 300,000	\$ 310,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
GRAND TOTAL GF Capital/Tier I	\$ 5,000,000	\$ 6,000,000	\$ 6,000,000	\$ 8,000,000	\$ 8,000,000	\$ 8,000,000	\$ 8,000,000	\$ 8,000,000	\$ 6,500,000	\$ 6,500,000

Summary

A Capital Improvement Program (often called a Capital Plan) is a long-range planning tool where the capital needs of a community, as identified through extensive public dialogue and Town and School staff work, meet up with thoughtful financial planning. Debt financing for portions of the capital help spread out the costs over the useful life of a project or equipment as may be desired (or affordable).

Concord has a significant backlog of unmet capital needs, although some of that has only emerged from the internal process used recently. This is coupled with the challenges brought about by inflation and the supply chain dislocations. Finally, an important but sometimes overlooked aspect of good capital planning is the bandwidth of staff to undertake various projects. Capital equipment purchases are the easiest to implement from that perspective.

In addition to the suggested Capital & Debt outlined above, the following represent some planned (FY24) or possible (FY25+) sources of funding to assist with some of this demand for capital:

Table 5.

	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
(A) Tier I - General Fund Capital	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500
From ARPA for capital	\$ 1,130,000	\$ 200,000								
From Previous Technology Funding	\$ 150,000	\$ 100,000								
From Cemetery Fund	\$ 40,000	\$ 40,000	\$ 40,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 55,000
From New Enterprise Fund (Storm Water)	\$ -	\$ -	\$ 1,425,000	\$ 1,250,000	\$ 1,550,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000
From Revolving Funds	\$ 95,000	\$ 150,000								
Additional Capital (not in GF)	\$ 1,415,000	\$ 490,000	\$ 1,465,000	\$ 1,295,000	\$ 1,595,000	\$ 1,295,000	\$ 1,300,000	\$ 1,300,000	\$ 1,300,000	\$ 1,305,000
GROSS CAPITAL PLAN	\$ 3,140,000	\$ 2,490,000	\$ 3,749,500	\$ 3,668,500	\$ 3,887,500	\$ 3,524,000	\$ 3,442,500	\$ 3,107,500	\$ 2,137,500	\$ 2,732,500

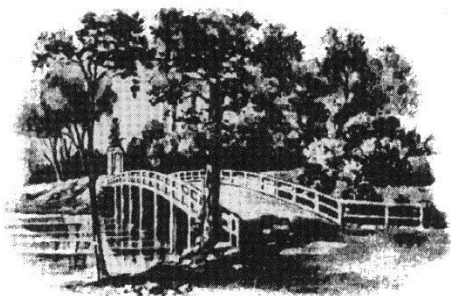
The one-time ARPA funds provide an excellent opportunity to move some projects forward, from that list of \$1.13 million of capital in FY24, all under the direction of the Town Manager’s Office. Some of these projects would have been more difficult to immediately fund, and some may relieve the pressure from the Capital Plan in the future:

- \$500,000 for Middle School solar.
- \$150,000 for Public Safety fast-charging station for electric vehicles.
- \$100,000 for Town Buildings energy audit. This project will outline improvements that could be made to each building, and discuss the cost versus the expected energy savings, meant for future public discussion.
- \$100,000 to explore a Storm Water Enterprise Fund. Several communities have created such funding vehicles, designed to protect storm water assets and follow federal NPDES requirements that are difficult to implement inside the tax levy. Note the line above starting in FY26 outlines the funding needed in this area. An extensive public dialogue would follow this study.
- \$130,000 for capital improvements to Emerson and Rideout (basketball courts and tennis courts for each).
- \$150,000 to explore the Public Safety facility. Previous funds to explore the Public Works facility have been retained and may be combined for one larger project.

Ten-Year Total	Description	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
\$ 19,119,500	(A) General Fund Capital (Tier I)	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500
\$ 66,026,490	(B) Gen Fund Debt Service (Tier II)	\$ 4,527,700	\$ 4,793,300	\$ 5,322,850	\$ 5,600,290	\$ 6,161,100	\$ 6,687,500	\$ 7,340,750	\$ 8,091,750	\$ 8,641,250	\$ 8,860,000
\$ -	(C) Excluded Debt (Tier III)	no new debt planned in FY24									
\$ 19,119,500	(A) Tier I - General Fund Capital	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500
	From ARPA for capital	\$ 1,130,000	\$ 200,000								
	From Previous Technology Funding	\$ 150,000	\$ 100,000								
	From Cemetery Fund	\$ 40,000	\$ 40,000	\$ 40,000	\$ 45,000	\$ 45,000	\$ 45,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 55,000
	From New Enterprise Fund (Storm Water)	\$ -	\$ -	\$ 1,425,000	\$ 1,250,000	\$ 1,550,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000	\$ 1,250,000
	From Revolving Funds	\$ 95,000	\$ 150,000								
	Additional Capital (not in GF)	\$ 1,415,000	\$ 490,000	\$ 1,465,000	\$ 1,295,000	\$ 1,595,000	\$ 1,295,000	\$ 1,300,000	\$ 1,300,000	\$ 1,300,000	\$ 1,305,000
\$ 31,879,500	GROSS CAPITAL PLAN	\$ 3,140,000	\$ 2,490,000	\$ 3,749,500	\$ 3,668,500	\$ 3,887,500	\$ 3,524,000	\$ 3,442,500	\$ 3,107,500	\$ 2,137,500	\$ 2,732,500
	(A) General Fund Capital (Tier I)										
	Department	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
	Schools	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Town Manager's Office	\$ 35,000	\$ 100,000	\$ 175,000	\$ 100,000	\$ -	\$ -	\$ 300,000	\$ -	\$ -	\$ -
	Facilities	\$ 355,000	\$ 230,000	\$ 340,000	\$ 140,000	\$ 585,000	\$ 160,000	\$ -	\$ 600,000	\$ -	\$ 440,000
	Finance	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Technology	\$ 120,000	\$ 260,000	\$ 510,000	\$ 520,000	\$ 155,000	\$ 120,000	\$ 300,000	\$ 100,000	\$ 130,000	\$ 180,000
	Public Library	\$ 15,000	\$ 60,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 17,500	\$ 17,500	\$ 17,500	\$ 17,500	\$ 20,000
	Planning & Land Management	\$ 55,000	\$ 50,000	\$ 50,000	\$ 20,000	\$ 20,000	\$ 325,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 30,000
	Public Safety - Fire	\$ 155,000	\$ 320,000	\$ 324,500	\$ 676,000	\$ 462,500	\$ 364,000	\$ 312,500	\$ 80,000	\$ 92,500	\$ 75,000
	Public Safety - Police	\$ 195,000	\$ 345,000	\$ 232,500	\$ 260,000	\$ 210,000	\$ 367,500	\$ 325,000	\$ 322,500	\$ 227,500	\$ 337,500
	Public Works - engineering/roads	\$ 285,000	\$ 240,000	\$ 247,500	\$ 247,500	\$ 255,000	\$ 255,000	\$ 262,500	\$ 262,500	\$ 270,000	\$ 270,000
	Public Works - parks	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
	Public Works - equipment	\$ 450,000	\$ 335,000	\$ 330,000	\$ 335,000	\$ 530,000	\$ 555,000	\$ 535,000	\$ 335,000	\$ 10,000	\$ 10,000
	GRAND TOTAL GF Capital/Tier I	\$ 1,725,000	\$ 2,000,000	\$ 2,284,500	\$ 2,373,500	\$ 2,292,500	\$ 2,229,000	\$ 2,142,500	\$ 1,807,500	\$ 837,500	\$ 1,427,500
	Town Manager's Office										
	Community Sustainability & Stewardship: Energy Conservation										
\$ 150,000	Public Safety bldg DC Fast Charging Station	ARPA									
\$ 100,000	Town buildings energy audit	ARPA									
	Energy sustainability improvements (non bldg)	\$ 35,000									
	Energy sustainability improvements (non bldg) - design			\$ 100,000							
											<i>yellow indicates design funding for possible future larger project</i>
	Community Sustainability & Stewardship: Natural Resources										
\$500,000	Middle School solar	ARPA									
\$100,000	Explore Stormwater Management Fund	ARPA									
	Culvert & Bridge Repairs										<i>see Stormwater Fund</i>
	Stormwater Management										<i>see Stormwater Fund</i>
	Warner's Pond Dredging - decide summer 2023/impact FY25										
	option a - Modified dredging \$3.9mil										<i>\$1.75m/10yr debt issued June 2022 (\$0.5mil ATM 2020/Article 11; \$1.25mil ATM 2021/Article 13.60; add'l \$0.75mil CPA funds approved)</i>
	option b - Remove Dam \$2.3mil										<i>Need \$1.4 mil additional funds, source to be determined</i>
	option c - Do Nothing										<i>Relinquish \$0.2mil CPA funds</i>
											<i>Relinquish \$0.75mil CPA funds; repurpose \$1.75mil debt already sold</i>
	Community Sustainability & Stewardship: Economic Vitality										
\$ 500,000	Assabet River Ped Bridge/West Concord										<i>this is close to 90% design, the bridge is 'funded' in the state TIP program; local funds are for extra features FY25-26 (\$500k is max)</i>
\$ 250,000	Visitor's Center: Pavillion/covered dining										<i>to be discussed</i>
	Community Sustainability & Stewardship: Recreation										
\$ 25,000	Emerson basketball court	ARPA									
\$ 25,000	Emerson tennis court	ARPA									
\$ 35,000	Rideout Park renovate bbal ct	ARPA									
\$ 45,000	Rideout Park renovate Tennis ct	ARPA									
	Community Sustainability & Stewardship: Transportation & Safety										
\$ 100,000	Ped/Bike Safety update 2018 Complete Streets	ARPA	<i>see debt</i>	<i>see debt</i>	<i>see debt</i>	<i>see debt</i>	<i>see debt</i>	\$ 100,000	<i>see debt</i>	<i>see debt</i>	<i>see debt</i>

Ten-Year Total	Description	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
	Servers (6 from 2020)		\$ 160,000					\$ 180,000			
	Wiring & Fiber (town bldgs)				\$ 40,000						
	Network improvements			\$ 130,000							
	Phone upgrades			\$ 60,000							
	Cloud migration					\$ 45,000					
\$ 50,000	explore additional MUNIS modules		Tech \$\$								
	Public Safety computers & modems	\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000		\$ 10,000	
\$ 50,000	evaluate Document Storage solution for Town	Tech \$\$									
	implement Document Storage solution for Town				\$ 300,000						
\$ 50,000	evaluate Building Security		Tech \$\$								
Technology	Surveillance improvements/replacements			\$ 100,000							
Facilities	Hunt Rec Center security/cameras			\$ 90,000							
TECHNOLOGY DEPARTMENT TOTAL		\$ 120,000	\$ 260,000	\$ 510,000	\$ 520,000	\$ 155,000	\$ 120,000	\$ 300,000	\$ 100,000	\$ 130,000	\$ 180,000
LIBRARY	Computer Equipment	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 17,500	\$ 17,500	\$ 17,500	\$ 17,500	\$ 20,000
	Chrysler Pacifica PHEV (van)		\$ 45,000								
LIBRARY DEPARTMENT TOTAL		\$ 15,000	\$ 60,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 17,500	\$ 17,500	\$ 17,500	\$ 17,500	\$ 20,000
PLM	Compact utility tractor	\$ 25,000									
	Bldg Insp vehicles - 2009 Ford Escape		\$ 30,000								
	Bldg Insp vehicles - 2009 Ford Escape			\$ 30,000							
	Chamberlin Park Bridge replace (Lowell/Keyes)	\$ 10,000					\$ 300,000				
	Conservation Land Improvements	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 15,000
	Pond Stream Management	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	\$ 15,000
PLANNING & LAND MANAGEMENT DEPARTMENT TOTAL		\$ 55,000	\$ 50,000	\$ 50,000	\$ 20,000	\$ 20,000	\$ 325,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 30,000
FIRE	Miscellaneous/unforeseen equipment needs	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 35,000
	Police & Fire radio replacements		\$ 25,000	see debt							
	Small passenger vehicle replacement										
	2009 Ford F350	\$ 50,000									
	2017 Ford explorer		\$ 50,000								
	2016 Ford Expedition (use hybrid or electric)			\$ 40,000							
	2018 Ford F150				\$ 50,000						
	2019 Ford Escape					\$ 40,000					
	2020 Ford Explorer						\$ 50,000				
	2018 Ford F250										
	2022 Ford F150										
	Turnout Gear (9 sets per year - change in FY25)	\$ 40,000	\$ 200,000					\$ 250,000			
	Fire Hose replacement			\$ 10,000					\$ 15,000		
	Medical Equipment upgrade	\$ 15,000	\$ 20,000	\$ 22,500	\$ 25,000	\$ 27,500	\$ 30,000	\$ 32,500	\$ 35,000	\$ 37,500	\$ 40,000
	Fire Training Equipment	\$ 10,000									
	Defibrillators town/school bldgs	\$ 15,000				\$ 20,000				\$ 25,000	
	Self-Contained Breathing Apparatus ('21-'39)										
	Refurbish/Replace equipment										
	2016 Engine 8 (refurb FY24; replace in FY32)	see debt									
	2018 Engine 3 (refurb FY26; replace in FY34)			\$ 227,000							
	2018 Engine 4 (refurb FY27; replace in FY35)				\$ 236,000						
	2021 Engine 5 (refurb FY29; replace FY37)						\$ 254,000				
	Cntr console boat, 40hp mercury (PV 31500)										
	RTV-1 (PV 23000)										
	RTV-2 (PV 23000)										
	2018 Horton ambulance#1 (9yrs)				\$ 340,000						
	2018 Horton ambulance#2 (9yrs)					\$ 350,000					
FIRE DEPARTMENT TOTAL		\$ 155,000	\$ 320,000	\$ 324,500	\$ 676,000	\$ 462,500	\$ 364,000	\$ 312,500	\$ 80,000	\$ 92,500	\$ 75,000
POLICE	Bullet Proof Vests		\$ 25,000					\$ 30,000			
	Tasers						\$ 95,000				
	Cruiser laptops		\$ 70,000					\$ 75,000			
	Public Safety equipment	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 32,500	\$ 32,500	\$ 32,500	\$ 32,500	\$ 32,500
	Speed Alert Trailer (3 total, 1 in FY26 is new)			\$ 30,000				\$ 40,000		\$ 45,000	
	2-Ford 20 Utility-Hybrid	\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000	
	3-Ford 21 Utility-Hybrid		\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000
	4-Ford 21 Utility-Hybrid		\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000

Ten-Year Total	Description	FY24	FY25	FY26	FY27	FY28	FY29	FY30	FY31	FY32	FY33
	5-Ford 20 Utility-Hybrid (used parking fees fund)										
	6-Ford 19 Utility	\$	\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000
	7-Ford 21 Utility-Hybrid		\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000
	8-Ford 19 Utility (TRADED)	\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000	
	9-Ford 20 Utility-Hybrid	\$ 55,000		\$ 57,500		\$ 60,000		\$ 62,500		\$ 65,000	
POLICE DEPARTMENT TOTAL		\$ 195,000	\$ 345,000	\$ 232,500	\$ 260,000	\$ 210,000	\$ 367,500	\$ 325,000	\$ 322,500	\$ 227,500	\$ 337,500
PUBLIC WORKS											
Engineering											
E-1	Explore Asset Management Tools	\$ 25,000									
E-2	Pavement Markings	\$ 90,000	\$ 90,000	\$ 92,500	\$ 92,500	\$ 95,000	\$ 95,000	\$ 97,500	\$ 97,500	\$ 100,000	\$ 100,000
E-3	Roadside Safety	\$ 75,000	\$ 75,000	\$ 77,500	\$ 77,500	\$ 80,000	\$ 80,000	\$ 82,500	\$ 82,500	\$ 85,000	\$ 85,000
E-4	Traffic Signals & Signage		\$ 75,000	\$ 77,500	\$ 77,500	\$ 80,000	\$ 80,000	\$ 82,500	\$ 82,500	\$ 85,000	\$ 85,000
E-5	Landfill Monitoring Well replacement	\$ 20,000									
E-7	Culvert & Bridge Repairs	\$ 25,000	\$ 25,000	see Storm Water EF -->							
E-9	Parking Lot Rehabilitation	see debt	see debt	\$ 25,000	see debt	\$ 50,000	see debt				
E-12	Stormwater Mgt (MS4 compliance)	\$ 50,000	\$ 50,000	see Storm Water EF -->							
PW ENGINEERING DEPARTMENT TOTAL		\$ 285,000	\$ 240,000	\$ 247,500	\$ 247,500	\$ 255,000	\$ 255,000	\$ 262,500	\$ 262,500	\$ 270,000	\$ 270,000
Parks & Trees											
P-1	Small Equipment - Parks & Trees	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
P-2	Tree Planting - Public Shade Trees & Setback T	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 55,000	\$ 55,000	\$ 55,000	\$ 55,000	\$ 55,000
PW PARKS & TREES DEPARTMENT TOTAL		\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000	\$ 65,000
Highway Maintenance											
H-1	Small Equipment - Highway	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000
	E05 2010 Ford Escape Hybrid/Admin	\$ 45,000									
	E09 2010 Ford Escape Hybrid/Admin	\$ 45,000									
	G54 2012 Chevrolet Rack Body PU	\$ 80,000									
	G72 Toro Pro-Core Aerator (turf fields)	\$ 15,000									
	H12 2009 F250 PU	\$ 95,000									
	H19 2003 F-250 PU	\$ 95,000									
	H98 2002 Caterpillar Skid Steer replacement	\$ 65,000									
	G59 2003 Stump Grinder		\$ 40,000								
	H14 2009 Ford F-550 Dump/Plow		\$ 100,000								
	H39 Screener Plant				\$ 60,000						
	G7 2014 Ford F-250 Utility/Plow		\$ 95,000								
	G57 2000 Vermeer Chipper		\$ 90,000								
	G60 1999 John Deere Tractor				\$ 60,000						
	G66 2009 Whacker Loader				\$ 100,000						
	H34 2008 35,000 GVWR Swap/Plow	see debt									
	G55 2008 35,000 GVWR Swap/Plow		see debt								
	H33 2011 35,000 GVWR Swap/Spreader/Scraper			\$ 320,000							
	H32 2010 35,000 GVWR Swap/Spreader/Scraper					\$ 320,000					
	G67 2015 Prinoth WS4S					\$ 200,000					
	H13 2014 Ford F550 19,500 Dump/Plow				\$ 105,000						
	H23 2012 Freightliner 35,000GVWR						\$ 335,000				
	H25 2012 Freightliner 35,000 GVWR							\$ 335,000			
	H11 2016 Ford F-250						\$ 105,000				
	H10 2015 Chevrolet 2500 Plow						\$ 105,000				
	H15 2015 Ford F-250 Utility/Plow								\$ 105,000		
	H41 2014 CAT 930K Loader								\$ 220,000		
	H43 2014 CAT 420F Backhoe								\$ 190,000		
PW EQUIPMENT DEPARTMENT TOTAL		\$ 450,000	\$ 335,000	\$ 330,000	\$ 335,000	\$ 530,000	\$ 555,000	\$ 535,000	\$ 335,000	\$ 10,000	\$ 10,000
Cemetery Fund											
	Grave Marker Restoration	\$10,000	\$10,000	\$10,000	\$12,500	\$12,500	\$12,500	\$15,000	\$15,000	\$15,000	\$17,500
	Misc. Cemetery Improvements (have Mstr Pla	\$30,000	\$30,000	\$30,000	\$32,500	\$32,500	\$32,500	\$35,000	\$35,000	\$35,000	\$37,500
Cemetery Fund		\$40,000	\$40,000	\$40,000	\$45,000	\$45,000	\$45,000	\$50,000	\$50,000	\$50,000	\$55,000



OLD NORTH BRIDGE

TOWN OF CONCORD

TOWN HOUSE - P.O. BOX 535
CONCORD, MASSACHUSETTS 01742

To: Select Board
From: Shannon McAndrew, Senior Administrative Assistant
Date: December 19, 2022
Re: 2023 Annual License Renewals

Enclosed please find the list of local licenses to be renewed for the 2023 calendar year.

This fall, upon my start date, Chris Carmody and myself worked together to make our annual renewal process more efficient for staff. As such, I streamlined all but one local license onto one, general application that will be used for the renewal process. This allowed me to send the same application materials to the following license holders: Class I, Class II, Common Victualler, Innholder/Lodging, and Weekday Entertainment. This application also was more thorough, asking for detailed information to allow for some much-needed record updating and maintenance moving forward. As we know, manager and contact information can change for restaurants and storefronts frequently, so it is important that we keep this information up to date. The Tour Guide License application remained the same, not requiring a more thorough application. Lastly, the Liquor License application also remained the same, which is distributed by the state's Alcoholic Beverage Control Commission, and not the Town.

I contacted the Building Department, Fire Department, Health Department, and Treasurer's Department to ensure that all license holders that applied for renewal are compliant.

An important item to note is that RapsCALLION, which was located at 208 Fitchburg Turnpike Road, did not renew their Liquor License, which frees up an On-Premise All Alcoholic Beverage License in our quota.

Next year, my goal is to make our annual renewal process even more efficient for staff *and* applicants, by moving to the e-permitting system used by other Town departments. This was something that Chris and I discussed for this year, but it was not feasible given the short amount of time between my start date and the start of the annual renewal process.

Class I & II Licenses:

1. Benzden Corporation – DBA Village European Sales and Services
2. Bradford Auto Sales Service Incorporated
3. Douglas Macone – DBA Macone Truck Sales
4. Nano's Auto Service Body, LLC – Nano's Auto
5. GJC Brothers, Incorporated – Concord Gas
6. Second Chance Cars, Incorporated – Wave Gas
7. Swedish Motor Works and Repair, LLC – DBA Concord Foreign Motors
8. William McGonagle – DBA Bill's Auto Sales

Common Victualler Licenses:

1. 12 LLC – DBA Comella's
2. 42 Main Street's Market and Café – DBA Main Street's Market and Café
3. 80 Thoreau LLC – DBA 80 Thoreau
4. A & S Walden, Incorporated – DBA Walden Italian Kitchen
5. ACM Donuts LLC – DBA Dunkin Donuts
6. Bedford Farms Ice Cream Concord, Incorporated
7. Caffe Nero Americas, Incorporated – DBA Caffe Nero
8. Campbell Scott LLC – DBA Haute Coffee
9. Ching Dynasty – DBA Asian Gourmet Sushi House
10. Colwen Management, Incorporated – DBA Residents Inn by Marriott
11. Concord's Colonial Inn One Corporation – DBA The Colonial Inn
12. Concord Country Club
13. Concord Restaurant Group – DBA Woods Hill Table
14. Concord Teacakes Etcetera, Incorporated – DBA Concord Teacakes
15. Corporate Chefs at 300 Baker Avenue
16. Corporate Chefs at 561 Virginia Road – DBA New Leaf Café
17. CRG Fresh LLC – DBA Adelita
18. Debra's Natural Gourtmet
19. Emerson Hospital Cafeteria
20. Farfalle, Incorporated – Farfalle Italian Market
21. Feng Ji, Incorporated – DBA Karma
22. Fiorellamore LLC – Fiorella's Concord
23. Helen's Restaurant
24. Kelstin Corporation – DBA 7 Eleven
25. Marben Rose LLC – DBA Reasons to be Cheerful
26. MDM Management Group (3 Locations) – DBA Dunkin Donuts
27. Naomi Convenience Corporation – DBA Nine Acre Farm Convenience

28. Nashawtuc Country Club, Incorporated
29. Nashoba Brook Bakery, LLC
30. New London Pizza
31. North Bridge Inn, Incorporated
32. Papa Razzi Trattoria of Concord – DBA Papa Razzi
33. RK Earth Corporation – DBA Dino’s Kouzina and Pizzeria
34. RK Wing Corporation – DBA Rossini’s Pizzeria and Restaurant
35. Saltbox Kitchen LLC – DBA Saltbox Kitchen
36. Starbucks Coffee Corporation, #816 – DBA Starbucks Coffee
37. Susie’s Sweet Shop, Incorporated – DBA Sorrento’s Restaurant
38. Tai-Sen, Incorporated – DBA Chang An
39. The Grateful Gourmet – DBA The Cheese Shop
40. Trail’s End Café LLC – DBA Trail’s End Café
41. Twin Seafood, Incorporated
42. Verrill Farm LLC – DBA Verrill Farm
43. West Concord Depot – DBA Club Car Café

Innholder/Lodging License:

1. Colwen Management Incorporated – DBA Residents Inn by Marriott
2. Concords Colonial Inn One Corporation – DBA The Colonial Inn
3. North Bridge Inn, Incorporated – DBA North Bridge Inn
4. Best Western Concord Hotel – DBA Best Western

Liquor Licenses:

1. 12 LLC – DBA Comella’s
2. 42 Main Streets Market and Café Incorporated – DBA Main Street’s Market and Café
3. 80 Thoreau LLC – DBA 80 Thoreau
4. Arianna Incorporated – DBA Concord Provisions
5. Artichoq Incorporated – DBA Vintages of Concord
6. Ching Dynasty Incorporated – DBA Asian Gourmet Sushi House
7. Colwen Management Incorporated – DBA Residents Inn by Marriott
8. Concords Colonial Inn One Corporation – DBA The Colonial Inn
9. Concord Market LLC – DBA Concord Market
10. Concord Restaurant Group LLC – DBA Woods Hill Table
11. Concord Rod and Gun Incorporated
12. CRG Fresh, LLC – DBA Adelita
13. Crosby’s Marketplace Incorporated – DBA Crosby’s Marketplace
14. Farfalle Incorporated – DBA Farfalle Italian Market
15. Feng Ji, Incorporated – DBA Karma
16. Fiorellamore, LLC – DBA Fiorella’s Concord
17. Musketaquid Sportsmens Club Incorporated

18. Nashawtuc Country Club, Incorporated
19. Nine Acre Wines Incorporated – DBA Nine Acre Wines
20. Papa Razzi Trattoria of Concord Incorporated – DBA Papa Razzi
21. Raunak Enterprise, Incorporated – DBA Walden Liquors
22. RK Earth Corporation – DBA Dino’s Kouzina and Pizzeria
23. RK Wing Corporation – DBA Rossini’s Pizzeria and Restaurant
24. Saltbox Kitchen LLC – DBA Saltbox Kitchen
25. Tai Sen Incorporated – DBA Chang An
26. The Grateful Gourmet Incorporated – DBA The Cheese Shop
27. Trail’s End Café LLC – DBA Trail’s End Cafe
28. West Concord Liquor Store Incorporated – DBA Concord Wine and Spirits
29. West Concord Tavern, LLC – DBA West Village Tavern

Tour Guide License:

1. Aden, Scott – Winthrop, MA
2. Aspell Adams, Alicemary – Lexington, MA
3. Beaudet, Bonnie – Littleton, MA
4. Belton, Shelley – Concord, MA
5. Berger, Melvyn – Newton, MA
6. Bierman, Mary – Wayland, MA
7. Bracco, Anna Marie – Westford, MA
8. Canally, Debra – Concord, MA
9. Cardullo, William – Richmond, VA
10. Clark, Judith – Acton, MA
11. Clayton, Elizabeth – Concord, MA
12. Cloutier, Stefanie – Concord, MA
13. Cole, Amy – Acton, MA
14. Curran, Victor – Concord, MA
15. Dawson, Steve – Carlisle, MA
16. Dewart, Timothy – Beverly, MA
17. Dorothy, Sharlene – Concord, MA
18. Ewen, Barbara – Concord, MA
19. Feeley, John – Holbrook, MA
20. Flannery, David – Carlisle, MA
21. Fousek, Bernice – Concord, MA
22. Galinat, Alice – Concord, MA
23. Gerrity, Robert – Oregon City, OR
24. Gersh, Richard – Westford, MA
25. Griffin, Mary Margaret – Boston, MA
26. Hagerstrom, James – Concord, MA
27. Hamel, Gail – Providence, MA

28. Harper, Sandra – Concord, MA
29. Harrington, Anne (Penny) – Stoneham, MA
30. Healey, Peter – Concord, MA
31. Hilton, Robert – Carlisle, MA
32. Hunt, Susan – Acton, MA
33. Kingman, Karolyn – Acton, MA
34. Kingman, Julie – Concord, MA
35. Kluft, Jacqueline – Newton, MA
36. Kuziemski, Nancy – Carlisle, MA
37. LaRosee, Susan – Waltham, MA
38. Levine, Mark – Maynard, MA
39. Martin, Kristi – Billerica, MA
40. McCormick White, Rev. Janet – La Jolla, CA
41. Morel, Diane – Stow, MA
42. Olitsky, Ronni – Concord, MA
43. Olson, Barbara – Maynard, MA
44. Palumbo, Joseph – Concord, MA
45. Pagliuca, Joan – Dedham, MA
46. Piccarreto, Richard – Stow, MA
47. Powell-Daley, Nancy – Concord, MA
48. Price, Tracy – Maynard, MA
49. Quintal, Jr., George – W. Gardiner, ME
50. Ribeiro, Elizabeth – Lexington, MA
51. Rohan, Martha – Concord, MA
52. Sacco, Frances – Tyngsborough, MA
53. Sanberg, Sonja – Concord, MA
54. Sawyer, Sylvia – Acton, MA
55. Sebor, Charles – Reading, MA
56. Sherblom, James – Concord, MA
57. Siskind, David – Concord, MA
58. Smith, Corinne – Gardner, MA
59. The Old Manse Museum – Concord, MA
60. Tobey, Cheryl – Winthrop, MA
61. Toth, Jennifer – Framingham, MA
62. Van Duzer, Beth – Concord, MA
63. Vander Wilder, Mary-Wren – Concord, MA
64. Webb, Neville – Concord, MA
65. Webb, Aidan – Concord, MA
66. Williams, Beth – Wakefield, MA
67. Wirtanen, Edward – Carlisle, MA

Weekday Entertainment License:

1. 42 Main Street's Market and Café Incorporated – DBA Main Street's Market and Café
2. Colwen Management Incorporated – DBA Residents Inn by Marriott
3. Concords Colonial Inn One Corporation – DBA The Colonial Inn
4. Concord Restaurant Group – DBA Woods Hill Table
5. CRG Fresh, LLC – DBA Adelita
6. Papa Razzi Trattoria of Concord Incorporated – DBA Papa Razzi
7. Saltbox Kitchen LLC – DBA Saltbox Kitchen
8. Trail's End Café LLC – DBA Trail's End Café

2023 ATM Warrant Article
To Adopt the DOER Specialized
Stretch Energy Building Code

Presentation to Concord Planning Board
Dec 13, 2022

Brad Hubbard-Nelson (bradhn@mindspring.com)
221 Nashawtuc Rd, Concord

Member: Climate Action Advisory Board

Proposed Warrant Article text - not yet submitted:

ARTICLE XX: To determine whether the Town will vote to adopt the Department of Energy Resources (DOER) Municipal Opt-in Specialized Stretch Code of 2022 as the building code applicable for new construction of residential, multi-family and commercial structures, effective January 1, 2024, or take any other action relative thereto.

Note: neither CAAB nor CSEC has not yet discussed or decided whether to support this article, and may do so tomorrow (Dec 14th) at CAAB/CSEC joint meeting.

Background information

- Concord adopted original Stretch Energy Code at 2010 Town Meeting, a requirement for Concord being designated as a Green Community
- MA Department of Energy Resources released an update to the Stretch Energy Building Code in 2022, as required by the Climate Act of 2021 (An Act Creating a Next Generation Roadmap for Massachusetts Climate Policy).
- Details on 2022 updated Stretch Code here:
<https://www.mass.gov/info-details/stretch-energy-code-development-2022>
- The updated building code improves energy efficiency compared with the prior Stretch Building Code. It also provides an opt-in for communities to adopt the “Specialized Stretch Code”, which makes use of advances in building science such as Passive House standards with much lower energy use over time, and improvements in HVAC technology including heat pumps.
- Adopting Specialized Stretch code requires approval by a Town Meeting vote.

Highlights: Updated Stretch vs. Specialized: RESIDENTIAL

Comparison of updated Stretch and Municipal Opt-in Specialized Energy Codes for New Low-rise Residential Buildings (1)

Building Size	Fuel Type	Minimum Efficiency		Electrification		Minimum EV Wiring	Renewable Generation	
		<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>	<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>		<i>Stretch Code</i>	<i>Specialized Opt-in Code</i>
Dwelling units up to 4,000 sf	All-electric	HERS 45* or Passive House pathways	HERS 45* or Passive House pathways	Full	Full	1 parking space	Optional	Optional
Dwelling units up to 4,000 sf	Mixed-fuels	HERS 42* or Passive House pathways	HERS 42* or Passive House pathways	Optional	Pre-wiring required	1 parking space	Optional	Solar PV: ≥4 kW for single family and ≥0.75 W/sf for multi-family (except shaded sites and Passive House certified buildings)
Dwelling units >4,000 sf	All-electric	HERS 45* or Passive House pathways	HERS 45* or Passive House pathways	Full	Full	1 parking space	Optional	Optional
Dwelling units >4,000 sf	Mixed-fuels	HERS 42* or Passive House pathways	HERS 0 or Phius ZERO	Optional	Pre-wiring required	1 parking space	Optional	Solar PV or other renewables to meet the Zero energy building definition

Updated Stretch vs. Specialized: COMMERCIAL

Comparison of updated Stretch and Municipal Opt-in Specialized Energy Codes for New Commercial Buildings (1)

Building Type	Fuel Type	Minimum Efficiency Pathway		Electrification		Minimum EV Wiring	Renewable Generation	
		Stretch Code	Specialized Opt-in Code	Stretch Code	Specialized Opt-in Code		Stretch Code	Specialized Opt-in Code
Offices and Schools >20,000 sf	All Electric	Thermal Energy Demand Intensity (TEDI) or Passive House pathways	Thermal Energy Demand Intensity (TEDI) or Passive House pathways	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
Offices and Schools >20,000 sf	Mixed-fuels	TEDI or Passive House pathways	TEDI or Passive House pathways	Optional [§]	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area
High Ventilation (Hospitals, Labs, etc.)	All Electric	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	TEDI, 10% better than 2019 ASHRAE Appendix G, or Passive House pathways	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
High Ventilation (Hospitals, Labs, etc.)	Mixed-fuels	TEDI, 10% better than 2019 ASHRAE Appendix G [‡] , or Passive House pathways	TEDI, 10% better than 2019 ASHRAE Appendix G [‡] , or Passive House pathways	Optional ^{†§}	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area
Multi-family >12,000 sf	All Electric	TEDI, HERS 45*, Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways or HERS 0 [§]	Full	Full	20% of parking spaces	Optional	Optional
Multi-family >12,000 sf	Mixed-fuels	TEDI, HERS 42*, Passive House pathways, or (until July 1, 2024) 10% better than ASHRAE Appendix G	Passive House pathways or HERS 0 [§]	Optional [§]	Pre-wiring required	20% of parking spaces	Optional	Optional
Small Commercial (<20,000 sf, except multi-family)	All Electric	Prescriptive pathway plus Stretch Code amendments	Prescriptive plus Stretch Code amendments	Full	Full	20% of parking spaces for residential and business uses, 10% for other uses	Optional	Optional
Small Commercial (<20,000 sf, except multi-family)	Mixed-fuels	Prescriptive pathway plus Stretch Code amendments	Prescriptive plus Stretch Code amendments	Optional [§]	Pre-wiring required	20% of parking spaces for residential and business uses, 10% for other uses	Optional	On-site solar PV: Minimum of 1.5W/sf for each sq foot of the 3 largest floors or 75% of Potential Solar Zone Area

Additional Information

- Concord's Climate Action Plan of 2020: reduce greenhouse gas emissions by 45% by 2030 and 80% by 2050. Electrification of buildings and transportation is the primary mechanism to achieve this, supported by CMLP transitioning to emissions free power.
- The Town voted in 2021 Article 31 to adopt a Fossil-free bylaw for new construction through a Home Rule Petition. Rather than approve the Home Rule Petition, the 2021 Climate Act exempts up to 10 communities from allowing new fossil-fuel connected buildings. (**Note: this exemption is not connected with this Article being discussed.**)
- Choosing to opt-in to the Specialized Stretch code would complement 2021 Article 31 with improved energy efficiency standards, ensuring minimal greenhouse gas emissions from new buildings going forward.

Questions?

- Any changes suggested for Warrant Article text?

Annual Town Meeting Article:

Title: Choose Town Officers

Article _____. To choose all necessary Town Officers and Committees.

Explanation: This is a request for Town Meeting to appoint any necessary Town Officers and Committees necessary to conduct the business of the Annual Town Meeting.

Submitted by: Select Board

Annual Town Meeting Article:

Title: Transfer of Housing Funds

Article ____. To determine whether the Town will vote to transfer the sum of \$1,000,000 appropriated under 30-ATM-2017 for the Christopher Heights at Junction Village senior assisted living project to the Concord Municipal Affordable Housing Trust for affordable housing and community housing purposes.

Explanation: This article seeks to transfer Free Cash previously appropriated in 2017 for the Christopher Heights at Junction Village senior assisted living project to the Concord Municipal Affordable Housing Trust (CMAHT) for affordable housing and community housing purposes. In the fall of 2022, the Town was notified by The Grantham Group, proposed developer of Christopher Heights, that the project would not be moving forward due to inability to secure the required funding. As this funding has already been set aside for affordable housing, the request is being made to transfer it to CMAHT to be held for a future affordable housing project. If no action is taken on this article, the \$1,000,000 will remain in 30-ATM-2017 until such time as Town Meeting votes to transfer it to another article or to return it to Free Cash.

Submitted by: Select Board

Annual Town Meeting Article:

Title: Hear Reports

Article ____. To hear and act upon the reports of Town Officers and Committees.

Explanation: This is a request for Town Meeting to receive any and all reports of Town Officers and Committees and to take any action as deemed appropriate.

Submitted by: Select Board

Annual Town Meeting Article:

Title: 250th Celebration

Article ____. To determine whether the Town will vote to raise and appropriate, or transfer from available funds, a sum of money to pay for expenses of the 250th Anniversary Celebration, commemorating the historic battles of Concord and Lexington, to be expended under the direction of the Town Manager, in consultation with the 250th Committee, or take any other action relative thereto.

Explanation: The year 2025 will mark the 250th anniversary of the historic battles of Concord and Lexington and 2026 will mark the 250th anniversary of the signing of the Declaration of Independence. The 200th celebration in 1975 was a grand enterprise attended by President Gerald Ford, along with other local, national, and international dignitaries. To mark these significant anniversaries in 2025 and 2026, the Select Board established the Concord 2025 Executive Committee who has been hard at work coordinating Town events with our sister communities of Lincoln, Bedford, Lexington and Arlington (Battle Road 2025); Minuteman National Historical park; Hanscom Air Force Base, the Massachusetts National Guard, local, state, regional, and federal agencies, as well as with musical, performing and historical re-enactment groups.

Submitted by: Select Board

Correspondence

Date:

1. 12/12/2022
2. 12/14/2022
3. 12/15/2022

From:

Concord Municipal Affordable Housing
Trust Concord Housing Foundation
Bob LeLacheur

Subject:

Support for HPP Approval
Support for HPP Approval
Borrowing for Middle School

From: keith@kbergman.com <keith@kbergman.com>

Sent: Monday, December 12, 2022 3:09 PM

To: Matthew Johnson <mjohnson@concordma.gov>; 'Nathan Bosdet' <Bosdet.Concord@gmail.com>

Cc: Linda Escobedo <lescobedo@concordma.gov>; 'Mike Lawson' <mlawson@bu.edu>; 'Frank Feeley' <ffeeley@bu.edu>; Kerry Lafleur <klafleur@concordma.gov>; 'Moira Walsh' <moiraandrews@gmail.com>; 'Stephan Bader' <concordcitizen@aol.com>; 'Lee Smith' <leesmith125@gmail.com>; 'Stephanie Schrobak' <schrobak9@gmail.com>; 'Diane Proctor' <dpdproctor@gmail.com>; Ray Andrews <rayandrews@comcast.net>; 'Linda Miller' <lindamiller321@gmail.com>; Elizabeth Rust <liz@rhsousing.org>; Marcia Rasmussen <mrasmussen@concordma.gov>; 'Laura Smead' <laura@jmgoldson.com>; Elizabeth Hughes <ehughes@concordma.gov>; 'Jennifer Polito' <jpolito@concordha.org>

Subject: Housing Production Plan recommended to Select Board & Planning Board by CMAHT & HPP/SC

TO: Select Board c/o chair Matt Johnson and Planning Board c/o chair Nathan Bosdet

FROM: CMAHT c/o chair Keith Bergman

This will confirm that, at its meeting today, the Concord Municipal Affordable Housing Trust Board of Trustees voted unanimously (4-0) to recommend that the Select Board and the Planning Board adopt the [updated Housing Production Plan dated December 9, 2022](#), and seek its approval from the Massachusetts Department of Housing & Community Development. We understand that the Planning Board is scheduled to take up this matter on December 13th; and the Select Board, on December 19th.

The Concord Housing Production Plan Steering Committee, meeting at the same hour and for the same purpose, also voted unanimously (4-0) to recommend that the Select Board and the Planning Board adopt the updated Housing Production Plan dated December 9, 2022, and seek its approval from the Massachusetts Department of Housing & Community Development.

Draft CMAHT meeting minutes are attached. As noted therein, members thanked Regional Housing Services Office Director Liz Rust, Concord Director of Planning and Land Management Marcia Rasmussen, Laura Smead of consultant JM Goldson LL, and the HPP update team; the HPP Steering Committee members; and all those who participated in the months' long process of updating Concord's Housing Production Plan.

Thanks, all..

Keith Bergman, Chair

[Concord Municipal Affordable Housing Trust | Concord, MA \(concordma.gov\)](http://ConcordMunicipalAffordableHousingTrust.org)

Keith Bergman
56 White Avenue
Concord, MA 01742
Keith@KBergman.com
774-353-8706

I write to convey the unanimous support of the Board of the Concord Housing Foundation for the Concord Housing Production Plan, to be considered by the Select Board on December 19.

This is an excellent piece of work. The analysis of Concord's demographics, housing stock and housing market are thorough, and present a picture even more alarming than most Concordians appreciate. The bottom line is that we have done little in recent years to help house poorer citizens. At the same time, Concord's housing stock has become more and more unaffordable, even for those who were once able to purchase a home here.

The HPP provides an extensive list of things that Concord can do to provide more affordable housing and to make our community more inclusive of citizens with a range of backgrounds and buying capacity. We hope the Select Board will approve the HPP, and then move to implementing some of the policies recommended. Otherwise, this is just a thoughtful report that will gather dust while Concord becomes a community where only the wealthiest can find a home.

Frank (Rich) Feeley

President

Concord Housing Foundation

347 Lexington Road

Concord MA 01742



Town of Concord
Finance Department
22 Monument Square
Concord, Massachusetts 01742-0535

To: Select Board
Kerry Lafleur, Town Manager
Gail Dowd, CFO

From: Bob LeLacheur, Interim Finance Director

Date: December 15, 2022

Re: Timing of Borrowing for the Middle School project

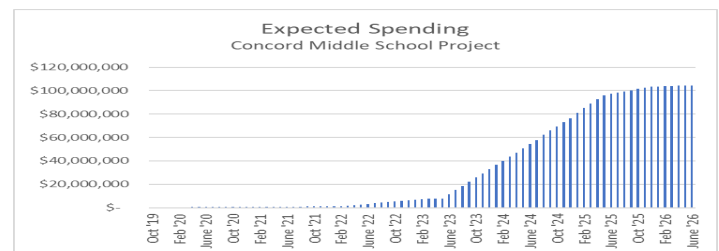
At a recent Select Board meeting, a question was asked about the impact on debt costs for staggering the initial project borrowing to match the need more closely for cash, instead of borrowing a full amount right away.

Our most recent forecast of cashflow needs for the project (including the initial \$1.5 million feasibility study) has these milestones (figures shown in \$ millions):

Funds already borrowed	\$ 13.5
Cash Remaining	\$ 7.9
Funds to be borrowed	\$ 90.8 (+\$7.2?)

Cumulative Expected Spending:

November 2022	\$ 5.6
June 2023	\$ 11.5
December 2023	\$ 32.9
June 2024	\$ 54.3
December 2024	\$ 76.6
June 2025	\$ 97.3
December 2025	\$103.4



If the project remains on schedule, the remaining cash will run out in early summer 2023, fully expected and planned because of Concord's next annual debt sale, expected in May 2023. The question may seem to become how often should the Town borrow to match remaining needs, making sure a two-month buffer is in place at all times in order to keep the project moving forward. However, the real question lies with the tax-setting practice, where the Board sets annual tax rates at a Classification Hearing only once per year in late fall. Therefore frequent borrowing will not delay the tax impact, except as it is pushed into future fiscal years.

From the figures above, the Town must borrow by late spring 2023, and then again in 2024. A possible borrowing in the spring 2025 would only be for the last \$6 million of debt (June 2025 vs. December 2025 above), and is not impactful.

The result is that the Town should borrow about half of remaining debt authorized in each of the spring 2023 and the spring 2024. This would result in the following picture of cash available for debt payments, with the two large spikes showing those two spring borrowings:



The tax impact of this pattern is simple – half of the previously discussed first year impact does not happen, and with level debt service effectively that is pushed into the 31st year. Below was analysis the Board has seen previously, with a column adding for staggering the issuance into a second year, showing the costs of the unissued debt for the project:

Financing Options for Future MS Debt

(annual costs for median homes)

Term of borrowing		25yrs	25yrs	30yrs	Stagger
					30yrs
Interest Rate		5.10%	5.25%	5.25%	5.25%
Financing Approach		Level	Level	Level	Level
		Principal	Debt	Debt	Debt
Authorized	yr 1	\$1,257	\$1,004	\$924	\$462
\$90.816 mil not yet issued	yr 2	\$1,229	\$1,004	\$924	\$924
	yr3	\$1,200	\$1,004	\$924	\$924
	yr25	\$580	\$1,004	\$924	\$924
	yr30			\$924	\$924
	yr31				\$462
Requested	yr 1	\$100	\$80	\$73	\$37
\$7.2 mil additional	yr 2	\$98	\$80	\$73	\$73
	yr3	\$95	\$80	\$73	\$73
	yr25	\$46	\$80	\$73	\$73
	yr30			\$73	\$73
	yr31				\$36

The picture for the full impact of all excluded debt, both that already issued plus the previous table, is shown below:

Projected Costs of All Excluded Debt

(annual costs for median homes)

					Stagger
Term of borrowing		25yrs	25yrs	30yrs	30yrs
Interest Rate		5.10%	5.25%	5.25%	5.25%
Financing Approach		Level	Level	Level	Level
		Principal	Debt	Debt	Debt
Authorized	yr 1	\$ 2,405	\$ 2,152	\$ 2,072	\$ 1,610
\$90.816 mil not yet issued	yr 2	\$ 2,370	\$ 2,145	\$ 2,065	\$ 2,065
	yr3	\$ 2,304	\$ 2,108	\$ 2,028	\$ 2,028
	yr25	\$ 627	\$ 1,051	\$ 971	\$ 971
	yr30	\$ -	\$ -	\$ 924	\$ 924
	yr31				\$ 462
Requested	yr 1	\$100	\$80	\$73	\$37
\$7.2 mil additional	yr 2	\$98	\$80	\$73	\$73
	yr3	\$95	\$80	\$73	\$73
	yr25	\$46	\$80	\$73	\$73
	yr30			\$73	\$73
	yr31				\$36

The staggered pattern of issuing about half of the remaining debt – whether the current amount authorized, or additional funding approved by the upcoming Special Town Meeting, will be another debt relief tool available to the Town. This approach could allow use of the Middle School Reserve Fund to be delayed by one year in order to try to shave off the peak \$2,065 shown in Year 2 above.