

#4

Junction Village/Christopher Heights of Concord HUD Environmental Review Documentation

1. Concord Conservation Commission Order of Conditions, 5/5/2017
2. Letter from Emma Lord, Wild and Scenic Rivers Program, National Park Service, 10/23/2020
3. Assisted Living Supply and Demand Study For: Christopher Heights of Concord, Concord, MA, LDS Consulting Group, January 9, 2020
4. West Concord Village Master Plan, April 2010, Stantec Planning and Landscape Architects PC
5. Concord ZBA Comprehensive Permit, May 12, 2017



Massachusetts Department of Environmental Protection
 Bureau of Resource Protection - Wetlands
WPA Form 5 - Order of Conditions
 Massachusetts Wetlands Protection Act M.G.L. c. 131, §40

Provided by MassDEP:
 MassDEP File #:137-1374
 eDEP Transaction #:921674
 City/Town:CONCORD

A. General Information

1. Conservation Commission CONCORD
2. Issuance a. OOC b. Amended OOC
3. Applicant Details
- a. First Name WALTER b. Last Name OHANIAN
- c. Organization THE GRANTHAM GROUP, LLC
- d. Mailing Address 99 PLEASANT STREET
- e. City/Town MARLBOROUGH f. State MA g. Zip Code 01752
4. Property Owner
- a. First Name b. Last Name
- c. Organization CONCORD HOUSING DEVELOPMENT CORPORATION
- d. Mailing Address P.O. BOX 1952
- e. City/Town CONCORD f. State MA g. Zip Code 01742
5. Project Location
- a. Street Address 6X WINTHROP STREET
- b. City/Town CONCORD c. Zip Code 01742
- d. Assessors 8D e. Parcel/Lot# 2013-1
- Map/Plat#
- f. Latitude 42.46111N g. Longitude 71.39520W
6. Property recorded at the Registry of Deed for:
- a. County b. Certificate c. Book d. Page
- SOUTHERN MIDDLESEX 61102 485
7. Dates
- a. Date NOI Filed : 12/1/2016 b. Date Public Hearing Closed: 5/3/2017 c. Date Of Issuance: 5/5/2017
8. Final Approved Plans and Other Documents
- a. Plan Title: b. Plan Prepared by: c. Plan Signed/Stamped by: d. Revised Final Date: e. Scale:
- CHRISTOPHER
 HEIGHTS
 ASSISTED LIVING FACILITY PLAN
 SET
 STORMWATER
 MANAGEMENT REPORT
- FUSS & O'NEILL ERIC M. BERNARDIN, P.E. APRIL 28, 2017 AS NOTED
- FUSS & O'NEILL N/A MARCH 3, 2017 N/A

B. Findings

1. Findings pursuant to the Massachusetts Wetlands Protection Act
 Following the review of the the above-referenced Notice of Intent and based on the information provided in this application and presented at the public hearing, this Commission finds that the areas in which work is proposed is significant to the following interests of the Wetlands Protection Act.



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Check all that apply:

<input checked="" type="checkbox"/> a. Public Water Supply	<input checked="" type="checkbox"/> b. Land Containing Shellfish	<input checked="" type="checkbox"/> c. Prevention of Pollution
<input checked="" type="checkbox"/> d. Private Water Supply	<input checked="" type="checkbox"/> e. Fisheries	<input checked="" type="checkbox"/> f. Protection of Wildlife Habitat
<input checked="" type="checkbox"/> g. Ground Water Supply	<input checked="" type="checkbox"/> h. Storm Damage Prevention	<input checked="" type="checkbox"/> i. Flood Control

2. Commission hereby finds the project, as proposed, is:

Approved subject to:

- a. The following conditions which are necessary in accordance with the performance standards set forth in the wetlands regulations. This Commission orders that all work shall be performed in accordance with the Notice of Intent referenced above, the following General Conditions, and any other special conditions attached to this Order. To the extent that the following conditions modify or differ from the plans, specifications, or other proposals submitted with the Notice of Intent, these conditions shall control.

Denied because:

- b. The proposed work cannot be conditioned to meet the performance standards set forth in the wetland regulations. Therefore, work on this project may not go forward unless and until a new Notice of Intent is submitted which provides measures which are adequate to protect interests of the Act, and a final Order of Conditions is issued. **A description of the performance standards which the proposed work cannot meet is attached to this Order.**
- c. The information submitted by the applicant is not sufficient to describe the site, the work or the effect of the work on the interests identified in the Wetlands Protection Act. Therefore, work on this project may not go forward unless and until a revised Notice of Intent is submitted which provides sufficient information and includes measures which are adequate to protect the interests of the Act, and a final Order of Conditions is issued. **A description of the specific information which is lacking and why it is necessary is attached to this Order as per 310 CMR 10.05(6)(c).**

- 3. Buffer Zone Impacts: Shortest distance between limit of project disturbance and the wetland resource area specified in 310CMR10.02(1)(a).
 a. linear feet

Inland Resource Area Impacts:(For Approvals Only):

Resource Area	Proposed Alteration	Permitted Alteration	Proposed Replacement	Permitted Replacement
4. <input type="checkbox"/> Bank	<u> </u> a. linear feet	<u> </u> b. linear feet	<u> </u> c. linear feet	<u> </u> d. linear feet
5. <input type="checkbox"/> Bordering Vegetated Wetland	<u> </u> a. square feet	<u> </u> b. square feet	<u> </u> c. square feet	<u> </u> d. square feet
6. <input type="checkbox"/> Land under Waterbodies and Waterways	<u> </u> a. square feet	<u> </u> b. square feet	<u> </u> c. square feet	<u> </u> d. square feet
	<u> </u> e. c/y dredged	<u> </u> f. c/y dredged		
7. <input checked="" type="checkbox"/> Bordering Land Subject to Flooding	<u>11900</u> a. square feet	<u>11900</u> b. square feet	<u>19700</u> c. square feet	<u>19700</u> d. square feet
Cubic Feet Flood Storage	<u>6420</u>	<u>6420</u>	<u>11900</u>	<u>11900</u>



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	e. cubic feet	f. cubic feet	g. cubic feet	h. cubic feet
8. <input type="checkbox"/> Isolated Land Subject to Flooding	<u> </u>	<u> </u>		
Cubic Feet Flood Storage	a. square feet	b. square feet		
	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	c. cubic feet	d. cubic feet	e. cubic feet	f. cubic feet
9. <input type="checkbox"/> Riverfront Area	<u> </u>	<u> </u>		
Sq ft within 100 ft	a. total sq. feet	b. total sq. feet		
	<u> </u>	<u> </u>	<u> </u>	<u> </u>
Sq ft between 100-200 ft	c. square feet	d. square feet	e. square feet	f. square feet
	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	g. square feet	h. square feet	i. square feet	j. square feet

Coastal Resource Area Impacts:

Resource Area	Proposed Alteration	Permitted Alteration	Proposed Replacement	Permitted Replacement
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10. <input type="checkbox"/> Designated Port Areas	Indicate size under Land Under the Ocean, below			
11. <input type="checkbox"/> Land Under the Ocean	<u> </u>	<u> </u>		
	a. square feet	b. square feet		
	<u> </u>	<u> </u>		
	c. c/y dredged	d. c/y dredged		
12. <input type="checkbox"/> Barrier Beaches	Indicate size under Coastal Beaches and/or Coastal Dunes below			
13. <input type="checkbox"/> Coastal Beaches	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	a. square feet	b. square feet	c. c/y nourishment	d. c/y nourishment
14. <input type="checkbox"/> Coastal Dunes	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	a. square feet	b. square feet	c. c/y nourishment	d. c/y nourishment
15. <input type="checkbox"/> Coastal Banks	<u> </u>	<u> </u>		
	a. linear feet	b. linear feet		
16. <input type="checkbox"/> Rocky Intertidal Shores	<u> </u>	<u> </u>		
	a. square feet	b. square feet		
17. <input type="checkbox"/> Salt Marshes	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	a. square feet	b. square feet	c. square feet	d. square feet
18. <input type="checkbox"/> Land Under Salt Ponds	<u> </u>	<u> </u>		
	a. square feet	b. square feet		
	<u> </u>	<u> </u>		
	c. c/y dredged	d. c/y dredged		
19. <input type="checkbox"/> Land Containing Shellfish	<u> </u>	<u> </u>	<u> </u>	<u> </u>
	a. square feet	b. square feet	c. square feet	d. square feet
20. <input type="checkbox"/> Fish Runs	Indicate size under Coastal Banks, inland Bank, Land Under the Ocean, and/or inland Land Under Waterbodies and Waterways, above			
	<u> </u>	<u> </u>		



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21. Land Subject to Coastal Storm Flowage
c. c/y dredged d. c/y dredged
a. square feet b. square feet

22.

Restoration/Enhancement (For Approvals Only)

If the project is for the purpose of restoring or enhancing a wetland resource area in addition to the square footage that has been entered in Section B.5.c & d or B.17.c & d above, please entered the additional amount here.

a. square feet of BVW

b. square feet of Salt Marsh

23.

Streams Crossing(s)

If the project involves Stream Crossings, please enter the number of new stream crossings/number of replacement stream crossings.

a. number of new stream crossings

b. number of replacement stream crossings

C. General Conditions Under Massachusetts Wetlands Protection Act

The following conditions are only applicable to Approved projects

1. Failure to comply with all conditions stated herein, and with all related statutes and other regulatory measures, shall be deemed cause to revoke or modify this Order.
2. The Order does not grant any property rights or any exclusive privileges; it does not authorize any injury to private property or invasion of private rights.
3. This Order does not relieve the permittee or any other person of the necessity of complying with all other applicable federal, state, or local statutes, ordinances, bylaws, or regulations.
4. The work authorized hereunder shall be completed within three years from the date of this Order unless either of the following apply:
 - a. the work is a maintenance dredging project as provided for in the Act; or
 - b. the time for completion has been extended to a specified date more than three years, but less than five years, from the date of issuance. If this Order is intended to be valid for more than three years, the extension date and the special circumstances warranting the extended time period are set forth as a special condition in this Order.
5. This Order may be extended by the issuing authority for one or more periods of up to three years each upon application to the issuing authority at least 30 days prior to the expiration date of the Order.
6. If this Order constitutes an Amended Order of Conditions, this Amended Order of Conditions does not exceed the issuance date of the original Final Order of Conditions.
7. Any fill used in connection with this project shall be clean fill. Any fill shall contain no trash, refuse, rubbish, or debris, including but not limited to lumber, bricks, plaster, wire, lath, paper, cardboard, pipe, tires, ashes, refrigerators, motor vehicles, or parts of any of the foregoing.
8. This Order is not final until all administrative appeal periods from this Order have elapsed, or if such an appeal has been taken, until all proceedings before the Department have been completed.
9. No work shall be undertaken until the Order has become final and then has been recorded in the Registry of Deeds or the Land Court for the district in which the land is located, within the chain of title of the affected property. In the case of recorded land, the Final Order shall also be noted in the Registry's Grantor Index under the name of the owner of the land upon which the proposed work is to be done. In the case of the registered



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land, the Final Order shall also be noted on the Land Court Certificate of Title of the owner of the land upon which the proposed work is done. The recording information shall be submitted to the Conservation Commission on the form at the end of this Order, which form must be stamped by the Registry of Deeds, prior to the commencement of work..

10. A sign shall be displayed at the site not less than two square feet or more than three square feet in size bearing the words,

" Massachusetts Department of Environmental Protection"
[or 'MassDEP']
File Number : "137-1374"

11. Where the Department of Environmental Protection is requested to issue a Superseding Order, the Conservation Commission shall be a party to all agency proceedings and hearings before Mass DEP.
12. Upon completion of the work described herein, the applicant shall submit a Request for Certificate of Compliance (WPA Form 8A) to the Conservation Commission.
13. The work shall conform to the plans and special conditions referenced in this order.
14. Any change to the plans identified in Condition #13 above shall require the applicant to inquire of the Conservation Commission in writing whether the change is significant enough to require the filing of a new Notice of Intent.
15. The Agent or members of the Conservation Commission and the Department of Environmental Protection shall have the right to enter and inspect the area subject to this Order at reasonable hours to evaluate compliance with the conditions stated in this Order, and may require the submittal of any data deemed necessary by the Conservation Commission or Department for that evaluation.
16. This Order of Conditions shall apply to any successor in interest or successor in control of the property subject to this Order and to any contractor or other person performing work conditioned by this Order.
17. Prior to the start of work, and if the project involves work adjacent to a Bordering Vegetated Wetland, the boundary of the wetland in the vicinity of the proposed work area shall be marked by wooden stakes or flagging. Once in place, the wetland boundary markers shall be maintained until a Certificate of Compliance has been issued by the Conservation Commission.
18. All sedimentation barriers shall be maintained in good repair until all disturbed areas have been fully stabilized with vegetation or other means. At no time shall sediments be deposited in a wetland or water body. During construction, the applicant or his/her designee shall inspect the erosion controls on a daily basis and shall remove accumulated sediments as needed. The applicant shall immediately control any erosion problems that occur at the site and shall also immediately notify the Conservation Commission, which reserves the right to require additional erosion and/or damage prevention controls it may deem necessary. Sedimentation barriers shall serve as the limit of work unless another limit of work line has been approved by this Order.

NOTICE OF STORMWATER CONTROL AND MAINTENANCE REQUIREMENTS

19. The work associated with this Order(the "Project") is (1) is not (2) subject to the Massachusetts Stormwater Standards. If the work is subject to Stormwater Standards, then the project is subject to the following conditions;
- a) All work, including site preparation, land disturbance, construction and redevelopment, shall be implemented in accordance with the construction period pollution prevention and erosion and sedimentation control plan and, if applicable, the Stormwater Pollution Prevention Plan required by the National Pollutant Discharge Elimination System Construction General Permit as required by Stormwater Standard 8. Construction period erosion, sedimentation and pollution control measures and best management practices (BMPs) shall remain in place until the site is fully stabilized.
- b) No stormwater runoff may be discharged to the post-construction stormwater BMPs unless and until a Registered Professional Engineer provides a Certification that: *i.* all construction period BMPs have been



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removed or will be removed by a date certain specified in the Certification. For any construction period BMPs intended to be converted to post construction operation for stormwater attenuation, recharge, and/or treatment, the conversion is allowed by the MassDEP Stormwater Handbook BMP specifications and that the BMP has been properly cleaned or prepared for post construction operation, including removal of all construction period sediment trapped in inlet and outlet control structures; *ii.* as-built final construction BMP plans are included, signed and stamped by a Registered Professional Engineer, certifying the site is fully stabilized; *iii.* any illicit discharges to the stormwater management system have been removed, as per the requirements of Stormwater Standard 10; *iv.* all post-construction stormwater BMPs are installed in accordance with the plans (including all planting plans) approved by the issuing authority, and have been inspected to ensure that they are not damaged and that they are in proper working condition; *v.* any vegetation associated with post-construction BMPs is suitably established to withstand erosion.

- c) The landowner is responsible for BMP maintenance until the issuing authority is notified that another party has legally assumed responsibility for BMP maintenance. Prior to requesting a Certificate of Compliance, or Partial Certificate of Compliance, the responsible party (defined in General Condition 19(e)) shall execute and submit to the issuing authority an Operation and Maintenance Compliance Statement ("O&M Statement") for the Stormwater BMPs identifying the party responsible for implementing the stormwater BMP Operation and Maintenance Plan ("O&M Plan") and certifying the following: *i.*) the O&M Plan is complete and will be implemented upon receipt of the Certificate of Compliance, and *ii.*) the future responsible parties shall be notified in writing of their ongoing legal responsibility to operate and maintain the stormwater management BMPs and implement the Stormwater Pollution Prevention Plan.
- d) Post-construction pollution prevention and source control shall be implemented in accordance with the long-term pollution prevention plan section of the approved Stormwater Report and, if applicable, the Stormwater Pollution Prevention Plan required by the National Pollutant Discharge Elimination System Multi-Sector General Permit.
- e) Unless and until another party accepts responsibility, the landowner, or owner of any drainage easement, assumes responsibility for maintaining each BMP. To overcome this presumption, the landowner of the property must submit to the issuing authority a legally binding agreement of record, acceptable to the issuing authority, evidencing that another entity has accepted responsibility for maintaining the BMP, and that the proposed responsible party shall be treated as a permittee for purposes of implementing the requirements of Conditions 19(f) through 19(k) with respect to that BMP. Any failure of the proposed responsible party to implement the requirements of Conditions 19(f) through 19(k) with respect to that BMP shall be a violation of the Order of Conditions or Certificate of Compliance. In the case of stormwater BMPs that are serving more than one lot, the legally binding agreement shall also identify the lots that will be serviced by the stormwater BMPs. A plan and easement deed that grants the responsible party access to perform the required operation and maintenance must be submitted along with the legally binding agreement.
- f) The responsible party shall operate and maintain all stormwater BMPs in accordance with the design plans, the O&M Plan, and the requirements of the Massachusetts Stormwater Handbook.
- g) The responsible party shall:
 - 1. Maintain an operation and maintenance log for the last three (3) consecutive calendar years of inspections, repairs, maintenance and/or replacement of the stormwater management system or any part thereof, and disposal (for disposal the log shall indicate the type of material and the disposal location);
 - 2. Make the maintenance log available to MassDEP and the Conservation Commission ("Commission") upon request; and
 - 3. Allow members and agents of the MassDEP and the Commission to enter and inspect the site to evaluate and ensure that the responsible party is in compliance with the requirements for each BMP established in the O&M Plan approved by the issuing authority.



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- h) All sediment or other contaminants removed from stormwater BMPs shall be disposed of in accordance with all applicable federal, state, and local laws and regulations.
- i) Illicit discharges to the stormwater management system as defined in 310 CMR 10.04 are prohibited.
- j) The stormwater management system approved in the Order of Conditions shall not be changed without the prior written approval of the issuing authority.
- k) Areas designated as qualifying pervious areas for the purpose of the Low Impact Site Design Credit (as defined in the MassDEP Stormwater Handbook, Volume 3, Chapter 1, Low Impact Development Site Design Credits) shall not be altered without the prior written approval of the issuing authority.
- l) Access for maintenance, repair, and/or replacement of BMPs shall not be withheld. Any fencing constructed around stormwater BMPs shall include access gates and shall be at least six inches above grade to allow for wildlife passage.

Special Conditions:

D. Findings Under Municipal Wetlands Bylaw or Ordinance

1. Is a municipal wetlands bylaw or ordinance applicable? Yes No

2. The Conservation Commission hereby (check one that applies):

a. DENIES the proposed work which cannot be conditioned to meet the standards set forth in a municipal ordinance or bylaw specifically:

1. Municipal Ordinance or Bylaw _____

2. Citation _____

Therefore, work on this project may not go forward unless and until a revised Notice of Intent is submitted which provides measures which are adequate to meet these standards, and a final Order or Conditions is issued. Which are necessary to comply with a municipal ordinance or bylaw:

b. APPROVES the proposed work, subject to the following additional conditions.

1. Municipal Ordinance or Bylaw CONCORD WETLANDS BYLAW

2. Citation ARTICLE 43 OF 2009 TOWN MEETING, AS AMENDED

3. The Commission orders that all work shall be performed in accordance with the following conditions and with the Notice of Intent referenced above. To the extent that the following conditions modify or differ from the plans, specifications, or other proposals submitted with the Notice of Intent, the conditions shall control.

The special conditions relating to municipal ordinance or bylaw are as follows:
SEE ATTACHED 6X WINTHROP STREET SPECIAL CONDITIONS.



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E. Signatures

This Order is valid for three years from the date of issuance, unless otherwise specified pursuant to General Condition #4. If this is an Amended Order of Conditions, the Amended Order expires on the same date as the original Order of Conditions.

5/5/17
1. Date of Original Order

Please indicate the number of members who will sign this form. This Order must be signed by a majority of the Conservation Commission.

5
2. Number of Signers

The Order must be mailed by certified mail (return receipt requested) or hand delivered to the applicant. A copy also must be mailed or hand delivered at the same time to the appropriate Department of Environmental Protection Regional Office, if not filing electronically, and the property owner, if different from applicant.

Signatures:

Lynn G. Higgins

Gregory E. Higgins

Jeffrey W. Adams

Charles D. Poutasse

Judith R. Zaunbrecher

[] by hand delivery on

[X] by certified mail, return receipt requested, on

Date

Date May 5, 2017

F. Appeals

The applicant, the owner, any person aggrieved by this Order, any owner of land abutting the land subject to this Order, or any ten residents of the city or town in which such land is located, are hereby notified of their right to request the appropriate MassDEP Regional Office to issue a Superseding Order of Conditions. The request must be made by certified mail or hand delivery to the Department, with the appropriate filing fee and a completed Request for Departmental Action Fee Transmittal Form, as provided in 310 CMR 10.03(7) within ten business days from the date of issuance of this Order. A copy of the request shall at the same time be sent by certified mail or hand delivery to the Conservation Commission and to the applicant, if he/she is not the appellant.

Any appellants seeking to appeal the Department's Superseding Order associated with this appeal will be required to demonstrate prior participation in the review of this project. Previous participation in the permit proceeding means the submission of written information to the Conservation Commission prior to the close of the public hearing, requesting a Superseding Order, or providing written information to the Department prior to issuance of a Superseding Order.

The request shall state clearly and concisely the objections to the Order which is being appealed and how the Order does not contribute to the protection of the interests identified in the Massachusetts Wetlands Protection Act (M.G.L. c. 131, § 40), and is inconsistent with the wetlands regulations (310 CMR 10.00). To the extent that the Order is based on a municipal ordinance or bylaw, and not on the Massachusetts Wetlands Protection Act or regulations, the Department has no appellate jurisdiction.

Project Description: To construct an 83-unit affordable assisted living facility with associated driveway, parking, drainage, grading, and utilities, portions of which work are within Bordering Land Subject to Flooding and the 100-foot Buffer Zone to Bordering Vegetated Wetlands.

Finding:

A) This Order is issued under the Massachusetts Wetlands Protection Act, M.G.L. Chapter 131, Section 40 and the Concord Wetlands Bylaw, Article 43 approved at 2009 Town Meeting, as amended.

Therefore, under the Order of Conditions issued under DEP File Number 137-1374, the Commission hereby finds that in addition to standard Conditions #1-19 above, the following special conditions are necessary in accordance with the Performance Standards set forth in the regulations to protect the interests checked above.

The Commission orders that all work shall be performed in accordance with said conditions and with the Notice of Intent referenced above. To the extent that the following conditions modify or differ from the plans, specifications or other proposals submitted with the Notice of Intent, the conditions shall control.

Special Conditions:

20. Prior to the issuance of a Building Permit, the Applicant shall provide a metes and bounds plan to the Natural Resources Director of the area to be placed under a permanent Conservation Restriction. This area shall approximate the 6.7 acres between the leasehold limit and the eastern and southern property lines, as shown on the Lease Area Plan (Sheet C1.01, last revised March 30, 2017).
21. Prior to the issuance of a Building Permit, the Property Owner shall complete a Conservation Restriction (CR) pursuant to M.G.L. Chapter 184, §§ 31-33, on the restricted property. To be considered complete, the CR must be accepted and approved by the Natural Resources Commission and the Select Board. The Property Owner shall also obtain approval from the Secretary of the Executive Office of Energy and Environmental Affairs, and record the CR at the Registry of Deeds, but this approval and recording is not required prior to issuance of the Building Permit. The Conservation Restriction shall be deeded to the Town of Concord acting by and through its Natural Resources Commission as its Conservation Commission in perpetuity and exclusively for conservation purposes.
22. Prior to issuance of a Building Permit, the Applicant shall install permanent visible markers along the Conservation Restriction boundary. The location of the proposed boundary markers shall be provided to the Natural Resources Director for review and approval.
23. Prior to the issuance of a Building Permit, the Property Owner shall develop and submit a Baseline Documentation Report of the restricted land to be conducted in accordance with MassAudubon's Massachusetts Conservation Restriction Stewardship Manual (March

2006), or as approved by the Division of Natural Resources. Two copies of the completed report, and an electronic version, shall be provided to the Division of Natural Resources.

24. Prior to the issuance of a Building Permit, as part of the Applicant's in-kind contribution identified in the Comprehensive Permit, the Applicant shall remove from the Conservation Restriction land all surficial debris, such as dumped appliances, fixtures, and tires, unless it is determined to be historically significant by the Planning Board.
25. The Applicant shall commence mitigation measures during the first growing season following issuance of this Order.
26. Prior to the commencement of any site work, with the exception of installing erosion and sedimentation controls, a preconstruction conference shall be held on site that includes the Applicant, engineer, general contractor and Natural Resources staff. The Applicant shall notify the Division of Natural Resources at least two weeks before project commences in order to schedule this preconstruction conference.
27. This Order of Conditions shall apply to any successor in interest or successor in control of this property. The Natural Resources Commission (acting as the Conservation Commission) shall be notified in writing, at the time of such transfer, or any transfer in title for all or part of the property that occurs prior to the issuance of the Certificate of Compliance. Prior to any transfer of title the Order of Conditions shall be filed at the Registry of Deeds. A lack of such required written notification to the Conservation Commission may delay the issuance of the Certificate of Compliance.
28. The siltation barrier shall be installed as proposed on the approved plan. Any slash vegetation cut to install the erosion controls shall be removed and not placed within wetland resource areas. The siltation barrier shall define the limit of work, including prohibiting unauthorized removal or cutting of vegetation within the 100-foot wetland buffer.
29. All proper erosion and sedimentation control measures shall be taken during and after construction to insure that no sedimentation will occur to downgradient wetland resource areas. The applicant shall be responsible for the establishment of permanent erosion control on all slopes within jurisdictional areas using, but not limited to, erosion control blankets and permanent vegetative cover.
30. All fill and/or mulch incorporated into the site must be clean, debris free and devoid of invasive plants or their parts or seeds.
31. All construction materials, earth stockpiles, landscaping materials, slurry pits, waste products, refuse, debris, stumps, slash, or excavate may only be stockpiled or collected in areas as shown and labeled on the approved plan(s), or if no such areas are shown, must be placed or stored outside all areas subject to jurisdiction under the MA Wetlands Protection Act and the Concord Wetlands Bylaw under cover and surrounded by a double-staked row

of straw bales to prevent runoff. If sedimentation reaches a resource area, the Applicant or Contractor shall immediately notify the Division of Natural Resources at 978.318.3285.

32. Any damage to any wetland resource areas protected under the MA Wetlands Protection Act (M.G.L. c.131 s.40) and/or the Town of Concord Wetlands Bylaw caused by this project shall be the responsibility of the Applicant to repair, restore and/or replace. Sedimentation or erosion into jurisdictional areas shall be considered damage to wetland resource areas.
33. If dewatering of areas is required, no discharge of water is allowed in areas subject to jurisdiction without the submittal of a dewatering plan to the Commission for approval.
34. Erosion controls shall not be removed until approved by the Division of Natural Resources.
35. No trash dumpsters will be allowed within areas subject to protection under the MA Wetlands Protection Act or the Concord Wetlands Bylaw.
36. Machinery shall not be stored in the buffer zone. Machinery and delivery trucks shall be managed in a manner that does not result in damage to vegetation, create unnecessary soil compaction, or result in disturbance of sensitive areas.
37. All construction shall comply with Title V Commonwealth of Massachusetts Environmental Code, Minimum Requirements for the Subsurface Disposal of Sanitary Sewage, and the Town of Concord, Board of Health Regulations.
38. All drainage structures shall be installed and be maintained on a regular basis so as to function properly for their intended purposes. Any catch basins with sumps shall be cleaned a minimum of twice a year including at least once in the spring and once in the fall.
39. All maintenance conditions specified in this Order shall be ongoing and shall not expire at the end of the project construction or with the issuance with the Certificate of Compliance. It shall be the responsibility of the property owner to see that the maintenance conditions are complied with as required.
40. Storage, use and disposal of any "Hazardous Material" during and following construction shall comply with the Town of Concord Groundwater Protection Bylaw as approved under Article 42 of the 1981 Town Meeting.
41. The Commission shall be notified at least five (5) working days prior to the start of any site work or related construction.
42. No underground sprinkler systems shall be installed within the 100-foot buffer zone without further application and approval pursuant to the MA Wetlands Protection Act,

MGL Ch. 131, §40. Any proposed use of an underground sprinkler system shall have an automatic storm detector system.

43. Proposed use of herbicides, pesticides, or fertilizers within jurisdictional areas shall be reviewed and approved by the Natural Resources Commission or its agent prior to application.
44. The Applicant shall acquire and maintain, in full force and effect, all other permits and approvals required for the proposed construction.
45. A copy of the Order of Conditions, as well as the approved plan, shall be readily available onsite in a water tight box affixed to a sign bearing the DEP file number (not nailed to a tree) while activities regulated by this Order are being performed and until the issuance of the Certificate of Compliance. Copies of this document shall be provided to all contractors and subcontractors who shall also be held responsible for compliance with this Order.
46. Site clearing and any construction debris shall be promptly removed from the site in accordance with all applicable laws and regulations.
47. No fuels or other potential liquid contaminants shall be stored, at any time, within jurisdictional areas.
48. The Applicant shall furnish to the Natural Resources Director such written and oral reports as the Director may, from time to time, request demonstrating compliance with this Order of Conditions. Without request, the Applicant shall immediately notify the Director if any violation of this Order of Condition occurs.
49. All work shall be completed in substantial accordance with a construction schedule furnished to the Natural Resources Director prior to the commencement of work. No changes shall be made in the construction schedule without the approval of the Director.
50. During all phases of construction, all disturbed or exposed soil surfaces shall be brought to final finished grade and stabilized within thirty (30) days. Bare ground that cannot be permanently stabilized within thirty (30) days shall be loamed and seeded or stabilized with mulch or any other protective covering and/or method approved by the Natural Resources Director.
51. Trees scarred by equipment shall be attended to properly and promptly. In landscaping the finish grade, trunks of trees shall not be covered with more than two inches of soil.
52. The work authorized hereunder shall be completed within three years from the date of this Order (please refer to General Conditions #4 & #5 for exceptions). This Order may be extended by the issuing authority for one or more periods of up to three years each upon application to the issuing authority at least 30 days prior to the expiration date of the Order. Your Order expires on **May 5, 2020**.

53. Upon completion of the project, the Applicant shall request a Certificate of Compliance from the Commission. Mitigation, including full execution of the Conservation Restriction, must be complete before a Certificate of Compliance is issued. The request shall be accompanied by submission of as-built plans within jurisdictional areas and a written statement by a professional engineer or surveyor registered in the Commonwealth of Massachusetts, or other qualified professional acceptable to the Commission, certifying compliance with the approved plans referenced above in this Order of Conditions and setting forth deviations, if any exist. Calculations of the actual cut and fill volumes within BLSF and the compensatory flood storage created at each elevation below the 100-year flood elevation shall be provided in one-foot increments to document that the appropriate flood storage was provided.

THE COMMONWEALTH OF MASSACHUSETTS

DEPARTMENT OF CORRECTION

REMAINING LAND
 51+ ACRES
 2,716± REMAINING FRONTAGE
 EXECUTIVE ORDER 22EX, PAGE 479

COMMONWEALTH OF MASSACHUSETTS

PARCEL A
 12.8+ ACRES
 EXECUTIVE ORDER 22EX, PAGE 479

MAP 9E, BLOCK 37941
 NORMANDY CONCORD
 ACQUISITION, LLC.
 BOOK 48668, PAGE 397

PERCOLATION TEST DATA

PERC #	DEPTH (INCHES)	STABILIZED RATE (MIN-INCH)
109-A	64	<2
109-B	48	<2
109-C	54	<2
109-D	62	<2
109-E	58	<2
109-F	36	<2

DEEP TEST DATA

DEEP #	DEPTH (INCHES)	ROCK DEPTH (INCHES)	ESTIMATED SEASONAL HIGH GROUNDWATER DEPTH (INCHES)	SOIL DESCRIPTION
109-1	136	>136	136	0'-60" FILL, MIXED SOIL & DEBRIS 60"-136" - MED SAND W/ 10% GRAVEL
109-2	124	>124	124	0'-20" FILL, MIXED SOIL & DEBRIS 20"-74" - MED SAND W/ NO GRAVEL 74"-124" - MED SAND W/ 10% GRAVEL
109-3	124	>124	124	0'-28" FILL, MIXED SOIL & DEBRIS 28"-124" - MED SAND W/ 10% GRAVEL
109-4	130	>130	130	0'-40" FILL, MIXED SOIL & DEBRIS 40"-130" - MED SAND W/ 10% GRAVEL
109-5	130	>130	130	0'-36" FILL, MIXED SOIL & DEBRIS 40"-130" - MED SAND W/ 10% GRAVEL
109-6	120	>120	94	0'-4" LOAMY SAND, SBK, wf 4"-45" - MED SAND W/ NO GRAVEL 45"-120" - MED SAND W/ 10% GRAVEL

LEGEND & ABBREVIATIONS

- PROPERTY LINE
- EASEMENT
- MAJOR CONTOURS 140
- MINOR CONTOURS 139
- 100-YEAR FLOODPLAIN (ELEV. 124)
- FLOODPLAIN CONSERVANCY DISTRICT
- WETLAND CONSERVANCY DISTRICT
- WETLAND LINE
- BANK
- 100' WETLAND BUFFER ZONE
- 100' RIVERFRONT AREA
- 200' RIVERFRONT AREA
- TREE LINE
- EDGE OF PAVEMENT
- FENCE
- OVERHEAD WIRE
- UNDERGROUND GAS
- WATER LINE
- JERSEY BARRIER
- RETAINING WALL
- CONCRETE BOUND
- SANITARY MANHOLE
- UTILITY POLE
- LIGHT POLE
- WATER VALVE
- HYDRANT
- SIGN
- TREE
- WETLAND/BANK FLAG
- DRYWELL
- GAS VALVE
- PERCOLATION TEST POINT
- DEEP SOIL TEST POINT

MAP 8D, BLOCK 2168

WHALE ROCK LLC
 BOOK 46705, PAGE 295

MAP 9D, BLOCK 2175
 MATTHEW W. JOHNSON &
 MARGOT B. KIMBALL
 BOOK 28612, PAGE 209

MAP 9D, BLOCK 2183-CD
 ASSABET RIVER REALTY LLC
 BOOK 32540, PAGE 209

MAP REFERENCE

- EXISTING CONDITIONS DEPICTED ON THIS PLAN ARE BASED ON:
 - AN AUTOCAD FILE PROVIDED BY PLACES ASSOCIATED, INC. ON FEBRUARY 24, 2016.
 - SUPPLEMENTAL SITE SURVEY PERFORMED BY FUSS & O'NEILL ON OCTOBER 20, 2016.
- THE HORIZONTAL (NAD 83) AND VERTICAL (NAVD 88) DATUMS WERE DERIVED FROM GPS OBSERVATIONS AND ARE BASED ON THE MASSACHUSETTS STATE PLAN COORDINATE SYSTEM.
- DEEP SOIL TEST PIT AND PERCOLATION TEST LOCATIONS AND INFORMATION WAS PREPARED BY GOLDSMITH, PREST, & RINGWALL, INC.
- WETLAND DELINEATION IS BASED ON AN "ORDER OF RESOURCE AREA DELINEATION," MASSDEP FILE #137-1203, ISSUED APRIL 19, 2013.
- 100 YEAR FLOOD BOUNDARY BASED ON "FIRM, FLOOD INSURANCE RATE MAP, MIDDLESEX COUNTY, MASSACHUSETTS, (ALL JURISDICTIONS), MAP NUMBER 2501700359F, MAP REVISED JULY 7, 2014.

GENERAL NOTES

- SYMBOLS AND LEGENDS OF PROJECT FEATURES ARE GRAPHIC REPRESENTATIONS AND ARE NOT NECESSARILY SHOWN ON THE DRAWINGS TO SCALE OR TO THEIR ACTUAL DIMENSION OR LOCATION. COORDINATE DETAIL SHEET DIMENSIONS, MANUFACTURERS' LITERATURE, SHOP DRAWINGS AND FIELD MEASUREMENTS OF SUPPLIED PRODUCTS FOR LAYOUT OF THE PROJECT FEATURES.
 - DO NOT RELY SOLELY ON ELECTRONIC VERSIONS OF DRAWINGS, SPECIFICATIONS, AND DATA FILES THAT ARE PROVIDED BY THE ENGINEER. FIELD VERIFY LOCATION OF PROJECT FEATURES.
 - PERFORM NECESSARY CONSTRUCTION NOTIFICATIONS, APPLY FOR AND OBTAIN NECESSARY PERMITS, PAY FEES, AND POST BONDS ASSOCIATED WITH THE WORK AS REQUIRED BY THE CONTRACT DOCUMENTS.
 - SEE ARCHITECTURAL DRAWINGS FOR DIMENSIONS OF BUILDINGS AND ADJACENT SITE ELEMENTS INCLUDING SIDEWALKS, RAMPS, BUILDING ENTRANCES, STAIRWAYS, UTILITY PENETRATIONS, CONCRETE DOOR PADS, COMPACTOR PAD, LOADING DOCKS, BOLLARDS, ETC.
 - LOCATION OF UTILITIES SHOWN HEREON ARE THE RESULT OF SURFACE EVIDENCE AS LOCATED BY FIELD SURVEY, PLANS OF RECORD, INFORMATION FURNISHED BY THE RESPECTIVE UTILITY COMPANIES, AND OTHER AVAILABLE SOURCES. THIS PLAN DOES NOT NECESSARILY DEPICT THE EXACT LOCATION OF ALL UTILITIES WHICH MAY EXIST AT THIS TIME WITHIN THE PREMISES SURVEYED. LOCATIONS SHOULD BE VERIFIED BY THE RESPECTIVE UTILITY COMPANY BEFORE BEING RELIED UPON. ALL FIELD CHANGES MUST BE APPROVED BY THE ENGINEER.
 - LOCATION AND INVERTS OF EXISTING UTILITIES SHALL BE VERIFIED WITH THE ENGINEER PRIOR TO CONSTRUCTION. ALL FIELD CHANGES MUST BE APPROVED BY THE ENGINEER.
 - FUSS & O'NEILL MAKES NO GUARANTEES THAT THE UNDERGROUND UTILITIES SHOWN COMPRISE ALL SUCH UTILITIES IN THE AREA. FUSS & O'NEILL FURTHER DOES NOT WARRANT THAT THE UNDERGROUND UTILITIES SHOWN ARE IN THE EXACT LOCATION INDICATED. FUSS & O'NEILL HAS NOT PHYSICALLY LOCATED THE UNDERGROUND UTILITIES BEFORE CONSTRUCTION, THE CONTRACTOR SHALL CALL DIG SAFE SYSTEMS FOR CLEARANCE.
 - REFER TO CONTRACT DOCUMENTS FOR GEOTECHNICAL REQUIREMENTS.
- REGULATORY REQUIREMENTS
- THIS PROJECT DISTURBS AREAS LOCATED WITHIN DEPARTMENT OF ENVIRONMENTAL PROTECTION (DEP) REGULATED AREAS AND REQUIRES THE FILING OF A NOTICE OF INTENT (NOI), POTOMAC CAPITAL ADVISORS, INC. HAS SUBMITTED REQUIRED INFORMATION TO THE DEP AND CONCORD CONSERVATION COMMISSION.
 - NOTIFY CONCORD CONSERVATION COMMISSION A MINIMUM OF 72 HOURS PRIOR TO CONSTRUCTION.
 - FIELD INSPECTOR SHALL BE NOTIFIED 48 HOURS PRIOR TO CONSTRUCTION.
 - POST DEP SIGN NUMBER ASSIGNED IN ACCORDANCE WITH THE ORDER OF CONDITIONS.
 - APPROVED PLANS SHALL BE ON SITE AT ALL TIMES.
 - WITHIN LOCAL RIGHTS-OF-WAY, PERFORM THE WORK IN ACCORDANCE WITH LOCAL MUNICIPAL STANDARDS.
 - WITHIN STATE RIGHTS-OF-WAY, PERFORM THE WORK IN ACCORDANCE WITH THE MASS DEPARTMENT OF TRANSPORTATION STANDARD SPECIFICATIONS.
 - THE CONTRACTOR IS RESPONSIBLE FOR SITE SECURITY AND JOB SAFETY. PERFORM CONSTRUCTION ACTIVITIES IN ACCORDANCE WITH OSHA STANDARDS AND LOCAL REQUIREMENTS.
 - DISPOSE OF DEMOLITION DEBRIS IN ACCORDANCE WITH APPLICABLE FEDERAL, STATE AND LOCAL REGULATIONS, ORDINANCES AND STATUTES.
 - THIS PROJECT DISTURBS MORE THAN ONE ACRE OF LAND OR IS A PHASE OF A LARGER PROJECT THAT DISTURBS MORE THAN AN ACRE AND REQUIRES THE COMPLETION OF A STORMWATER POLLUTION PREVENTION PLAN (SWPPP) AND THE FILING OF A CONSTRUCTION GENERAL PERMIT (CGP). THE SWPPP SHALL REMAIN ON SITE AT ALL TIMES. THE CONTRACTOR IS RESPONSIBLE FOR THE FILING OF THE CGP.
 - CALL DIG-SAFE 811 OR 1-888-DIG-SAFE A MINIMUM OF 72 HOURS PRIOR TO CONSTRUCTION.

THE GRANHAM GROUP, LLC.

EXISTING CONDITIONS PLAN

CHRISTOPHER HEIGHTS ASSISTED LIVING FACILITY PROJECT

CONCORD MASSACHUSETTS

PROJ. No.: 20150485.A10
 DATE: 11/16/2016

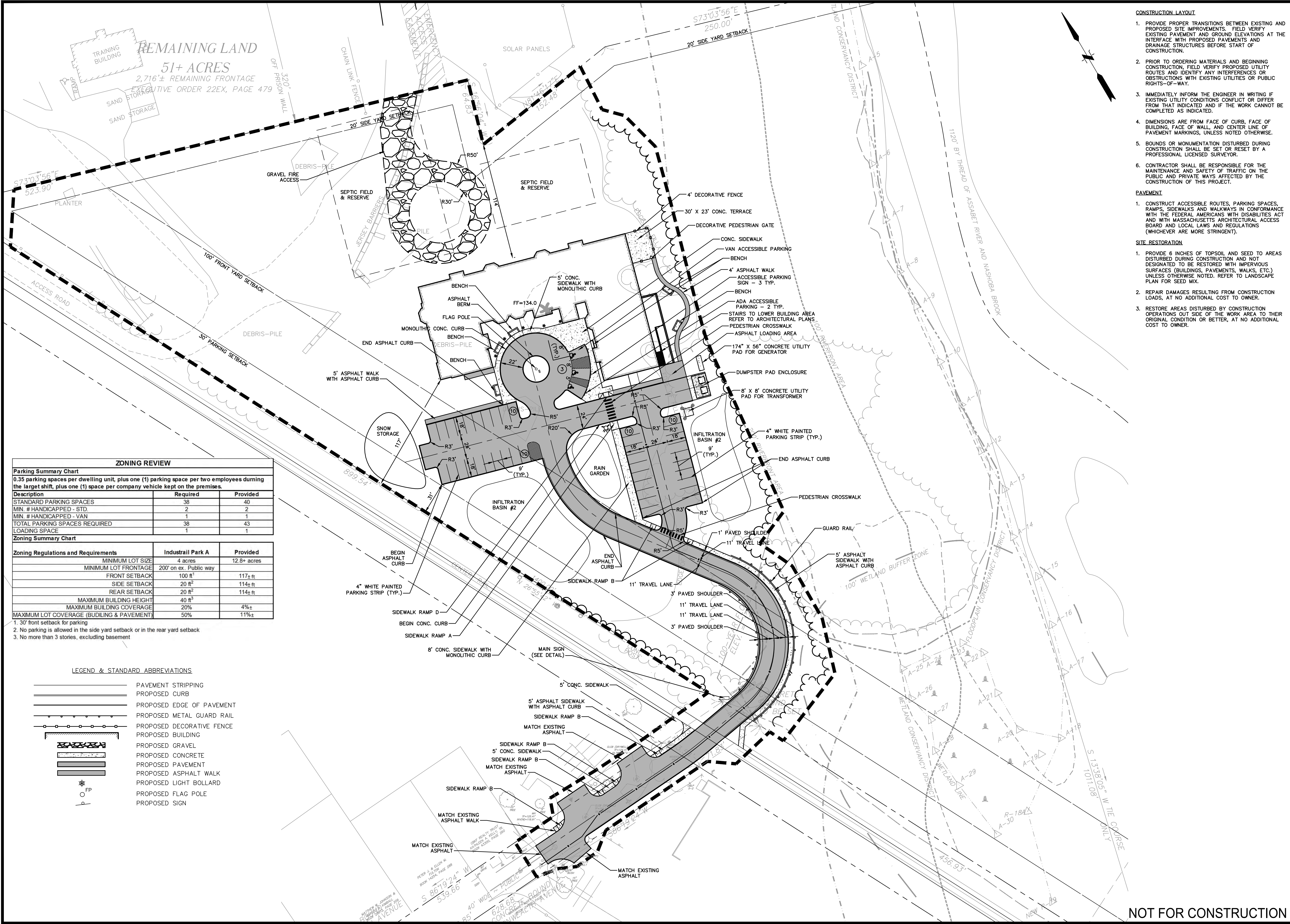
C1.00

NOT FOR CONSTRUCTION

SCALE: HORIZ.: 1" = 40'
 VERT.: 1" = 4'
 DATUM: NAD 83
 HORIZ.: 1" = 40'
 VERT.: 1" = 4'

FUSS & O'NEILL
 78 INTERSTATE DRIVE
 CONCORD, MA 01734
 413.452.0445
 www.fussandoneill.com

DESIGNER: [] REVIEWER: []
 DATE: [] DESCRIPTION: [] No. []



ZONING REVIEW

Parking Summary Chart

0.35 parking spaces per dwelling unit, plus one (1) parking space per two employees during the largest shift, plus one (1) space per company vehicle kept on the premises.

Description	Required	Provided
STANDARD PARKING SPACES	38	40
MIN. # HANDICAPPED - STD.	2	2
MIN. # HANDICAPPED - VAN	1	1
TOTAL PARKING SPACES REQUIRED	38	43
LOADING SPACE	1	1

Zoning Summary Chart

Zoning Regulations and Requirements	Industrial Park A	Provided
MINIMUM LOT SIZE	4 acres	12.8+ acres
MINIMUM LOT FRONTAGE	200' on ex. Public way	
FRONT SETBACK	100 ft ²	117± ft
SIDE SETBACK	20 ft ²	114± ft
REAR SETBACK	20 ft ²	114± ft
MAXIMUM BUILDING HEIGHT	40 ft ³	
MAXIMUM BUILDING COVERAGE	20%	4%±
MAXIMUM LOT COVERAGE (BUILDING & PAVEMENT)	50%	11%±

- 30' front setback for parking
- No parking is allowed in the side yard setback or in the rear yard setback
- No more than 3 stories, excluding basement

LEGEND & STANDARD ABBREVIATIONS

- PAVEMENT STRIPPING
- PROPOSED CURB
- PROPOSED EDGE OF PAVEMENT
- PROPOSED METAL GUARD RAIL
- PROPOSED DECORATIVE FENCE
- PROPOSED BUILDING
- PROPOSED GRAVEL
- PROPOSED CONCRETE
- PROPOSED PAVEMENT
- PROPOSED ASPHALT WALK
- PROPOSED LIGHT BOLLARD
- PROPOSED FLAG POLE
- PROPOSED SIGN

CONSTRUCTION LAYOUT

- PROVIDE PROPER TRANSITIONS BETWEEN EXISTING AND PROPOSED SITE IMPROVEMENTS. FIELD VERIFY EXISTING PAVEMENT AND GROUND ELEVATIONS AT THE INTERFACE WITH PROPOSED PAVEMENTS AND DRAINAGE STRUCTURES BEFORE START OF CONSTRUCTION.
- PRIOR TO ORDERING MATERIALS AND BEGINNING CONSTRUCTION, FIELD VERIFY PROPOSED UTILITY ROUTES AND IDENTIFY ANY INTERFERENCES OR OBSTRUCTIONS WITH EXISTING UTILITIES OR PUBLIC RIGHTS-OF-WAY.
- IMMEDIATELY INFORM THE ENGINEER IN WRITING IF EXISTING UTILITY CONDITIONS CONFLICT OR DIFFER FROM THAT INDICATED AND IF THE WORK CANNOT BE COMPLETED AS INDICATED.
- DIMENSIONS ARE FROM FACE OF CURB, FACE OF BUILDING, FACE OF WALL, AND CENTER LINE OF PAVEMENT MARKINGS, UNLESS NOTED OTHERWISE.
- BOUNDS OR MONUMENTATION DISTURBED DURING CONSTRUCTION SHALL BE SET OR RESET BY A PROFESSIONAL LICENSED SURVEYOR.
- CONTRACTOR SHALL BE RESPONSIBLE FOR THE MAINTENANCE AND SAFETY OF TRAFFIC ON THE PUBLIC AND PRIVATE WAYS AFFECTED BY THE CONSTRUCTION OF THIS PROJECT.

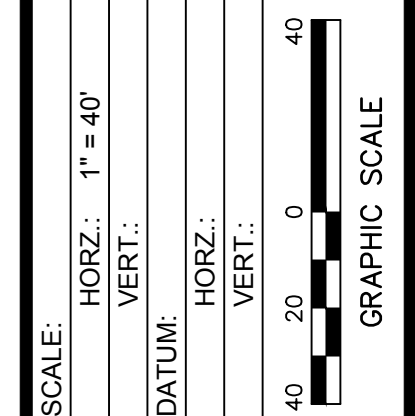
PAVEMENT

- CONSTRUCT ACCESSIBLE ROUTES, PARKING SPACES, RAMPS, SIDEWALKS AND WALKWAYS IN CONFORMANCE WITH THE FEDERAL AMERICANS WITH DISABILITIES ACT AND WITH MASSACHUSETTS ARCHITECTURAL ACCESS BOARD AND LOCAL LAWS AND REGULATIONS (WHICHEVER ARE MORE STRINGENT).

SITE RESTORATION

- PROVIDE 6 INCHES OF TOPSOIL AND SEED TO AREAS DISTURBED DURING CONSTRUCTION AND NOT DESIGNATED TO BE RESTORED WITH IMPERVIOUS SURFACES (BUILDINGS, PAVEMENTS, WALKS, ETC.) UNLESS OTHERWISE NOTED. REFER TO LANDSCAPE PLAN FOR SEED MIX.
- REPAIR DAMAGES RESULTING FROM CONSTRUCTION LOADS, AT NO ADDITIONAL COST TO OWNER.
- RESTORE AREAS DISTURBED BY CONSTRUCTION OPERATIONS OUT SIDE OF THE WORK AREA TO THEIR ORIGINAL CONDITION OR BETTER, AT NO ADDITIONAL COST TO OWNER.

No.	DATE	DESCRIPTION	DESIGNER	REVIEWER



FUSS & O'NEILL
 78 INTERSTATE DRIVE
 CONCORD, MASSACHUSETTS 01746
 413.452.0445
 www.fussandoneill.com

THE GRANTHAM GROUP, LLC.
 SITE LAYOUT PLAN
 CHRISTOPHER HEIGHTS ASSISTED
 LIVING FACILITY PROJECTS
 MASSACHUSETTS
 CONCORD

PROJ. No.: 20150485.A10
 DATE: 11/16/2016

C1.20

NOT FOR CONSTRUCTION



United States Department of the Interior



NATIONAL PARK SERVICE
Interior Region 1
North Atlantic-Appalachian
15 State Street, Boston, MA 02109
(Field Office: 54 Portsmouth Street, Concord, NH 03301)

IN REPLY REFER TO:

October 23, 2020

Jody Kablack, RHSO Specialist
Regional Housing Services Office
37 Knox Trail
Acton, MA 01720
(via: electronic transmission)

Re: Christopher Heights Assisted Living Facility Project Concord, MA

Dear Ms. Kablack:

The National Park Service (NPS) has reviewed the proposed Christopher Heights Assisted Living Facility Project (Project) for consistency with the Wild and Scenic Rivers Act. The US Department of Housing and Urban Development is providing funding for the construction of the Project which involves the construction of an 83-unit affordable assisted living facility with associated driveway, parking, drainage, grading, and utilities adjacent to the Assabet River in West Concord.

Twenty-nine miles of the Sudbury, Assabet, and Concord Rivers were designated into the National Wild and Scenic River System under Public Law 106-20 on April 9, 1999. The rivers were designated for their free-flowing condition, water quality and their outstandingly remarkable values (ORVs) including ecology, recreation, scenery, history and culture, and literature. These ORVs are described in detail in the *Sudbury, Assabet, and Concord Wild and Scenic River Study Report* (1996) and the *Sudbury, Assabet and Concord Wild and Scenic River Conservation Plan* (2019).

NPS has determined that the proposed Project would not have direct and adverse effects on the free-flowing condition, water quality, and outstandingly remarkable values for which the Sudbury, Assabet, and Concord Rivers were designated as components of the National Wild and Scenic Rivers System. There will be no in-stream work on the Assabet River or its adjacent tributary Nashoba Brook, therefore the project will not require an NPS review under Section 7 of the Wild and Scenic Rivers Act. The 6.68-acre area along the Assabet River and Nashoba Brook will be put into a permanent Conservation Restriction, providing an adequate riparian buffer to protect the wildlife, scenery, wetlands, and floodplain associated with the Assabet River.

Please notify the NPS of any proposed substantive changes to the Project, such as the plan set, special provisions, or construction methods, so that we can review such changes.

Thank you for the opportunity to review this project for consistency with the Wild and Scenic designation of the Sudbury, Assabet, and Concord Rivers. Please feel free to contact me if there are any questions regarding these comments, emma_lord@nps.gov.

Sincerely,

A handwritten signature in black ink that reads "Emma M. Lord". The signature is written in a cursive style with a large, stylized "E" and "L".

Emma Lord, Natural Resource Specialist
Partnership Wild and Scenic Rivers

Copy: Jamie Fosburgh, Branch Chief, Partnership Wild and Scenic Rivers
Anne Slugg, Chair, SuAsCo River Stewardship Council



January 9, 2020

Assisted Living Supply and Demand Study For: Christopher Heights of Concord, Concord, MA

PREPARED FOR: THE GRANTHAM GROUP, LLC



Façade Plan of Christopher Heights of Concord

Prepared by:

LYNNE D. SWEET, MANAGING MEMBER
KYRA SPOTTE-SMITH, MARKET ANALYST/PLANNER
617-454-1144

LDS CONSULTING GROUP, LLC
233 NEEDHAM STREET
NEWTON, MA 02464

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Executive Summary

Overview

The purpose of this study is to forecast supply and demand for the development of Christopher Heights of Concord, an 83-unit mixed income assisted living facility to be built at 6X Winthrop Street in West Concord, Massachusetts (the "Subject Property"). It is understood that this study will be used in The Grantham Group's application for financing to the Commonwealth of Massachusetts Department of Housing and Community Development and other funding agencies. This study follows the guidelines of the National Council of Affordable Housing Market Analysts (NCAHMA).

Project Summary

The Subject Property is located at the end of 6X Winthrop Street on a vacant 6-acre parcel of land in West Concord. The development will consist of one three-story building shown on the site plan prepared by Fuss & O'Neill and dated November 16, 2016, attached as *Exhibit 1*. Floor plans of the property are also attached as *Exhibit 1*. There will be seventy-one (71) studio/alcove apartments averaging 330 square feet and twelve (12) one-bedroom apartments averaging 525 square feet. All units will be age restricted to persons age 62 and older. The development will have 40 units priced at market, 17 units (20%) will be income restricted to extremely low-income residents earning less than 30% of the area median income ("AMI"), and 26 units will be income restricted to residents earning less than 60% of AMI. The 40 "market" units are income restricted to persons earning at or below 150% of AMI.

We have provided a chart below showing the general information for each unit type. Please note that the monthly fee figures include rent and service costs including personal care services up to 1.5 hours daily, 3 meals a day, weekly flat linen and housing keeping, scheduled transportation, and social activities. Christopher Heights does not charge an additional fee in the event that residents require extra personal care after the first 1.5 hours. Self-Administered Medication Management ("SAMM") is also included in the monthly fee for residents in the affordable units and is offered for an additional \$250/month for the market rate residents. The Subject Property will not offer Limited Medication Administration ("LMA"). All utilities are included in the base monthly fee, but tenants have to pay for their own telephone and cable, which Christopher Heights offers at a discounted rate of \$50/month. Christopher Heights charges a \$4,000 assessment and service plan implementation fee at move in for market rate residents only. Christopher Heights also charges a second occupant fee of \$2,000/month. Additionally, Christopher Heights charges \$7.50 per guest for guest meals.

Table 1

Proposed Monthly Fees and Unit Sizes				
Income Limit	# Bedrooms	# of Units	Unit Size	Monthly Fee
30% of AMI	Studio	14	330	\$2,325
30% of AMI	One	3	525	\$2,325
60% of AMI	Studio	23	330	\$3,255
60% of AMI	One	3	525	\$3,315
150% Market	Studio	34	330	\$4,400
150% Market	One	6	525	\$5,000
Total		83		

The building will have 55,000 square feet of residential living space and common area and 40 on-site surface parking spaces. The building will be three stories with a basement that includes mechanical space and a commercial kitchen and two elevators. The first floor will offer a pub, multi-purpose room, lobby, living room, beauty parlor/barber shop, reception area, executive and administrative offices, a conference room and residences. The second and third floors will have residences, a country kitchen, nurses' stations, multi-purpose room, office, laundry room, whirlpool tub room and storage. Approximately 45% of the space will be dedicated to the common areas described above.

The design will be built to the Stretch Energy Code and is targeting LEED certification that will dictate the use of sustainable materials and practices during construction. The design will include energy efficient building envelope and systems. All of the residential units are designed for assisted living for elderly and will be handicapped accessible. Five units will be fully ADA handicapped compliant. The units will have quality finishes and contain a galley kitchen with a microwave oven, kitchen sink, and refrigerators as well as individual bathrooms with the latest life-safety and emergency call systems. Units will be fully wired for telephone and cable. Floors will be carpeted. Additionally, the building will be pet-friendly, allowing small dogs and cats at no additional charge to residents.

Construction Schedule

If project funds are awarded in the Winter 2020 funding round, construction is expected to start in Fall 2020. First occupancy is expected in Fall 2021.

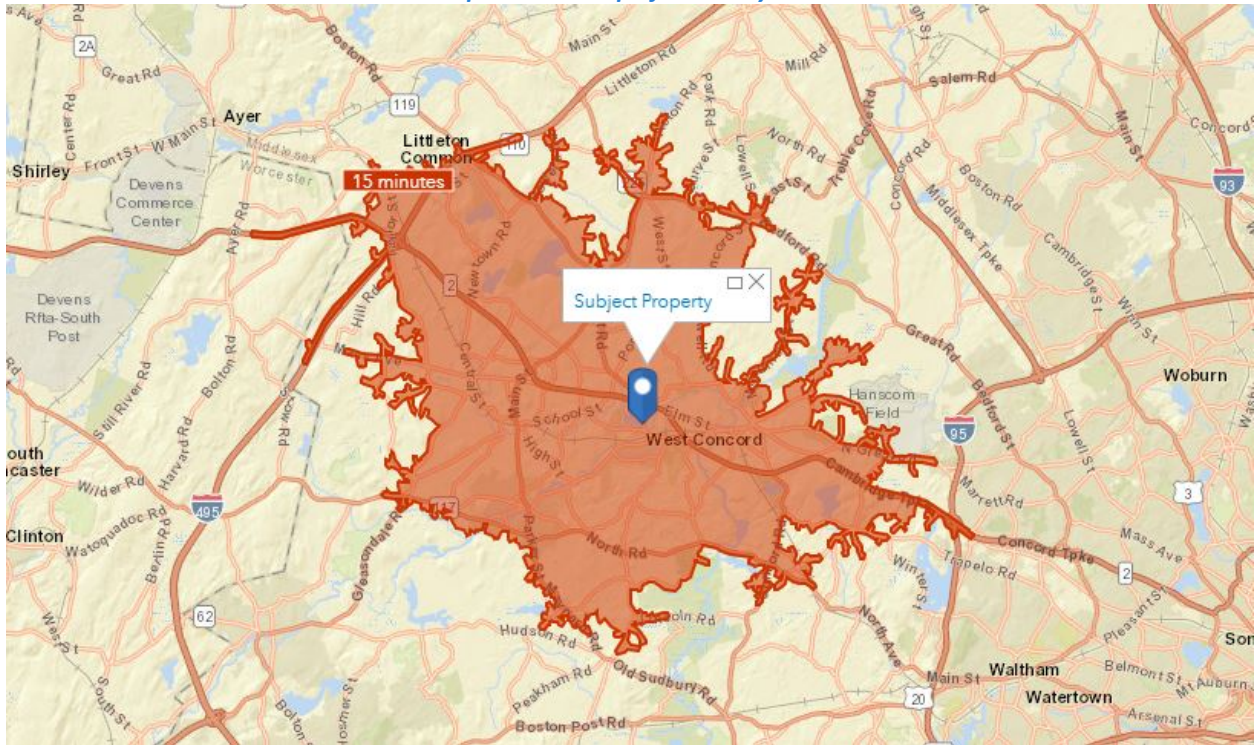
Methodology

The information in this study was compiled after reviewing demographic information, speaking with the present competition in the market, speaking to local officials, and reviewing project documentation. This report is reflective of the data, market conditions and conclusions considered at this point in time. The information furnished by others is believed to be reliable. However, no warranty is given for its accuracy.

For the purposes of this study, we defined the Study Area to be based on an area which is a 15-minute drive time from the Subject Property, which is outlined in red and shown on the map on the following page. We chose this drive time as most adult children will pick a facility for their parents that is between a 10 and 20-minute drive time from their home. Given the relatively low cost of the Subject Property and high quality, it is possible that persons will come from farther away.

We analyzed demographic data for the Study Area, which was obtained from the decennial census, the American Community Survey, and ESRI demographic projections, among other sources. Additionally, we examined employment data from the Massachusetts Executive Office for Labor and Workforce Development for Concord, Middlesex County, and the Commonwealth of Massachusetts.

Map 1 – ESRI Map of the Study Area



For our competitive analysis, we examined three assisted living facilities in the Study Area. Together, these developments are referred to as the “Competitive Facilities” and are listed in the chart below. For each facility, we looked at such factors as location, facility age, base pricing, community fees, a la carte pricing as well as occupancy, facility amenities, feeders to the facility and turnover rates.

Table 2: Competitive Facilities

Facility	Community
Benchmark at Robbins Brook	Acton
The Commons in Lincoln	Lincoln
Concord Park	Concord

We used Ribbon Demographics HISTA data reports to determine demand for the Study Area.

The the work for this study was performed December 2017-January 2020.

We have provided a summary of the sources utilized in this study at the end in a section titled “Other Matters.”

Definitions

Assisted Living Facilities

Since 1995 assisted living residences in Massachusetts have been regulated by Massachusetts General Laws Chapter 19D. Each facility is certified by the Executive Office of Elder Affairs prior to opening and recertified every other year. Assisted living is a special combination of housing, personalized supportive services and care designed to respond to the individual needs of those requiring help in activities of daily living, but not requiring the skilled medical care provided in a hospital or skilled nursing facility. Residences combine apartment-like living with a variety of supportive services, including three meals a day in a common dining room, housekeeping services, transportation, 24-hour security, on-site staff to respond to emergencies, emergency call systems, medication management, personal laundry services, social and recreational programs and assistance with ADLs such as eating, bathing, dressing, toileting and mobilizing, and instrumental activities of daily living (IADLs) such as shopping and laundry.

Assisted living residences monitor the well-being of their residents and can help coordinate health services by licensed outside agencies or providers, however, they do not provide skilled nursing services directly. The physical layout of assisted living residences includes studio, one- and two-bedroom apartments units with entry doors, private bathrooms and kitchenettes. As much as fifty percent of the facility is used for common areas including lobby/reception area, administrative offices, food service, dining room, activity areas, beauty salons/barbershops, cafes/bakeries, resident laundry, central laundry, storage spaces, maintenance area, loading/trash area, mechanical rooms, employee lounge and lockers, areas for linens and cleaning supplies and ancillary uses. Units are typically furnished with residents' belongings and furniture.

Residents entering an assisted living residence sign an annual residency contract, which is similar to a lease and agree to pay a monthly fee or rent that includes the cost of housing, meals and services and other amenities. Assisted living is considered to be need driven. Based on our experience, the typical customer for an assisted living facility is a one-person household that has experienced some type of crisis, either an illness or the loss of a spouse. They are no longer able to live totally independently and may need help with cooking, cleaning and/or bathing or toileting. The average assisted living customer is in their early to mid-80's, female and lives in an assisted living facility in Massachusetts an average of 2.1 years (Executive Office of Elder Affairs 2016).

Affordable Assisted Living

The following are rental sources that can be used to assist low income residents in affording assisted living:

PACE: Seniors with an annual income up to approximately 40% of AMI or \$24,000 a year are eligible for PACE.

GAFC: GAFC is a Massachusetts program that reimburses a provider for providing personal care services, 24-hour access to assistance, nursing, and social work oversight to Medicaid-

eligible individuals. The Department of Public Welfare, Division of Medical Assistance, in response to two major trends, created this program in 1991. The first was a change in nursing home admissions clinical criteria. The second was an emerging need for Medicaid to fund assistance with activities of daily living for frail individuals in the community who no longer qualified for nursing home placement. The program was modeled after the Adult Foster Care program in which an individual with at least one medical diagnosis and a need for assistance with daily personal care would move into the home of a care giving family. The GAFC program allows individuals requiring such care to continue to age in a place by offering services in a managed housing environment, while maintaining their independence, dignity and autonomy. GAFC services have evolved into Medicaid's assisted living services package. Providers of GAFC include certified home health agencies, licensed hospitals, home care corporations, assisted living facilities, community agencies, and housing organizations that are able to meet the program requirements. The reimbursement methodology includes two components. There is a daily rate per participant for personal care, and a monthly program administration rate per participant. The average rate is comprised of the caregiver rate and the administrative rate. Residents who are clinically eligible for GAFC may also be eligible for SSI-G. The base SSI payment, the supplement added by Section G plus the GAFC rate total approximately \$2,300 a month. It is important to note that in order to qualify for GAFC an individuals' income needs to be at poverty level, approximately \$14,340 a year, and have assets of \$2,000 or less. This typically leaves residents with only \$75 a month in spending money.

Conclusions

Site and Community

The Subject Property is located in the Town of Concord, an affluent community of 18,666 residents 20 miles west of downtown Boston. The Subject Property is located in West Concord in a neighborhood that has both residential and office/industrial uses. Currently, the Subject Property is an open field with trees. It is bounded by the new Bruce Freeman Rail Trail to the east, which connects pedestrians and bicyclists to the West Concord Commuter Rail Station nearby. The Subject Property is located at the end of Winthrop Street off Commonwealth Avenue and Route 2/Concord Turnpike. Commonwealth Avenue connects to Route 62/Main Street, along which many of West Concord's retail and commercial amenities are located. The Subject Property is a short drive from Emerson Hospital, The Harvard Vanguard Concord, Massachusetts General Hospital Radiology and Oncology, and a number of medical offices. It is also a short walk or drive to the West Concord MBTA station, which is on the Fitchburg Commuter Rail Line. Therefore, the Subject Property is a short drive to life's everyday amenities including retail, restaurants, banks, pharmacies, and a grocery store.

Demographics

The Study Area is characterized by persons with high education attainment, low unemployment, and high median income and net worth. The Study Area has a large and growing older population. In particular, the 75+ population is projected to grow by 41%, or 1,871 persons, between 2010 and 2022. Over this same time period, the 85+ population is projected to grow by 29%, or 433 households. In addition, the 45-64 year old population, the adult children of the senior population, comprises 35% of the overall population or 3,200 persons. These adult children are most often the decision makers with regard to choosing an assisted living facility for their parents. In the long term between 2010 and 2035, the 65 plus population in Concord is projected to grow by over 2,700 persons or 101%.

Median incomes in the Study Area and Massachusetts decline dramatically with age in both 2017 and 2022, as would be expected as individuals hit retirement age. In particular, 42% of households 75+ will earn \$50,000 or less, the target market for the Subject Property. Simultaneously 60% of all households 75 years and older had a net worth in excess of \$250,000. In addition, there are 654 individuals over 75 in the Study Area with an ambulatory, independent living, or hearing difficulty, who may be candidates for assisted living. Together, these demographics suggest that the Study Area has a population in need of assisted living and the means to pay for it.

Supply

The Concord Housing Authority ("CHA") manages 80 units of state subsidized elderly and disabled housing. All 80 units are occupied with wait times ranging from two years to ten years, depending on community of residence. There is a waitlist of 289 households for an elderly or

disabled unit. The CHA also administers 85 Section 8 mobile rental vouchers. The CHA utilizes the Section 8 mobile voucher centralized waiting list managed by Massachusetts National Organization of Housing and Redevelopment Officials (“MassNAHRO”). As of January 6, 2020, there were approximately 215,853 households on this centralized waiting list. As of December 20, 2018, an estimated 187 households had a local Concord preference. We did not identify any private subsidized rental senior housing in the Study Area.

The Study Area appears under-supplied for affordable assisted living, with only 166 units of traditional assisted living at three Competitive Facilities in the Study Area (the “Competitive Facilities”). Of the 166 units of traditional assisted living, 143 are priced at market rate and 23 are affordable. Of the 23 affordable units, six are either GAFC or have some other form of rental subsidy as defined by HUD, and 17 are self-pay at 60% of AMI. Unlike the Subject Property, which only offers traditional assisted living, all three Competitive Facilities offer a continuum of care including independent living, traditional assisted living, and memory care assisted living options. Additionally, The Commons in Lincoln has skilled nursing beds on site.

The Competitive Facilities have a 100% occupancy rate for traditional assisted living units. Benchmark at Robbins Brook reported a short waitlist of 3 to 4 households for one-bedroom traditional assisted living units. None of the Competitive Facilities were offering incentives or concessions. The occupancy rates for traditional assisted living are greater than the industry standard of 90% and point to a need for additional assisted living units.

All Competitive Facilities include a standard service and meal package in their monthly fee including transportation to doctors’ appointments, housekeeping, and social programming and activities. All of the traditional assisted living facilities include three daily meals.

The Subject Property 30%, 60%, and 150% monthly fees are well below the competition. *The average market rate monthly fees are \$6,122 for a studio unit and \$7,182 for a one-bedroom unit. The average market rate fees are between 88% and 117% higher than the Subject Property’s proposed 60% monthly fees and between 39% and 44% higher than the Subject Property’s proposed “market rate” monthly fees for households earning up to 150% of AMI, depending on bedroom size.*

The Subject Property also includes personal care in its base monthly fee, unlike the Competitive Facilities, which charge additional fees. The Competitive Facilities offer various personal care packages, which range in price from \$660 to \$3,450/month for traditional assisted living. In addition to the base monthly fee, all Competitive Facilities charge a one-time community fee which ranges from \$4,500 to \$6,000 for traditional assisted living units and the Subject Property only charges \$4,000. Concord Park charges a second occupant fee of \$1,400 and Benchmark at Robbins Brook and The Commons in Lincoln charge a second occupant fee of 25% of the base monthly fee (approximately \$1,163-\$1,838 depending on the unit type and property), both of which are lower than the Subject Property which charges a \$2,000 second occupant fee. Respite care ranges from \$300 per month for existing residents to \$350 per day, which is not offered at the Subject Property. None of the Competitive Facilities include Limited Medication Assistance

("LMA") in the monthly fee for traditional assisted living units. All of the Competitive Facilities offer LMA for an additional fee, ranging from \$510-\$900 per month for traditional assisted living. The Subject Property will not offer LMA.

We learned that Concord Park received a special permit to construct an additional 16 assisted living units as an expansion to the existing property, which would be competitive to the 60% and "market rate" units at the Subject Property.

Demand

Based on our analysis and conversations with management and service providers in the area, there is demand for the 83 traditional assisted living units at the Subject Property. We examined age, income, and ADL status to estimate the total qualified households for each income level (30%, 60%, and 150% of AMI). We then subtracted out the traditional assisted living units in the Study Area by income level. We have assumed that half of the total units at Benchmark at Robbins Brook and The Commons will be filled by residents from outside of the Study Area due to the fact that both facilities are on the edge of our 15-minute drive time zone.

We then applied a capture rate. This tells us of the number of income-qualified households, what percentage needs to be captured to fill your facility. Additionally, we assumed that 50% of residents would come from within the Study Area and that 50% of residents would come from outside of the Study Area to be close to their adult children. Based on our calculations, in 2022, the income restricted units at 30%, 60%, and 150% of AMI will have to capture 4%, 9%, and 11% of the qualified households, respectively. The capture rates for the 30% and 60% units are below the industry standard of 10%. The 100% occupancy of the Competitive Facilities and a 65 plus population, which is projected to continue growing through 2035 are additional indicators of demand. Additionally, the monthly fees at the Subject Property are significantly below those being charged at the Competitive Facilities and include services comparable or superior to those being charged at the Competitive Facilities.

Lease Up and Absorption

The main referral sources to assisted living are adult children, nearby hospitals, rehabilitation facilities, and existing senior housing facilities. There are very strong demand indicators with the growing adult child population, and lower than average capture rates for each income level. In addition, supply appears to be constrained. This is illustrated by long wait lists for public subsidized elderly housing, as well as the high occupancy rates for the traditional assisted living units at the Competitive Facilities and a lack of affordable assisted living.

There has been minimal construction of new assisted living facilities in the region recent years, and most of the assisted living facilities that have been built have been predominantly Memory Care assisted living. None of the new traditional assisted living facilities have an affordable component. Therefore, we have no on point absorption data to use for our analysis.

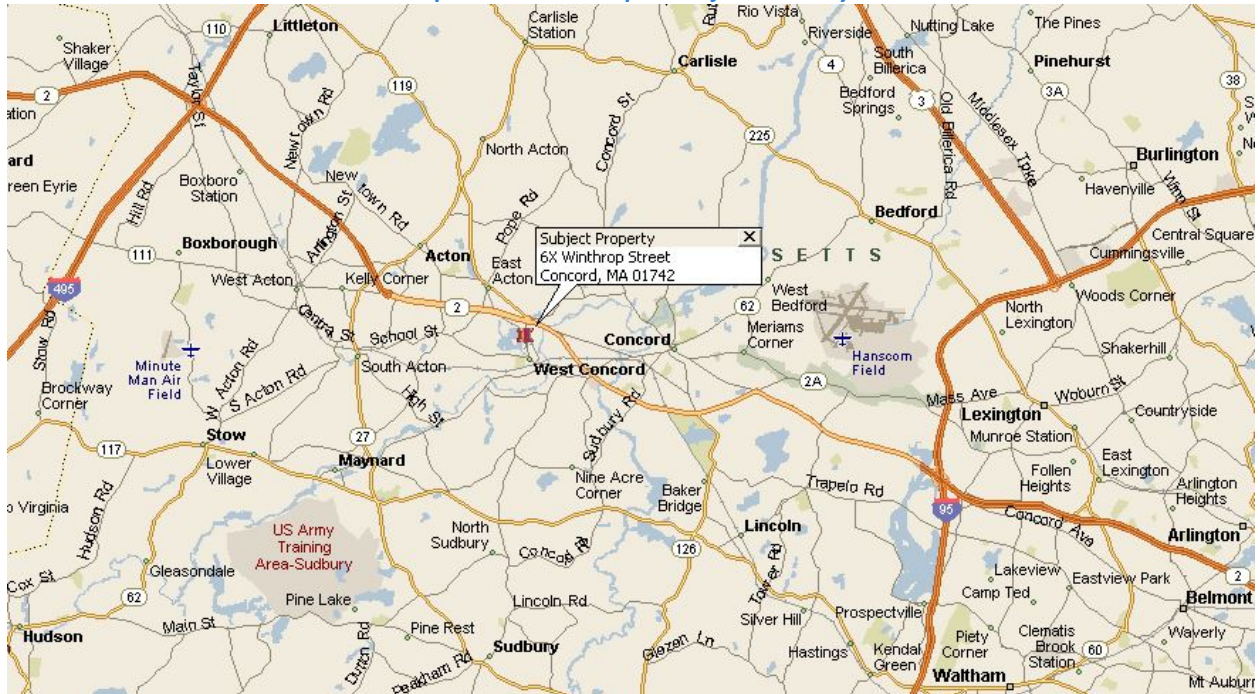
The Commons at Lincoln, which completed an expansion in 2016, is the only brand-new assisted living facility built or converted in the past five years in the Study Area. The Commons is the expansion of an existing 168-unit independent living facility campus to include a new construction 64-unit market rate assisted living facility, including 40 units of traditional assisted living, 24 units of Memory Care assisted living, and 32 skilled nursing beds. The Commons opened in April 2016 and leased an estimated 3-5 assisted living units per month, with all new assisted living units being absorbed within the property's first year of opening.

Additionally, Heywood Wakefield Commons in Gardner is a totally affordable assisted living facility with 78 units. It leased 5 units a month with a lease up of 15 months. Also, Linda Manor in Leeds opened in October 2014 and leased 8-10 units a month over its first six months.

Given the developer's strong track record of leasing up this type of facility and the relatively affordable price point as compared to the Competitive Properties, we believe that the Grantham's projection of five units leased at opening and 3-5 units leased per month is achievable.

Site and Community Description

Map 2— Location Map to Major Roadways



Community

The Town of Concord is a suburban community located in Middlesex County, 20 miles west of downtown Boston. Concord has a gross land area of approximately 25.9 square miles and had a population of 17,668 according to the 2010 Census, giving it a population density of roughly 682 persons per square mile. Concord borders the towns of Acton, Bedford, Carlisle, Lincoln, Maynard, and Sudbury. There has been little new development in the town in recent years.

On September 12, 1635, Concord was incorporated as the first inland settlement in Massachusetts. Later, on April 19, 1775, it was the site of the first battle of the American Revolutionary War, where the famous “shot heard ‘round the world” was fired.” Because of this historical event, Concord is considered to be the birthplace of the nation.

In addition to its significance in early American history, Concord was also home to many great literary and transcendental minds, including Ralph Waldo Emerson, Henry David Thoreau, Louisa May Alcott, Bronson, and Nathaniel Hawthorne. The town offers many historical and cultural sites within walking distance of Concord Center, including the Emerson House, Old North Bridge, Minuteman National Historical Park, and Sleepy Hollow Cemetery. Furthermore, Walden Pond, the inspiration of Thoreau’s *Walden* is located in Concord. Today, Walden Pond offers various outdoor recreation opportunities, including hiking trails (Town of Concord 2017).

Neighborhood and Site

The Subject Property will be located at end of 6X Winthrop Street, on the other side of the new Bruce Freeman Rail Trail in West Concord. Winthrop Street is located just off of Commonwealth Avenue and Route 2/Concord Turnpike and a short drive to Interstate 495 to the west and Interstate 95 to the east. Route 2 is a busy two-lane state turnpike. The most recent traffic volume count reported 45,131 vehicle trips per day at the intersection of Route 2 and Elm Place, approximately 0.7 miles from the Subject Property (MassDOT 2016).

Figure 1 – Aerial View of Subject Property (Outlined in Red)



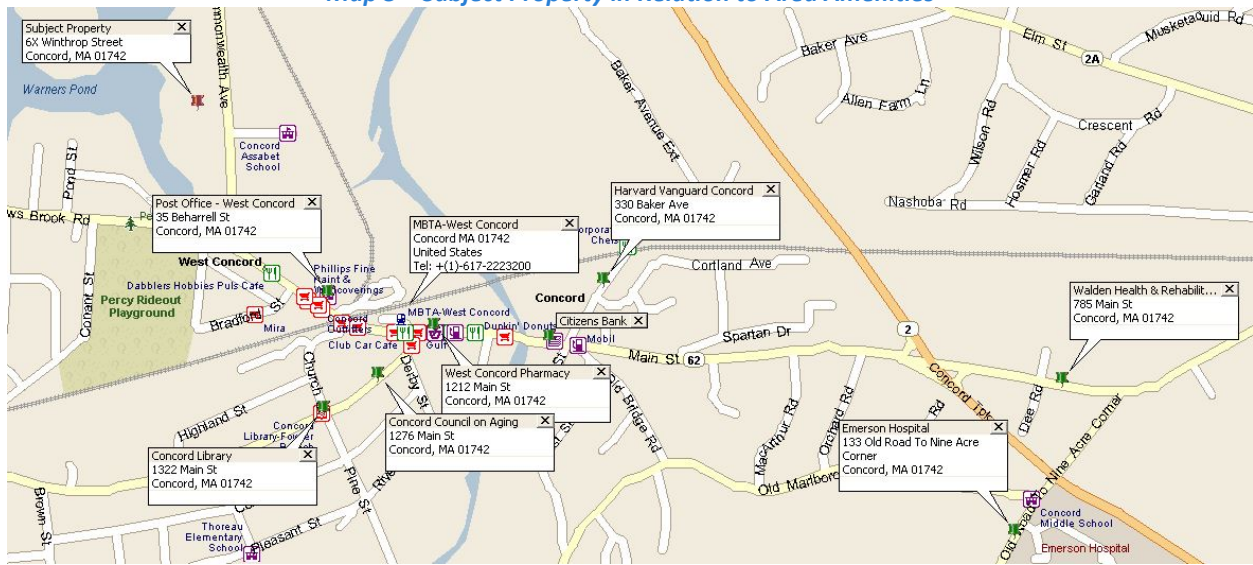
The Subject Property is currently an open field with a few trees. It is bounded by the new Bruce Freeman Rail Trail to the east, which connects pedestrians and bicyclists to the West Concord Commuter Rail Station nearby. Directly across the rail trail from the Subject Property on either side of Winthrop Street are two low rise office/industrial buildings. The rest of the surrounding neighborhood is primarily residential, characterized by single family homes.

The Subject Property is located equidistant to Concord Center and West Concord Center, which offer a variety of local retail, restaurants, and services. In particular, the Subject Property is a one-minute drive to Main Street in the heart of West Concord at the commuter rail station. This location has a variety of local shops, restaurants, and other commercial and retail amenities. Pictures of the Subject Property and surrounding neighborhood are attached as *Exhibit 2*.

General Area Amenities

In addition to the amenities discussed above, Route 62/Main Street boasts a number of retail and commercial amenities that are within a short drive of the Subject Property. As shown in the map below, these amenities include the Fowler Branch of the Concord free public Library, the West Concord Pharmacy, a post office, and a variety of shops, cafes, restaurants, gas stations, and banks. The map below summarizes the amenities in proximity to the Subject Property.

Map 3 – Subject Property in Relation to Area Amenities



Transportation

The Subject Property is approximately 0.5 miles or a one-minute drive to the West Concord Massachusetts Bay Transit Authority (“MBTA”) commuter rail station, which is located at Commonwealth Avenue and Route 62/Main Street in West Concord. This station is on the Fitchburg Commuter Rail Line and provides service outbound to Wachusett and inbound to Boston’s North Station (MBTA 2017).

The Concord Council on Aging, as further described below, provides weekly van service to medical appointments and special engagements in Concord, as well as to grocery shopping outside of Concord. Transportation services are available five days per week and must be scheduled in advance. According to CoA Program Supervisor Lauren Baretta, the CoA’s van services are in high demand, and the CoA provided over 6,000 rides in 2017. Typically, van

service is only available to seniors who are not currently residents at an assisted living facility due to high demand and the standard that assisted living facilities also provide transportation services. The CoA does not charge for transportation services but has a \$2 suggested donation.

Hospitals and Medical Offices

The site is located 1.2 miles southeast of the 150-bed Emerson Hospital, which has a cancer center and rehabilitation center providing both physical and occupational therapy. Additionally, The Harvard Vanguard Concord, Massachusetts General Hospital Radiology and Oncology, and the Concord Professional Center are all within a five-minute drive of the Subject Property. The Concord Professional Center has additional medical offices, including Concord-Lexington Oral Surgery, Walden Health & Rehabilitation Center, and Family Dermatology. There are many additional doctors' offices located near the hospital specializing in many different areas including gastrointestinal issues and gerontology.

Concord Council on Aging

The Concord Council on Aging ("CoA") and Senior Services is a community-based resource for residents of Concord ages 60 and over located at the Harvey Wheeler Community Center, approximately 0.6 miles southeast of the Subject Property on Route 62/Main Street in West Concord. It hosts a variety of social activities such as exercise classes; community education lectures and classes in topics such as art, history, music, and technology; a weekly catered luncheon; and discussion groups, outings to museums, restaurants, and other local attractions. Additionally, the Concord CoA's Wellness program offers several clinics, consultations, and health-specific educational programs, including weekly blood pressure screenings, a monthly diabetic clinic, monthly eye glass cleaning and adjustment, a monthly podiatry clinic, and a speaker series on relevant health topics. Furthermore, the Concord CoA provides a number of special and support services including the Meals on Wheels program, a gift shop, medical equipment for loan, lawyer resources, a caregivers' support group, and a bereavement and loss support group. In addition to the programs offered, the center also has a library and a computer lab. According to Concord CoA Program Supervisor Lauren Baretta, the CoA has 1,277 active seniors, of whom approximately 526 are receiving social services from the CoA. Per the CoA's policy, none of the seniors receiving social services are currently residents at assisted living facilities (Baretta 2018).

Education

The table below shows the educational attainment levels for the Study Area as compared to the Commonwealth of Massachusetts. The population 25 years and older in the Study Area is highly educated in comparison to Massachusetts, with over 39% having a graduate or professional degree, another 31% having a bachelor's degree, and just 3% just 3% having failed to complete high school (ESRI 2017).

Table 3 – Educational Attainment (2017)

	Study Area	Massachusetts
Population 25 years and over	49,333	4,790,993
Less than 9th grade	1.3%	4.4%
9th to 12th grade, no diploma	1.9%	5.1%
High school graduate (includes equivalency)	12.4%	25.1%
Some college, no degree	9.6%	15.9%
Associate's degree	5.1%	7.7%
Bachelor's degree	30.6%	23.2%
Graduate or professional degree	39.1%	18.7%

Employment

The table below shows employment by industrial category, according to the 2012-2016 ACS. In both Concord and the state, the largest industry category is “educational services, health care, and social assistance,” representing 28% of all jobs in both geographies. This is not surprising given the presence of Emerson Hospital, Harvard Vanguard Concord, and Massachusetts General Hospital Radiology and Oncology in Concord, as well as the town’s proximity to numerous educational and medical institutions in the Boston Metropolitan Area. The second most prominent industry category in Concord is the “Professional, scientific, and management, and administrative and waste management services,” which comprises nearly 25% of the total workforce.

Table 4 – Employment by Industry (2012-2016 ACS)

Industry	Concord		Massachusetts	
Civilian employed population 16 years and over	8,084	--	3,468,864	--
Agriculture, forestry, fishing and hunting, and mining	18	0.2%	14,110	0.4%
Construction	293	3.6%	189,560	5.5%
Manufacturing	721	8.9%	314,483	9.1%
Wholesale trade	83	1.0%	80,217	2.3%
Retail trade	496	6.1%	369,070	10.6%
Transportation and warehousing, and utilities	97	1.2%	126,224	3.6%
Information	362	4.5%	81,193	2.3%
Finance and insurance, and real estate and rental and leasing	804	9.9%	259,668	7.5%
Professional, scientific, and management, and administrative and waste management services	1,988	24.6%	464,486	13.4%
Educational services, and health care and social assistance	2,284	28.3%	973,361	28.1%
Arts, entertainment, and recreation, and accommodation and food services	471	5.8%	305,974	8.8%
Other services, except public administration	273	3.4%	153,463	4.4%
Public administration	194	2.4%	137,055	4.0%

The table below shows employment by occupational category, rather than industry. “Management, business, science and arts occupations” are by far the largest category in Concord, making up 75% of the total workforce, compared to 45% in Massachusetts. “Sales and office occupations” are the next largest category at 13%; however, this category is much less prevalent than the statewide level (ACS 2012-2016).

Table 5 – Employment by Occupation (2012-2016 ACS)

Occupation	Concord		Massachusetts	
Civilian employed population 16 years and over	8,084	--	3,468,864	--
Management, business, science, and arts occupations	6,051	74.9%	1,549,117	44.7%
Service occupations	497	6.1%	612,815	17.7%
Sales and office occupations	1,019	12.6%	768,471	22.2%
Natural resources, construction, and maintenance occupations	329	4.1%	237,241	6.8%
Production, transportation, and material moving occupations	188	2.3%	301,220	8.7%

The table below shows the top four employers in Concord, which includes all those with over 250 employees (MA EOLWD 2018). The largest employer is Emerson Hospital, which employs between 1,000 and 4,999 people. The second largest employer, Concord Personnel, is a city government executive office, and the other two top employers are in the Continuing Care Retirement Community (“CCRC”)/residential care fields. Emerson Hospital, Deaconess Abundant Life Community, and The New England Deaconess Association are all within a ten-minute drive from the Subject Property.

Table 6 – Top Employers in Concord – 250+ Employees

Company Name	Address	City	State	Number of employees	NAICS Code
Emerson Hospital	Old Road To 9 Acre Cor	Concord	MA	1,000-4,999	6221
Concord Personnel	Monument Sq	Concord	MA	500-999	9211
Deaconess Abundant Life Community	Deaconess Rd	Concord	MA	250-499	6233
New England Deaconess Association	Newbury Ct	Concord	MA	250-499	6239

Unemployment

Concord is characterized by low unemployment, similar to Middlesex County and lower than Massachusetts. Over the most recent 13-month period both Concord and Middlesex County averaged just 2.2% unemployment, below the Massachusetts average of 2.9%. Additionally, Concord’s unemployment has remained under 2.7% in every one of the last 13 months. As the graph below shows, the month-by-month changes in unemployment in Middlesex County and Concord closely track those of the Commonwealth of Massachusetts, albeit at lower levels (MA EOLWD 2018).

Figure 2

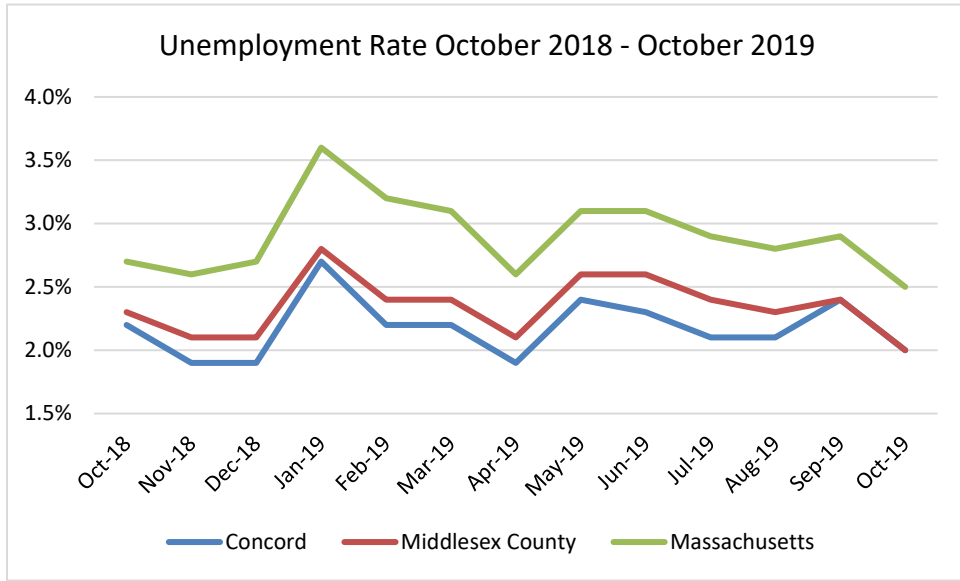


Table 7 - Unemployment Rate - Most Recent 13 Months

	Concord	Middlesex County	Massachusetts
Oct-19	2.0%	2.0%	2.5%
Sep-19	2.4%	2.4%	2.9%
Aug-19	2.1%	2.3%	2.8%
Jul-19	2.1%	2.4%	2.9%
Jun-19	2.3%	2.6%	3.1%
May-19	2.4%	2.6%	3.1%
Apr-19	1.9%	2.1%	2.6%
Mar-19	2.2%	2.4%	3.1%
Feb-19	2.2%	2.4%	3.2%
Jan-19	2.7%	2.8%	3.6%
Dec-18	1.9%	2.1%	2.7%
Nov-18	1.9%	2.1%	2.6%
Oct-18	2.2%	2.3%	2.7%
13-month Average	2.2%	2.3%	2.9%

Demographics in the Study Area

Population and Household Growth

The table below shows the changes in the Study Area's population from 2000 to 2010 and projected to 2022. Between 2000 and 2010, the total population in the Study Area increased by 4.2% or 2,699 people, while the number of households increased at a faster pace, by 6.7% or 1,561 households. This implies a decrease in average household size. However, population growth has increased in the last seven years and is projected to exceed household growth from 2010 to 2022. By 2022, the Study Area is projected to be home to 73,785 people and 27,184 households (ESRI 2017, ESRI 2017).

Table 8 – Study Area Population and Household Growth, 2010-2022

	2000	2010	2000-2010 Change		2017 Estimate	2022 Projection	2010 - 2022 Change	
			#	%			#	%
Population	63,753	66,452	2,699	4.2%	70,691	73,785	7,333	11.0%
Households	23,280	24,841	1,561	6.7%	26,106	27,184	2,343	9.4%

The table and chart below show the Study Area population by age in 2010, estimated to 2017, and projected to 2022. The greatest growth is projected to be among young adults (20-34) and seniors 65 years and older. **Simultaneously, one portion of the adult children population (ages 55-64) is projected to tremendous growth, increasing by 35%, or nearly 3,200 persons.** As the baby boomer generation ages into retirement, all age groups over 65 are projected to see double-digit growth rates, with those age 65-74 growing by 82% between 2010 and 2022. **The 75+ population, which is the target market for the Subject Property, is projected to grow by 41%, or 1,871 persons between 2010 and 2022. Most importantly, the 85+ population is expected to grow by 29%, or 433 persons (ESRI 2017).**

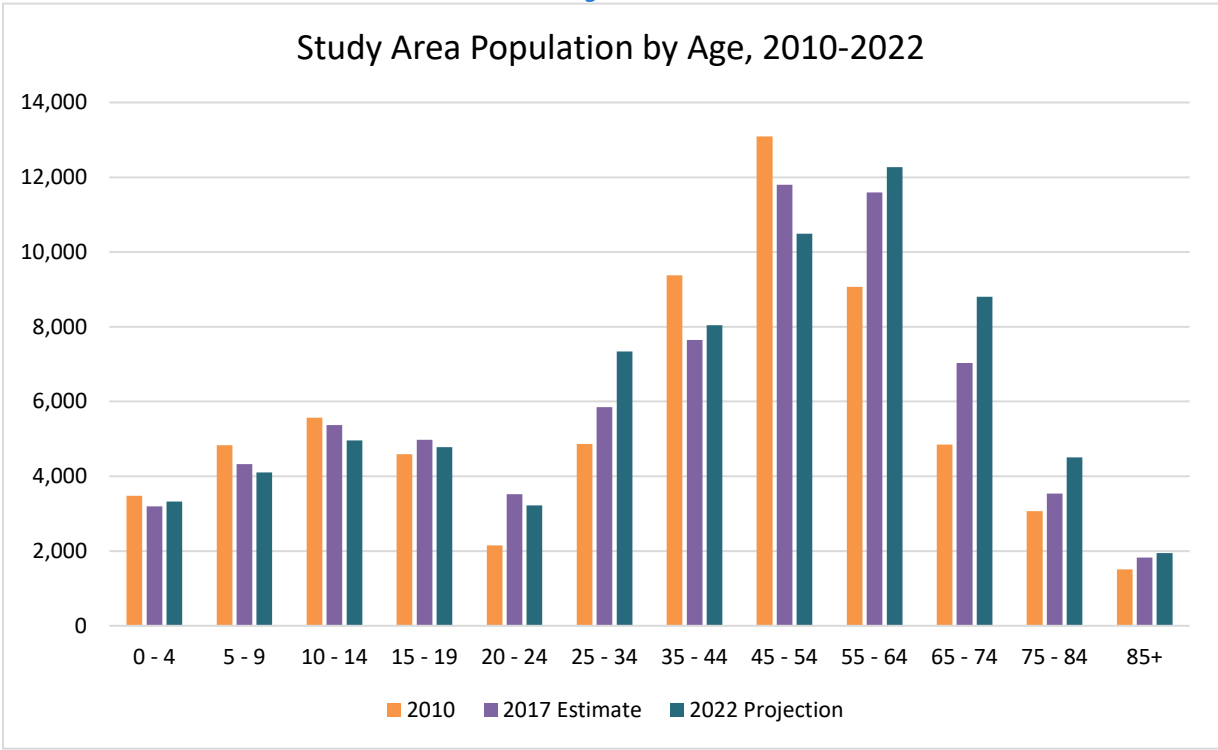
Table 9 – Study Area Population Growth by Age, 2010-2022

	2010		2017 Estimate		2022 Projection		2010-2022 Change	
	#	%	#	%	#	%	#	%
Total Population	66,449	--	70,691	--	73,783	--	7,334	11%
0 - 4	3,477	5%	3,196	5%	3,326	5%	-151	-4%
5 - 9	4,835	7%	4,326	6%	4,102	6%	-733	-15%
10 - 14	5,566	8%	5,374	8%	4,957	7%	-609	-11%
15 - 19	4,590	7%	4,980	7%	4,782	6%	192	4%
20 - 24	2,149	3%	3,525	5%	3,222	4%	1,073	50%
25 - 34	4,867	7%	5,852	8%	7,338	10%	2,471	51%
35 - 44	9,373	14%	7,649	11%	8,044	11%	-1,329	-14%
45 - 54	13,096	20%	11,802	17%	10,489	14%	-2,607	-20%
55 - 64	9,072	14%	11,598	16%	12,270	17%	3,198	35%
65 - 74	4,844	7%	7,030	10%	8,802	12%	3,958	82%

	2010		2017 Estimate		2022 Projection		2010-2022 Change	
	#	%	#	%	#	%	#	%
75 - 84	3,070	5%	3,537	5%	4,508	6%	1,438	47%
85+	1,510	2%	1,822	3%	1,943	3%	433	29%
45 - 64	22,168	33%	23,400	33%	22,759	31%	591	3%
65+	9,424	14%	12,389	18%	15,253	21%	5,829	62%
75+	4,580	7%	5,359	8%	6,451	9%	1,871	41%

The chart below displays the same population growth data as the table above, making clear the rapid growth in the 75+ age cohorts.

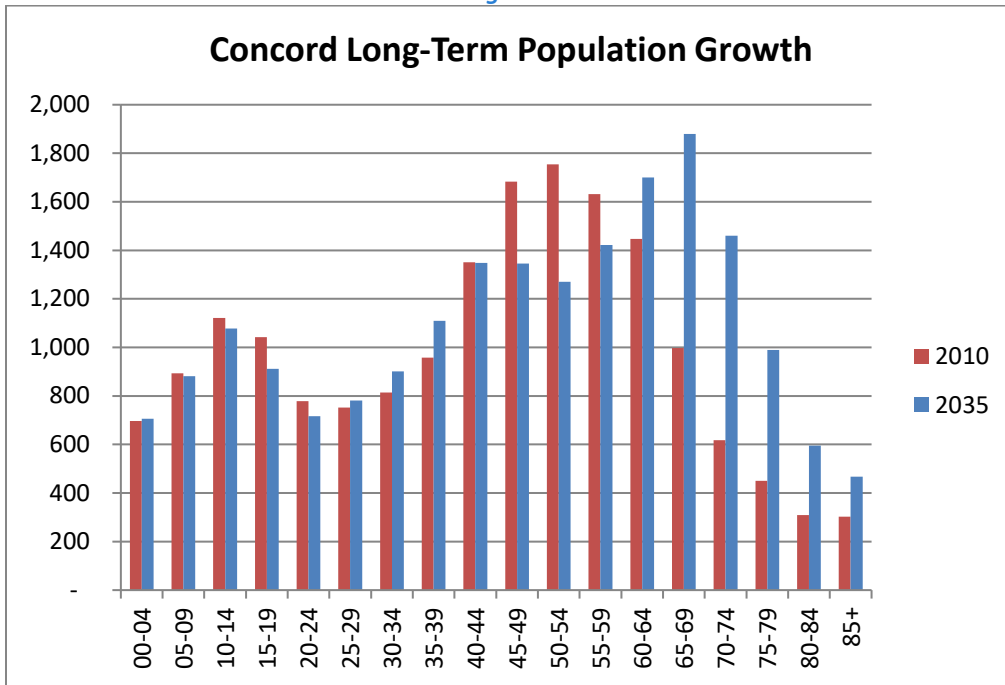
Figure 3



Long-Term Population Projection

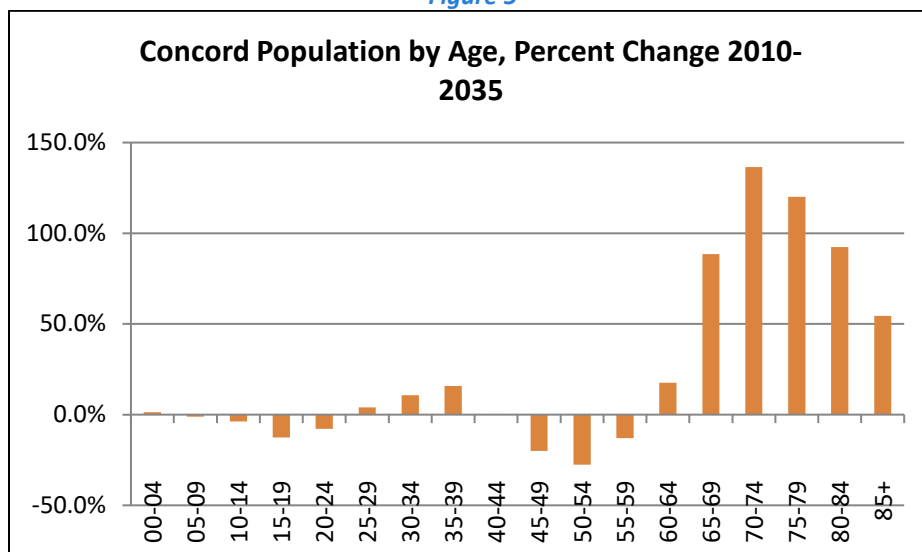
The Metropolitan Area Planning Council (“MAPC”) has projected long-term population growth for the Town of Concord. The chart below compares the 2010 census population to MAPC’s 2035 projections by age group (Metropolitan Area Planning Council 2010).

Figure 4



According to the 2010 Census, the 65+ population is projected to grow significantly by 2035, from 2,677 in 2010 to 5,393 in 2035. The 65+ age group constituted 15% of the population in 2010 and is projected to constitute 28% of the population in 2035. Similarly, the 75-84 population is anticipated to grow significantly by 2035, from 760 in 2010 to 1,586 in 2035. The 75-84 age group constituted 4% of the population in 2010 and is projected to constitute 8% of the population in 2035. *The 85+ population, the target market for assisted living, is projected to grow by 55% between 2010 and 2035, from 303 persons in 2010 to 468 persons in 2035.* The following chart shows the change in population in Concord by age group from 2010 to 2035.

Figure 5



This chart shows that the population over the age of 65 is expected to grow significantly between 2010 and 2035, with those ages 65-74 and 75-84 more than doubling in size during this time. All other age groups are expected to decrease in size or remain stagnant when compared to the levels in 2010.

Housing Tenure

The proportion of households that are owner-occupied in the Study Area (77%) is substantially higher than that of Massachusetts (60%). Still, an estimated 6,042 households in the Study Area are renter-occupied, or 23% of the total (ESRI 2017).

Table 10 – Housing Tenure, 2017

	Study Area		Massachusetts	
	#	%	#	%
Occupied Housing Units	26,106	--	2,652,580	--
Owner-Occupied	20,064	76.9%	1,599,323	60.3%
Renter-Occupied	6,042	23.1%	1,053,257	39.7%

The table on the next page also examines housing tenure, but exclusively for households over age 55. According to the 2010 U.S. Census, 19% of all senior households in the Study Area are renters. That share generally increases with age, however, as 25% of households age 75 to 84 are renters and 39% of those 85 and over rent. Given the large growth in the older senior population that has already occurred since the 2010 census and is projected in the coming years, there are likely to be many more senior households in the Study Area looking to rent (ESRI 2017).

Table 11 – Housing Tenure by Age, 2010 Census

	Total	Renter Households	
	Households	Number	Percent
All 55+ Householders	11,167	2,092	18.7%
Householder 55 to 64 years	5,280	761	14.4%
Householder 65 to 74 years	2,920	460	15.8%
Householder 75 to 84 years	2,001	493	24.6%
Householder 85+	966	378	39.1%

Age of Housing Stock

The table below shows the estimated period in which each of the housing units in Concord and Massachusetts were built, according to the 2012-2016 ACS. Concord's housing stock is somewhat newer than that of Massachusetts, with only 24% of Concord units-built pre-World War II, compared to 34% statewide. The 1970's was a particularly significant decade for Concord's development, accounting for 14% of all current units, or over 1,050 in total. However, in both Concord and in Massachusetts, housing unit growth has slowed significantly since 1999 (ACS 2012-2016).

Table 12 – Age of Housing Stock

	Concord		Massachusetts	
	#	%	#	%
Total Housing Units	7,327	--	2,836,658	--
Built 2014 or later	11	0.2%	6,965	0.2%
Built 2010 to 2013	373	5.1%	33,222	1.2%
Built 2000 to 2009	567	7.7%	210,412	7.4%
Built 1990 to 1999	839	11.5%	213,879	7.5%
Built 1980 to 1989	427	5.8%	305,588	10.8%
Built 1970 to 1979	1,054	14.4%	331,248	11.7%
Built 1960 to 1969	888	12.1%	290,505	10.2%
Built 1950 to 1959	1,155	15.8%	324,485	11.4%
Built 1940 to 1949	254	3.5%	165,024	5.8%
Built 1939 or earlier	1,759	24.0%	955,330	33.7%
Median Year Structure Built	1966		1959	

Number of Persons per Household

The table below shows the distribution of households by household size, broken down into both renters and homeowners. Study Area households are larger than the Massachusetts average, with approximately 45% including three or more people, as compared to 39% statewide. However, renter households in the Study Area are smaller than the average renter household in Massachusetts; approximately 51% of Study Area renter households consist of just one person, compared to 41% in Massachusetts (ESRI 2017).

Table 13 – Persons per Household, 2010

	Study Area			Massachusetts		
	Total	Owner	Renter	Total	Owner	Renter
Total Households	24,858	19,516	5,342	2,547,075	1,587,158	959,917
1-Person	24.0%	16.8%	50.5%	28.7%	21.3%	41.1%
2-Person	31.3%	32.8%	25.8%	31.9%	34.5%	27.7%
3-Person	17.3%	18.8%	12.0%	16.4%	17.4%	14.7%
4-Person	18.5%	21.3%	8.3%	13.9%	16.5%	9.6%
5+ Person	8.9%	10.4%	3.4%	9.1%	10.4%	6.9%

Income

The table below shows estimates for median household income in 2017 and projected median household income in 2022, according to ESRI reports. Concord is a high-income community with an estimated 2017 median household income of \$121,418, which is significantly higher than the median household income in Massachusetts (\$71,460). Between 2017 and 2022, the median household income in the Study Area is expected to increase by \$10,860, or 8.6%. This is

a lower expected growth rate compared to the median income in Massachusetts, which is expected to increase by 12% over the same time period (ESRI 2017).

Table 14 – Median Household Income, 2017-2022

	Study Area	Massachusetts
2017	\$121,418	\$71,460
2022	\$132,278	\$79,743
Change	\$10,860	\$8,283
% Change	8.9%	11.6%

The tables below show the distributions of senior households in the Study Area and Massachusetts by median household income and age bracket. We included ESRI estimates for 2017, as well as projections for 2022. The data illustrates two important points about the Study Area: the generally high income levels, and the rapid decline in household income with age. More than 2,500 households, or approximately 39% of all households ages 55-64 in the Study Area, are projected to earn over \$200,000 per year in 2022. Among households 75 and older, however, only 11% of households will earn \$200,000 or more in 2022 (ESRI 2017). Median incomes in the Study Area and Massachusetts decline dramatically with age in both 2017 and 2022, as would be expected as individuals hit retirement age. In particular, 42% of the 75+ population will earn \$50,000 or less, the target market for the Subject Property.

Table 15 – Study Area Household Income by Age (2017-2022)

	2017					
	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Total Households	6,529	--	4,087	--	3,362	--
<\$15,000	322	4.9%	208	5.1%	434	12.9%
\$15,000-\$24,999	211	3.2%	255	6.2%	393	11.7%
\$25,000-\$34,999	179	2.7%	172	4.2%	317	9.4%
\$35,000-\$49,999	279	4.3%	262	6.4%	374	11.1%
\$50,000-\$74,999	512	7.8%	521	12.7%	668	19.9%
\$75,000-\$99,999	630	9.6%	592	14.5%	257	7.6%
\$100,000-\$149,999	1,180	18.1%	749	18.3%	347	10.3%
\$150,000-\$199,999	932	14.3%	468	11.5%	191	5.7%
\$200,000+	2,284	35.0%	861	21.1%	381	11.3%
Median Income	\$147,115		\$101,508		\$54,350	

2022						
	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Total Households	6,651	--	4,087	--	3,362	--
<\$15,000	303	4.6%	208	5.1%	434	12.9%
\$15,000-\$24,999	180	2.7%	255	6.2%	393	11.7%
\$25,000-\$34,999	151	2.3%	172	4.2%	317	9.4%
\$35,000-\$49,999	229	3.4%	262	6.4%	374	11.1%
\$50,000-\$74,999	414	6.2%	521	12.7%	668	19.9%
\$75,000-\$99,999	575	8.6%	592	14.5%	257	7.6%
\$100,000-\$149,999	1,209	18.2%	749	18.3%	347	10.3%
\$150,000-\$199,999	1,019	15.3%	468	11.5%	191	5.7%
\$200,000+	2,569	38.6%	861	21.1%	381	11.3%
Median Income	\$160,183		\$112,373		\$57,671	

Table 16 – Massachusetts Household Income by Age (2017-2022)

2017						
	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Total Households	537,323	--	387,998	--	311,155	--
<\$15,000	56,523	10.5%	41,173	10.6%	60,324	19.4%
\$15,000-\$24,999	32,486	6.0%	37,033	9.5%	52,124	16.8%
\$25,000-\$34,999	32,659	6.1%	32,561	8.4%	39,820	12.8%
\$35,000-\$49,999	44,546	8.3%	42,904	11.1%	45,643	14.7%
\$50,000-\$74,999	75,058	14.0%	67,598	17.4%	48,275	15.5%
\$75,000-\$99,999	64,256	12.0%	48,519	12.5%	22,759	7.3%
\$100,000-\$149,999	105,234	19.6%	58,912	15.2%	22,511	7.2%
\$150,000-\$199,999	53,029	9.9%	26,350	6.8%	7,839	2.5%
\$200,000+	73,532	13.7%	32,948	8.5%	11,860	3.8%
Median Income	\$84,068		\$62,616		\$35,785	

2022						
	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Total Households	538,201	--	443,491	--	351,656	--
<\$15,000	54,308	10.1%	46,280	10.4%	68,548	19.5%
\$15,000-\$24,999	29,276	5.4%	39,157	8.8%	57,666	16.4%
\$25,000-\$34,999	28,443	5.3%	34,361	7.7%	42,171	12.0%
\$35,000-\$49,999	38,380	7.1%	44,686	10.1%	48,696	13.8%
\$50,000-\$74,999	63,034	11.7%	66,809	15.1%	48,285	13.7%
\$75,000-\$99,999	61,075	11.3%	53,925	12.2%	26,257	7.5%
\$100,000-\$149,999	114,893	21.3%	74,690	16.8%	30,891	8.8%
\$150,000-\$199,999	63,370	11.8%	36,788	8.3%	11,649	3.3%
\$200,000+	85,422	15.9%	46,795	10.6%	17,493	5.0%
Median Income	\$97,232		\$70,266		\$36,717	

Net Worth

The table below shows the 2017 net worth for households over age 55 in the Study Area and indicates significant financial reserves for many households that can be used toward the cost of assisted living. The median net worth among all age groups is over \$250,000, though more precise estimates are unavailable due to the ESRI sampling limitations discussed previously. Just under 75% of all households ages 55-74 have a net worth in excess of \$250,000, as do approximately 60% of all households ages 75 years and older. The mean net worth shows more variation, with households ages 65-74 averaging a net worth of \$2.56 million, compared to \$1.4 million for households 75 and older (ESRI 2017). **This illustrates that even though a household over age 75 may have a relatively low income as compared to younger persons, they may have substantial net worth by way of savings and home equity available to pay for the cost of living in an assisted living facility, especially a facility that is income restricted at multiple levels of AMI and therefore priced below the market rate.**

Table 17 – Study Area Net Worth by Age, 2017

	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Total Households	6,533	--	4,090	--	3,364	--
<\$15,000	589	9.0%	221	5.4%	364	10.8%
\$15,000-\$34,999	132	2.0%	40	1.0%	93	2.8%
\$35,000-\$49,999	103	1.6%	53	1.3%	41	1.2%
\$50,000-\$99,999	260	4.0%	197	4.8%	252	7.5%
\$100,000-\$149,999	248	3.8%	249	6.1%	238	7.1%
\$150,000-\$249,999	420	6.4%	303	7.4%	371	11.0%
\$250,000+	4,782	73.2%	3,028	74.0%	2,006	59.6%

	55 - 64		65 - 74		75+	
	#	%	#	%	#	%
Median Net Worth	\$250,001		\$250,001		\$250,001	
Average Net Worth	\$2,215,650		\$2,556,615		\$1,397,856	

Rent Burden

According to the U.S. Department of Housing and Urban Development, a household is defined as rent burdened if its housing costs exceed 30% of household income, and severely rent burdened if housing costs exceed 50% of household income. **Over 41% of residents in the Study Area are rent burdened, and 26% are severely rent burdened.** This means that there is a total of 2,197 renter households in the Study Area that are suffering from financial strain due to high housing costs and/or low incomes (ESRI 2019).

Table 18 – Rent Burdened Households

	Study Area		Massachusetts	
	#	%	#	%
Total Renter Households	5,588	--	966,054	--
Rent Burdened (>30%)	2,411	43.1%	461,754	47.8%
Severely Rent Burdened (>50%)	1,432	25.6%	233,061	24.1%
Not computed	328	5.9%	53,384	5.5%

Disability Status

The 2013-2017 ACS estimates in the table below show that as the population in Concord age from 65-74 to over 75, the percentage of those with a disability significantly increases. The most prevalent disabilities for the age 75+ population are ambulatory, independent living, and hearing difficulties. Persons over age 75 with these disabilities are candidates for assisted living, and there are 654 such individuals in Concord (ACS 2013-2017). Note that in this table, the percentages total to more than 100% of the total persons with a disability. This is because one person may have more than one disability.

Table 19 - Concord Disability Status of 65+ Population – 2012-2016 ACS

Concord Town Disability Status of 65+ Population - 2013 - 2017 ACS				
	65 - 74		75+	
	#	%	#	%
Total Population	1,780	--	1,751	--
With one or more disabilities (total)	171	9.6%	654	37.4%
With a hearing difficulty	139	7.8%	439	25.1%
With a vision difficulty	0	0.0%	85	4.9%
With a cognitive difficulty	4	0.2%	109	6.2%
With an ambulatory difficulty	32	1.8%	304	17.4%

With a self-care difficulty	16	0.9%	126	7.2%
With an independent living difficulty	19	1.1%	299	17.1%

Supply Analysis

The evaluation of a potential project requires an analysis of the current and planned housing and senior housing within the Study Area. It also requires an understanding of the different types of housing and senior housing services that are available in the Study Area. This section discusses the competitive environment that presently exists and involves a discussion of the different types of housing and senior housing that make up the inventory of housing in the Study Area. Providers were analyzed with regard to location, product type, unit size, inventory, census, rates, amenities and services. Determining and cataloging the aforementioned information is critical to understanding the market's level of sophistication. Understanding the market's level of sophistication and the products in the market (or lack thereof) provides significant insight as to potential opportunities and service saturation levels. We have looked at independent housing as a feeder to assisted living.

Research has shown that the choice to move to assisted living is based primarily on proximity to a potential resident's community and their adult children.

This section discusses the competitive environment that presently exists in the market for traditional assisted living. Providers were analyzed with regard to location, facility age, unit size, product type, base pricing, community fees, a la carte pricing as well as occupancy and facility amenities.

Housing Authorities

Housing authorities provide subsidized housing for seniors. We have provided a brief description of the housing authority programs available to seniors:

State Public Senior Housing

State public housing falls under Chapter 667 of the Massachusetts General Laws. State-aided public housing generally refers to projects built with 100% State funding (i.e., construction grants or by payments to the local housing authority to cover debt service). There are some units where HUD has effectively paid for construction through annual payments to cover debt service and some operating costs through the Section 8 programs. Developments are restricted to households with a member age 62 or older and up to 13.5% of the units in a development are available to individuals with disabilities at any age. Admission to State public housing is limited to households with net incomes below 80% of area median income. In reality, tenant incomes tend to be far lower than the maximum allowed. There are no asset limits and no citizenship or residency requirements. The rent a tenant pays is based on household income and whether the costs of any basic utilities (electricity, heat, cooking fuel) are included in the rent. Currently tenants pay:

- 30% of net income for rent if their rent includes any (though not necessarily all) of the basic utilities;
- 25% of net income for rent if local housing authorities pay for none of the basic utilities (i.e. tenants pay their electric, heat and cooking fuels directly).

Deficits occur because rents are set at a percentage of tenant income and thus do not always cover operating costs. The Massachusetts Department of Housing and Community Development (DHCD) currently provides operating subsidies for State public housing and also provides funds for service coordinators to assist tenants (DHCD).

Federal Public Senior Housing

Federal public housing refers to public housing built with 100% federal (HUD) funds. These projects are subject to federal regulations and receive annual operating subsidies from HUD as well as modernization funds for capital and management improvements as projects age. Under current law, 75%-85% of new openings must go to households earning less than 50% of median income, with the balance limited to households earning no more than 80% of median. The tenant generally pays 30% of adjusted income for rent in their first year.

Section 8 Mobile Voucher Program

The Section 8 Mobile Voucher program is a federal program that assists very low-income families, the elderly and the disabled afford decent, safe, and sanitary housing in the private market. The participant is free to choose any housing that meets the requirements of the program and is not limited to units located in subsidized housing projects. The tenant generally pays 30% of adjusted income for rent in their first year.

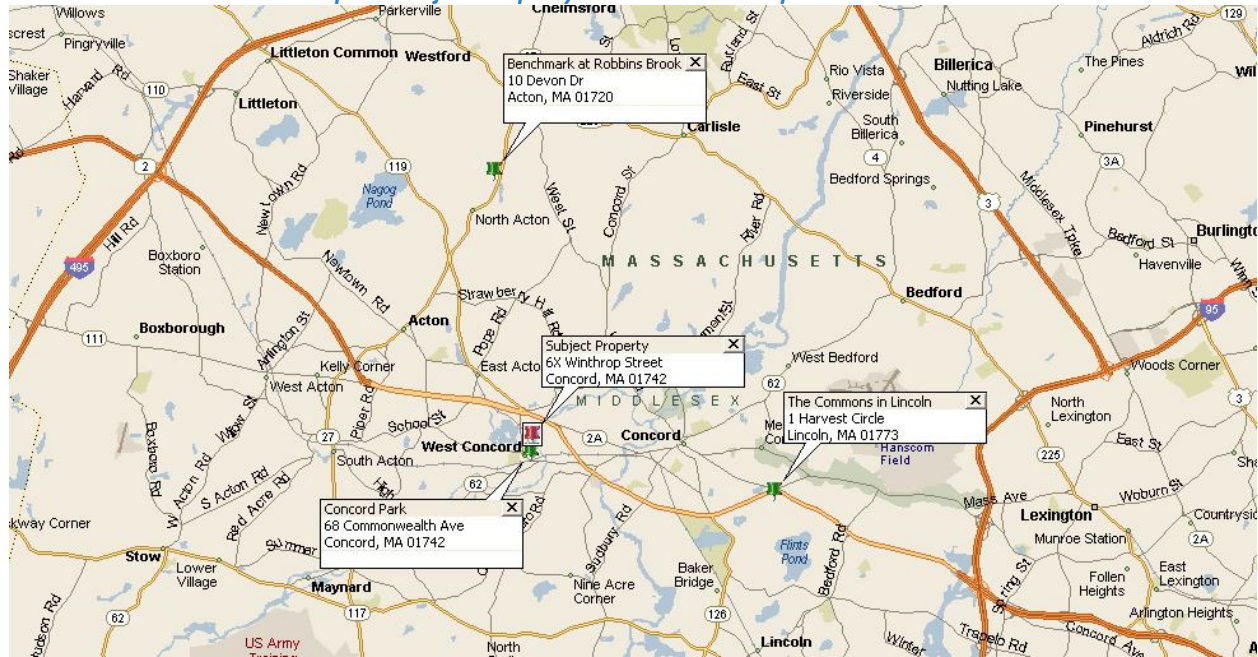
We contacted the Concord Housing Authority (“CHA”), which manages 80 units of state subsidized public elderly and disabled housing, including seven handicapped accessible units. These 80 units are fully occupied with wait times ranging from 2 or more years for a Concord resident and 8-10 years for a non-Concord resident. There are 289 households on the elderly and disabled waitlist (Nelson 2020).

Additionally, the housing authority administers 85 Section 8 mobile rental vouchers (LoVuolo 2017). The CHA utilizes the Section 8 mobile voucher centralized waiting list managed by MassNAHRO. As of January 6, 2020 there were approximately 215,853 households on this centralized waiting list. As of December 20, 2018, **an estimated 187 households had a local Concord preference** (Massachusetts Chapter of the National Association of Housing & Redevelopment Officials 2018, Brown 2017, MANAHRO 2020).

Summary of Assisted Living Facilities

We examined three assisted living facilities in the Study Area, referred to as the “Competitive Facilities.” The map below shows the location of the Competitive Facilities in relation to the Subject Property.

Map 4 – Subject Property in relation to Competitive Facilities



As the map shows, Concord Park in West Concord is the Competitive Facility in closest proximity to the Subject Property. Concord Park is located along Commonwealth Avenue in West Concord Center, approximately 0.4 miles, or less than a five-minute drive from the Subject Property. The Commons in Lincoln is a 10- to 15-minute drive from the Subject Property in Lincoln and is also located just off of Route 2. Benchmark at Robbins Brook is a 10- to 15-minute drive from the Subject Property in Acton.

The table below offers summary information for each of the Competitive Facilities. The information is based on phone interviews with on-site personnel at each facility (Wilson 2019, Beckwith 2018, King 2018, Booslay 2019). Additional information about each Competitive Facility can found in *Exhibit 3*.

Table 20 – Competitive Facilities Summary

Facility	Benchmark Senior Living at Robbins Brook	The Commons in Lincoln*	Concord Park**
Community	Acton	Lincoln	Concord
Distance from Subject (miles)	4.1 N	4.0 SE	0.4 SE
Study Area	yes	yes	yes
Year Built/Renovated	2001	Opened April 2016	2001
# of AL Units	64	40	62
AL Affordable Units	3 – HUD	0	3 GAFC, 17 @ 60% AMI
AL Market Units	61	40	42
# of Memory Care Units	25	24	16
AL Affordable Occupancy	n/a	n/a	100%

Facility	Benchmark Senior Living at Robbins Brook	The Commons in Lincoln*	Concord Park**
Community	Acton	Lincoln	Concord
AL Market Occupancy	100%	100%	100%
AL Affordable Wait List	None	N/A	Waitlist – did not know length
AL Market Wait List	3-3-4 households for a 1BR	3-6 months	Waitlist – did not know length
Average Age	Late 80s	AL: 85-86; MC: late 80s	83
Length of Stay	3-5 years	About 2 years	2.5-3 years

*The Commons in Lincoln information is from January 2019

**Concord Park Information is from December 2018

Unlike the Subject Property, which only offers traditional assisted living, all three Competitive Facilities offer independent living, traditional assisted living, and memory care assisted living options. Additionally, The Commons in Lincoln has skilled nursing beds on site.

The three Competitive Facilities contain a total of 166 units of traditional assisted living, of which 143 are priced at market rate and 23 are affordable. Of the 23 affordable units, six are either GAFC or have some other form of rental subsidy as defined by HUD, and 17 are self-pay at 60% of AMI.

The newest facility, The Commons in Lincoln, was recently converted from an independent living facility into a Continuing Care Retirement Community (CCRC) and opened new assisted living and skilled nursing units in April 2016. The other two Competitive Facilities were constructed in 2001. This indicates that there has been minimal construction of new assisted living facilities in the Study Area in the last decade.

Overall, staff at the Competitive Facilities reported high occupancy rates, with traditional assisted living units at 100% occupancy. Due to the nature of senior housing, it takes more time to prepare a unit for re-occupancy as well as deal with adult children and customer matters. Therefore, occupancies tend to run lower than traditional, non-service related, apartment rental housing. Therefore, these occupancy rates are higher than the senior housing industry standard 90% occupancy and points to a need for additional traditional assisted living in the Study Area. Benchmark at Robbins Brook reported short waitlists for specific one- and two-bedroom traditional assisted living units. None of the Competitive Facilities reported offering any concessions or incentives.

Staff at the Competitive Facilities reported a variety of referral sources for their units. The main referral sources for traditional assisted living units are nearby hospitals, rehabilitation facilities, or independent living facilities. Concord Park also noted that family members and friends of residents are another significant referral source.

Concord Park is located close to area amenities like the Subject Property and is located in West Concord Center. Additionally, like the Subject Property, the Commons in Lincoln is off of Route 2; however, the Commons in Lincoln is in a more sparsely populated area in further proximity to public transportation, hospitals, pharmacies, medical offices and health care, and other area amenities. Benchmark at Robbins Brook is also located in a more isolated location than the Subject Property.

Assisted Living Monthly Fee Comparison by Unit Type

The next charts show a summary of the monthly fees and services included in monthly fees for studio, one-bedroom units at each of the Competitive Facilities. All of the Competitive Facilities include transportation to doctors’ appointments, a variety of activities, weekly housekeeping, and flat linen service in their traditional assisted living monthly fees. All of the Competitive Facilities include three daily meals.

We note that we were unable to reach Concord Park and The Commons and therefore rent and fee information comes from the previous January 2019 study. We also note that assisted living fees typically increase between 3-5% per year.

60% Affordable Assisted Living Monthly Fee Comparison

The Subject Property will have 26 units affordable to households earning at or below 60% of AMI, including 23 studios and three one-bedroom units. Concord Park is the only Competitive Facility with self-pay affordable units. Concord Park contains 17 affordable units at 60% of AMI, which will be competitive to those at the Subject Property. Unlike the Subject Property, Concord Park does not offer affordable one-bedroom units. The monthly fees for the 60% units at Concord Park vary by the unit square footage. Therefore, for the purposes of this comparison, we have compared the monthly fee for a larger affordable studio to the Subject Property’s proposed 60% one-bedroom units. Like the affordable units at the Subject Property, the affordable units at Concord Park include SAMM and personal care in the base monthly fee.

Table 21 – Monthly Fee Comparison: 60% AMI Traditional Assisted Living Studios

Facility	Community	Sq. Ft.	Monthly Fee	Fee/ Sq. Ft.	Services Included in Monthly Fee		
					Meals/Day	Personal Care	Med. Management
Concord Park	Concord	350	\$3,500	\$10.00	3	1 hr/day	SAMM
Subject - 60% AMI	Concord	330	\$3,255	\$9.86	3	1.5 hr/day	SAMM

Table 22 – Monthly Fee Comparison: 60% AMI Traditional Assisted Living One-Bedroom Units

Facility	Community	Sq. Ft.	Monthly Fee	Fee/ Sq. Ft.	Services Included in Monthly Fee		
					Meals/Day	Personal Care	Med. Management
Concord Park*	Concord	Not available	\$4,950	Not avail.	3	1 hr/day	SAMM
Subject - 60% AMI	Concord	525	\$3,284	\$6.26	3	1.5 hr/day	SAMM

*Larger studio unit

The Subject Property will offer a newer product and include more personal care in the monthly fee than Concord Park. The studio units at Concord Park are very comparable in size to those planned at the Subject Property. The Subject Property’s 60% monthly fee for studio units is somewhat lower than those charged for smaller 60% of AMI units at Concord Park, and the Subject Property’s 60% monthly fee for one-bedroom units is well below those charged for the larger studio units at 60% of AMI at Concord Park. Therefore, the Subject Property’s proposed 60% monthly fees are achievable.

Market Rate Assisted Living Comparison

The Subject Property will have 40 “market rate” units priced for households earning up to 150% of AMI, including 34 studios and six one-bedroom units. Unlike the Subject Property, none of the market rate units at the Competitive Facilities include personal care in their base monthly fees. Fees at the Competitive Facilities for personal care range from \$660-\$3,450, depending on the level of care needed and the number of hours of care provided per week. In order to best compare monthly fees, we have adjusted the monthly fees at Benchmark at Robbins Brook by \$700/month, The Commons by \$660/month and Concord Park by \$775/month to include their basic level of personal care which typically includes cueing, reminders, and occasional assistance with Activities of Daily Living (“ADLs”), including dressing and bathing. We note that the personal care fee at Concord Park also includes SAMM. Like the Subject Property, the market rate units at Benchmark at Robbins Brook and The Commons do not include medication management in the base monthly fee. Benchmark at Robbins Brook charges an additional \$600-\$900 and The Commons charges an additional \$510-\$810 per month for medication management, depending on the level of care needed, and the Subject Property will charge an additional \$250/month for SAMM. The monthly fees for the market rate units at the Subject Property and the Competitive Facilities have been adjusted to include the most basic level of personal care in the monthly fee.

Table 23 – Monthly Fee Comparison: Market Rate Traditional Assisted Living Studio Units

Facility	Community	Sq. Ft.	Monthly Fee*	Fee/ Sq. Ft.	Meals/ Day	Services Included in Monthly Fee	
						Personal Care	Med. Management
Benchmark at Robbins Brook	Acton	336	\$5,350	\$15.92	3	Occasional assistance with ADLs	None**
The Commons****	Lincoln	300	\$6,630	\$22.10	3	Occasional assistance with ADLs	None**
Concord Park****	Concord	350	\$6,575	\$18.79	3	1 hr/day	SAMM***
Low		300	\$5,350	\$15.92			
High		350	\$6,630	\$22.10			
Average		329	\$6,185	\$18.94			
Subject - 150% AMI		330	\$4,400	\$13.33	3	Up to 1.5 hrs/day	Not included; SAMM: additional \$250/month

* Monthly fees adjusted to include the cost of basic level of personal care
 **Medication management is available for an additional \$510-\$900/month
 ***The cost of SAMM is included in Concord Park’s monthly personal care fee
 ****Information from January 2019 study

Table 24 – Monthly Fee Comparison: Market Rate Traditional Assisted Living One-Bedroom Units

Facility	Community	Sq. Ft.	Monthly Fee*	Fee/ Sq. Ft.	Meals/ Day	Services Included in Monthly Fee	
						Personal Care	Med. Management
Benchmark at Robbins Brook	Acton	450	\$6,100	\$13.56	3	Occasional assistance with ADLs	None**
The Commons****	Lincoln	500	\$7,110	\$14.22	3	Occasional assistance with ADLs	None**
Concord Park****	Concord	525	\$8,525	\$16.24	3	1 hr/day	SAMM***
Low		450	\$6,100	\$13.56			
High		525	\$8,525	\$16.24			
Average		492	\$7,245	\$14.67			
Subject - 150% AMI		525	\$5,250	\$10.00	3	Up to 1.5 hrs/day	Not included; SAMM: additional \$250/month

* Monthly fees adjusted to include the cost of basic level of personal care
 **Medication management is available for an additional \$510-\$900/month
 ***The cost of SAMM is included in Concord Park’s monthly personal care fee
 ****Information from January 2019 study

Comparison of Subject Property Monthly Fees to Market Rate

The tables below compare the average monthly fees for market rate traditional assisted living units at the Competitive Facilities to the Subject Property’s proposed 60% and 150% monthly fees.

Table 25 – Subject Property 60% of AMI Monthly Fees Compared to Market Monthly Fees

		Subject Property	Market Average	Diff. Market to Subject	% Difference
Studio	Rent	\$3,255	\$6,185	\$2,930	90%
	Square Feet	330	329	-1	0%
	Rent/Sq. Ft.	\$9.86	\$18.82	\$8.95	91%
One-Bedroom	Rent	\$3,315	\$7,245	\$3,930	119%
	Square Feet	525	492	-33	-6%
	Rent/Sq. Ft.	\$6.31	\$14.74	\$8.42	133%

Average market rate monthly fees are 90%-119% higher than the proposed 60% monthly fees at the Subject Property depending on bedroom size.

Table 26 – Subject Property 150% of AMI Monthly Fees Compared to Market Monthly Fees

		Subject Property	Market Average	Diff. Market to Subject	% Difference
Studio	Rent	\$4,400	\$6,185	\$1,785	41%
	Square Feet	330	329	-1	0%
	Rent/Sq. Ft.	\$13.33	\$18.82	\$5.49	41%
One-Bedroom	Rent	\$5,000	\$7,245	\$2,245	45%
	Square Feet	525	492	-33	-6%

Rent/Sq. Ft.	\$9.52	\$14.74	\$5.21	55%
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The average market rate monthly fees are 41%-45% higher than the Subject Property’s proposed “market rate” rents at 150% of AMI. The lowest market rate rent and fees, which are at The Benchmark Senior Living at Robbins Creek, are well above those at the Subject Property. Furthermore, the market rate rent and fees from the remaining two Competitive Facilities that were updated in January 2019 were already well above the proposed rent and fees at the Subject Property. The studio assisted living units at the Subject Property are comparable in size to those at the Competitive Facilities, and the one-bedroom units at the Subject Property are slightly larger than those at the Competitive Facilities.

The Subject Property will provide a substantially more affordable traditional assisted living product than the Competitive Facilities, while at the same time offering similar services and community amenities, and therefore, the market rate rents at the Subject Property are achievable.

Fees and Policies

The charts below are a comparison of fees for additional services charged in addition to base monthly fees for traditional assisted living units at the Competitive Facilities.

Table 27 – Additional Fees Charged by Competitors on Top of Base Monthly Fee

Fee Type	Benchmark at Robbins Brook	The Commons in Lincoln	Concord Park
Community Fee	AL: \$6,000, MC: \$7,000	AL: \$6,000; MC: \$6,500	\$4,500
Second Occupant	25% of the base rental fee	25% of the base rental fee	\$1,400
Respite Care	Additional \$300/month (shared) -\$450/month (own room)	Do not offer	\$250-\$350/day
Guest	none	none	n/a
Meal Tray Service	\$5	Free	\$15
Extra/Guest Meals	breakfast: \$8, lunch: \$10, dinner: \$12	breakfast: \$6, lunch: \$8, dinner: \$10	Guest meals: \$10/meal on non-holidays; \$20/meal on holidays
Weekly Personal Laundry Service	1 load of personal laundry/week	1 load of personal laundry/week	\$125
Pet Policy	Pets allowed; \$500 pet fee	Pets allowed; \$500 pet fee	Pets allowed; \$750 pet fee

Table 28 – Fees for Traditional Assisted Living Personal Care Charged at Competitive Facilities

Fee Type	Medication Management	Personal Care	Incontinence Care
Benchmark at Robbins Brook	Level I (once a day): \$600/mo., Level II (twice a day): \$700/mo., Level III (3 x per day): \$900/mo.	Standard (cueing/reminders): \$700/mo. Level 1 (minimal assistance): \$1,320/mo. Level 2 (moderate assistance): \$1,980/mo. Level 3 (two-person assistance): \$2,880/mo. Level 4 (one on one care or mechanical lift with transfers): \$3,450/mo.	\$180-\$240/month depending on level of care

Fee Type	Medication Management	Personal Care	Incontinence Care
The Commons in Lincoln	Level I (once a day): \$510/mo., Level II (twice a day): \$660/mo., Level III (3 x per day): \$810/mo.	Standard (cueing/reminders): \$660/mo. Level 1 (minimal assistance): \$1,320/mo. Level 2 (moderate assistance): \$1,980/mo. Level 3 (two-person assistance): \$2,880/mo. Level 4 (one on one care or mechanical lift with transfers): \$3,450/mo.	\$180-\$240/month depending on level of care
Concord Park	Limited Medication Administration: \$750	Affordable: included; Market rate: Personal Care + SAMM: \$775/month	\$500/month

All Competitive Facilities charge a one-time community fee ranging from \$4,500 to \$7,000 for traditional assisted living units, as compared to the Subject Property, which charges \$4,000. Concord Park charges a second occupant fee of \$1,400. Benchmark at Robbins Brook and The Commons at Lincoln charge an additional 25% of the base rental fee for a second occupant, or approximately \$1,163-\$1,838 depending on the unit type and property. Respite care ranges from \$300 per month at Benchmark at Robbins Brook to \$350 per day at Concord Park. The Commons in Lincoln does not provide respite care but allow residents to lease a unit for 30 days and move out with at no cost. None of the facilities charge for a guest to stay overnight. Additionally, all facilities charge for guest meals, which range from \$6 to \$12 per meal. All of the Competitive Facilities charge for meal tray service, which ranges from \$5 to \$15 per meal. Additionally, all of the Competitive Facilities are pet-friendly. Benchmark at Robbins Brook and The Commons in Lincoln charge a one-time pet fee of \$500 and Concord Park charges a one-time pet fee of \$750.

All of the Competitive Facilities offer Limited Medical Administration (“LMA”) to traditional assisted living residents for an additional fee. Benchmark at Robbins Brook charges \$600 to \$900 for medication management, The Commons in Lincoln charge fees for medication management ranging from \$510 to \$810 per month for traditional assisted living, and Concord Park charges \$750 per month for LMA.

As noted previously, none of the Competitive Facilities include any personal care in the base fee for traditional assisted living. Benchmark at Robbins Brook charges \$700 to \$3,450/month and The Commons charges \$660 to \$3,450 depending on the level of care needed in traditional assisted living. Concord Park charges a combined fee of \$775/month for SAMM and up to an hour of personal care per day for its market rate traditional assisted living units. None of the Competitive Facilities include incontinence care in the base monthly fee. Benchmark at Robbins Brook and The Commons in Lincoln charge \$180 - \$240/month for incontinence care, which includes supplies. Concord Park charges \$500/month for incontinence care.

Banker and Tradesman Research

Banker and Tradesman tracks the sales prices listed on deeds recorded at the County Registry of Deeds in Massachusetts. The chart below shows the annual year-to-date median sales price for single-family homes for the period of January through November for the years 2008 through

2019 for Concord and Massachusetts, as well as the year over year changes. While the median sales prices in Concord were clearly affected by the housing crisis in 2007, and the subsequent recession, they have since surpassed their all-time high. The median sales price in Concord has been consistently more than double that of the state for the each of the years studied. In the first ten months of 2019, the median single-family home price in Concord was \$1,247,500, nearly triple the \$400,000 figure for Massachusetts (The Warren Group 2019).

Table 29 - Median Single-Family Home Sale Price – January-October (2008 – 2019)

Year	Concord		Massachusetts	
	\$	% Change	\$	% Change
2019	\$1,247,500	17.8%	\$400,000	3.9%
2018	\$1,059,000	1.9%	\$385,000	5.5%
2017	\$1,039,000	12.3%	\$365,000	5.2%
2016	\$925,000	3.2%	\$347,000	2.1%
2015	\$896,000	-0.2%	\$340,000	1.5%
2014	\$897,500	10.8%	\$334,900	3.0%
2013	\$810,000	11.7%	\$325,000	12.1%
2012	\$725,000	3.6%	\$290,000	0.0%
2011	\$700,000	2.7%	\$290,000	-2.5%
2010	\$681,500	-7.9%	\$297,450	4.4%
2009	\$739,900	7.4%	\$285,000	-8.1%
2008	\$689,126	--	\$310,000	--

We also looked at the total number of single-family home sales in Concord and Massachusetts for the same time period, including year over year change as shown on the chart below (The Warren Group 2019). The number of sales in Concord has been relatively volatile since 2008. From both a price and volume perspective, Concord appears to have fully recovered from the nationwide housing market collapse that began in 2007.

Table 30 - Number of Single Family Home Sales – January-October (2008 – 2019)

Year	Concord		Massachusetts	
	#	% Change	#	% Change
2019	170	-15%	49,524	-1%
2018	199	21%	50,201	-2%
2017	165	-12%	51,270	0%
2016	188	11%	51,104	11%
2015	169	6%	46,160	10%
2014	160	-20%	41,802	-2%
2013	199	0%	42,627	6%
2012	199	19%	40,288	21%

2011	167	18%	33,416	-5%
2010	142	8%	35,259	3%
2009	131	-10%	34,327	-3%
2008	146	--	35,297	--

Housing Permits

Between 2012 and 2018 the majority of residential development in Concord was the construction of single-family homes. During this time period, 305 units were permitted in five-plus unit buildings during this time period, and there were no units permitted in two-, three-, or four-family buildings during this time (U.S. Census Bureau 2018). This illustrates that there has been some multi-family housing recently built that may be appropriate for aging seniors who require one level living. However, there have been no new multifamily units permitted in the most recent 4 years.

Table 31 - Number of Housing Units Permitted by Type in Concord

Year	Single Family	Two Family	Three & Four Family	Five or More Families
2018	50	0	0	0
2017	44	0	0	0
2016	54	0	0	0
2015	54	0	0	0
2014	43	0	0	74
2013	42	0	0	129
2012	35	0	0	102
Total	322	0	0	305

Planned Assisted Living Facilities

We contacted staff in the planning, zoning, and building departments for Concord and the neighboring towns of Acton, Lincoln, and Maynard. We also examined the BPDA website, the internal LDS pipeline list, and bldup.com to identify any planned or under construction assisted living facilities that may be competitive to the Subject Property. We learned of one permitted assisted living facility that would be competitive to the Subject Property.

On December 13, 2018, Volunteers for America was granted a special permit from the Town of Concord to construct an addition to its existing Concord Park Assisted Living Facility. The addition would include the new construction of 16 additional assisted living units, of which one would be income-restricted to persons earning at or below 60% of AMI, one would be income-restricted to persons earning at or below 80% of AMI, one would be income-restricted to persons earning at or below 100% of AMI, and 13 would be unrestricted market rate units.

According to Concord Town Planner Elizabeth Hughes, some of the new units would be flexible/adaptable to be memory care units. At the time of our survey, Ms. Hughes noted that Volunteers for America planned to break ground on the addition in Spring 2019 (Hughes 2018).

Demand Analysis

The methodology used to assess demand is analogous to peeling away the layers of an onion. The subject area has been defined both within the context of its physical characteristics as well as its socio-economic characteristics.

Demand for Assisted Living

A typical assisted living resident is in their early to mid-80's, therefore, we examined households age 75 and older for assisted living demand. Most individuals over 75 are living on fixed incomes. Substantial percentages of frail elderly are living on social security, pensions, and accumulated savings. Market rate residents for assisted living have three major sources for paying rent: current income, savings and family support. Many assisted living residents sell their homes prior to moving into assisted living facilities, and therefore are able to supplement their monthly fee payment from their savings from the sale of their home.

In order to determine how much income an individual needs to afford to live in an assisted living facility, we assume that an individual will spend a fixed amount of their income on the monthly fee. For residents in assisted living, most of their personal needs are covered in the monthly fees. Monthly fees include room, board, weekly housekeeping, personal care, recreation activities, security, maintenance, and basic transportation. Many medical needs not covered in the monthly fee are reimbursable through Medicare. The major items not covered are personal income taxes telephone, cable, and personal items. Based on industry data, we therefore assume that an individual will spend 80%-85% of their income on assisted living. It should be noted that our calculations do not include a spend-down of principal from assets achieved through selling one's home and/or savings. What this essentially means is that it is more likely than not that since an average stay in assisted living is 2.1 years, a homeowner could spend-down the proceeds of the sale of their home without any monthly income.

We used ESRI data to examine demand for **83 traditional assisted living units at the Subject Property according to income level.**

We examined one-person renter and owner households in the Study Area earning 0%-30% of AMI, 30%-60% of AMI and 60%-150% of AMI in the Boston-Cambridge-Quincy, MA-NH HUD Service Area. These income limits are summarized in the table below.

Table 32 – Boston-Cambridge-Quincy HUD Income Limits

AMI	1-Person
30%	\$21,700
60%	\$43,440
150%	\$108,600

The table below summarizes the demand and capture analysis for 2017 and projected for 2022. The first line is all age and income qualified households. We then calculated the number of

households that have a need for assistance with ADLs. As mentioned previously, ADLs involve the ability to bathe, toilet, dress oneself, as well as perform unassisted locomotion. We base our assumptions on the findings of the most recent data from the National Center for Health Statistics’ National Health Interview Survey on the number of limitations in ADLs by age group. As mentioned previously, the average resident in an assisted living facility is in their early- to mid-80s; however, ESRI does not report income in additional age segments above age 75. We therefore used the ADL limitation multiplier of 23.9%, which reflects the aggregate portion of persons in both the 75-84 and 85+ age groups with one or more ADL limitation (National Center for Health Statistics 2009). For all three income levels examined, the number of age- and income-qualified households with an ADL will increase between 2017 and 2022.

Table 33

Capture Rate Analysis			
2017			
	30%	60%	150%
Qualified 75+	697	657	1,148
23.9%	167	157	274
Competition	5	17	94
Qualified net comp.	162	140	181
Units*	9	13	20
Capture Rate	5%	9%	11%
2022			
	30%	60%	150%
Qualified 75+	810	706	1,204
23.9%	194	169	288
Competition	5	18	109
Qualified net comp.	189	151	179
Units*	9	13	20
Capture Rate	4%	9%	11%

*50% of units will be leased from the Study Area

We then subtracted out the traditional assisted living units in the Study Area by income category from the number of qualified households in 2017. We also subtracted out the 16 planned assisted living units at Concord Park Expansion from the number of qualified households in 2022. We have assumed that half of the total units at Benchmark at Robbins Brook and The Commons will be leased by residents from outside of the Study Area. This is due to the fact that both facilities are on the edge of a 10-minute drive time zone.

We then calculated a capture rate. This tells us what percentage of the qualified individuals your facility needs to capture. Therefore, we have assumed that 50%, or 42 units, would be leased by individuals within the 15-minute drive time Study Area, and the remaining 41 units

will be leased by persons from outside the Study Area who are looking to live closer to their adult children. This estimate is based on industry data and the assumption that a higher proportion of persons will come from outside the Study Area because the Subject Property will be a low cost provider in a high income area. Since traditional assisted living is need driven verses choice driven, we typically look for capture rates at or below 10%.

In 2022, the 30%, 60%, and 150% units at the Subject Property will only have to capture 4%, 9%, and 11% of the qualified households, respectively. The 100% occupancy of the Competitive Facilities and a 65 plus population, which is projected to continue growing through 2035 are additional indicators of demand. Additionally, the monthly fees at the Subject Property are significantly below those being charged at the Competitive Facilities, and include services comparable or superior to those being charged at the Competitive Facilities. **Therefore, there appears to be a need for the 83 traditional assisted living units at the Subject Property.**

Lease Up and Absorption

The main referral sources to assisted living are adult children, nearby hospitals, rehabilitation facilities, and existing senior housing facilities. There are very strong demand indicators with the growing adult child population, and lower than average capture rates for each income level. In addition, supply appears to be constrained. This is illustrated by long wait lists at the public subsidized elderly housing, with wait times ranging from one year to over five years. Furthermore, the Competitive Facilities have 100% occupancy for traditional assisted living.

There has been very little assisted living product built recently in the region in recent years, and most of the assisted living facilities that have been built have been predominantly Memory Care assisted living. Additionally, unlike the Subject Property, none of the assisted living facilities that have opened in recent years have had an affordable component. Therefore, we have no on point absorption data to use for our analysis.

The Commons in Lincoln is the only brand-new assisted living facility built or converted in the past five years. The Commons is the expansion of an existing 168-unit independent living facility campus to include a new construction 64-unit assisted living facility, including 40 units of traditional assisted living, 24 units of Memory Care assisted living, and 32 skilled nursing beds. All of the new assisted living units at The Commons are priced at market rate. The Commons opened in April 2016 and leased an estimated 3-5 assisted living units per month, with all new assisted living units being absorbed within the property's first year of opening.

Additionally, Heywood Wakefield Commons in Gardner is a totally affordable assisted living facility with 78 units. It leased 5 units a month with a lease up of 15 months. In addition, Linda Manor in Leeds opened in October 2014 and leased 8-10 units a month over its first six months.

Given the developers strong track record of leasing these types of facilities and the affordable price point, we believe that five units leased at opening and 3-5 units leased per month as projected by Grantham, is achievable.

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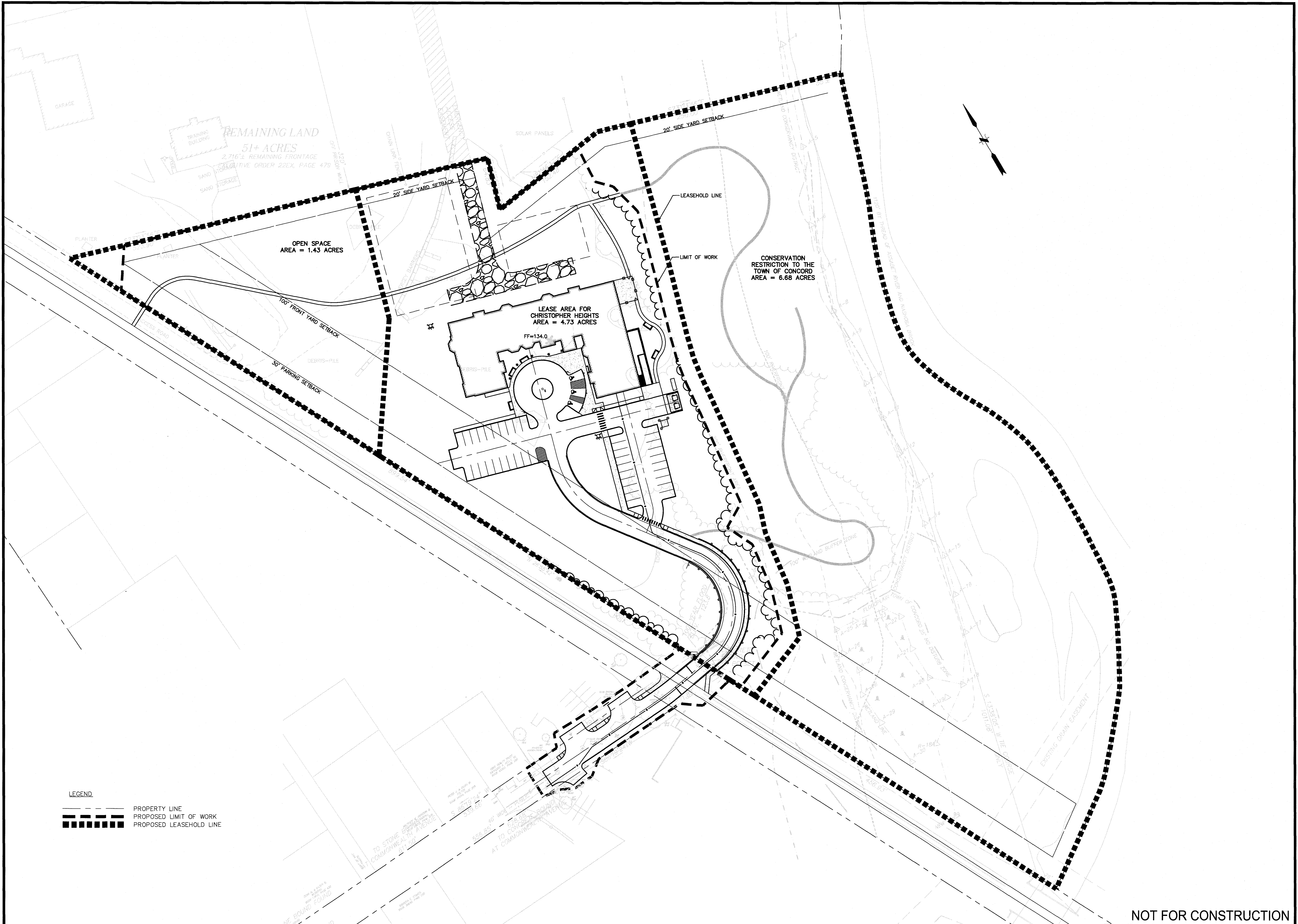
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Certification

LDS Consulting Group, LLC certifies that it has no financial interest in the proposed Christopher Heights of Concord. LDS certifies that recommendations and conclusions are based solely on professional opinion and best efforts.

Exhibit 1 – Site Plan and Floor Plans

File Path: J:\DWG\IP20150485A10\civil\plan\20150485A10_STP01.dwg Plotted: Fri, April 28, 2017 - 10:39 AM User: smacdonald
 MS VIEW: Layer State: Plotter: DWG TO PDF.PC3 CTB File: FO.STB



LEGEND
 - - - - - PROPERTY LINE
 - - - - - PROPOSED LIMIT OF WORK
 - - - - - PROPOSED LEASEHOLD LINE

THE GRANTHAM GROUP, L.L.C.
 LEASE AREA PLAN
 CHRISTOPHER HEIGHTS ASSISTED
 LIVING FACILITY PROJECTS
 MASSACHUSETTS
 CONCORD

PROJ. No.: 20150485.A10
 DATE: 11/16/2016

C1.01

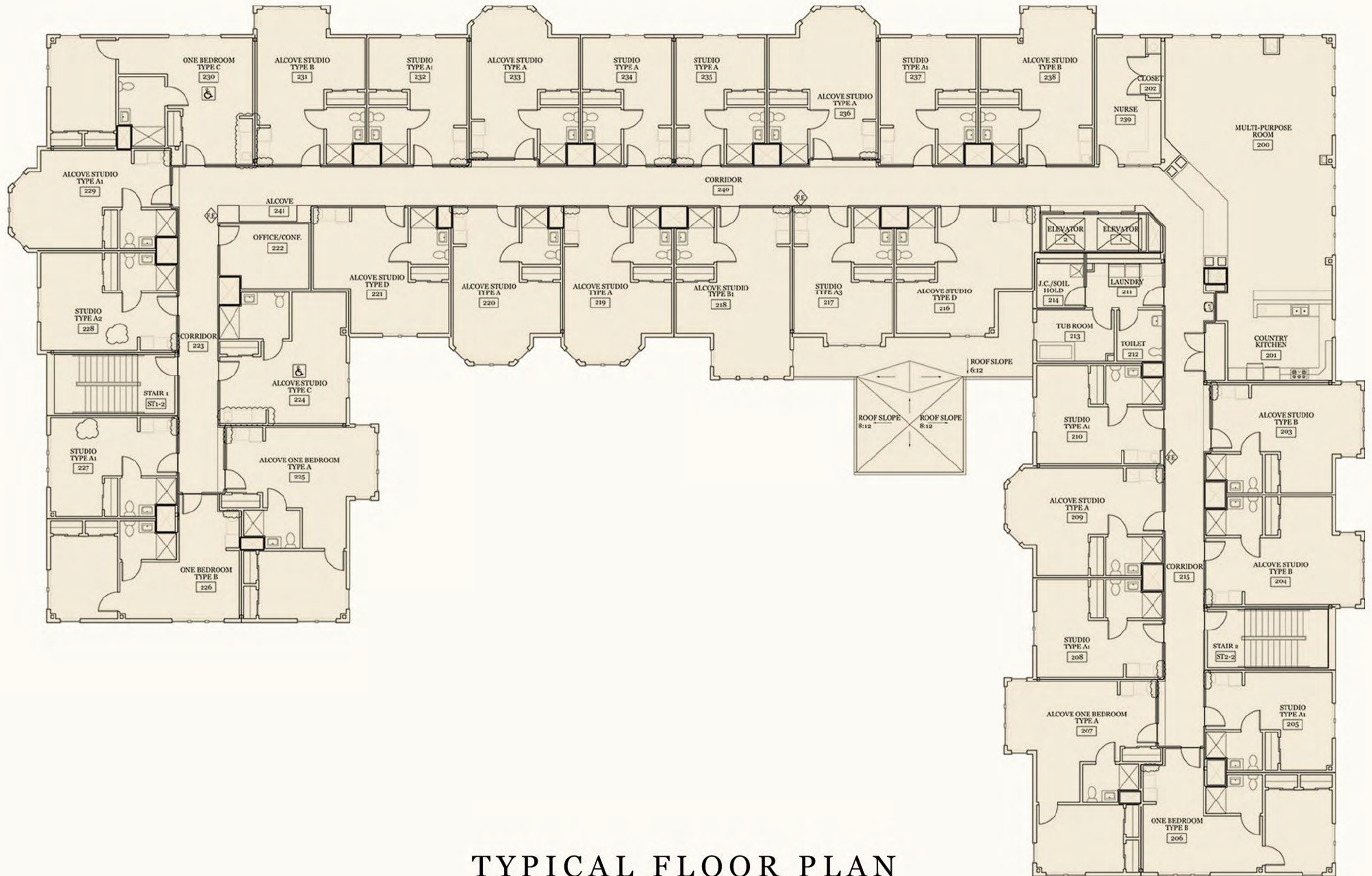
NOT FOR CONSTRUCTION

SCALE: HORZ.: 1" = 50'
 VERT.: 1" = 20'
 DATUM: NAD 83
 HORZ.: 1" = 50'
 VERT.: 1" = 20'
 GRAPHIC SCALE

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 REG. PROFESSIONAL ENGINEER
 MASSACHUSETTS

No.	DATE	DESCRIPTION	DESIGNER	REVIEWER
3.	4/28/2017	REVISED PER COMMENTS	SM	DD
2.	3/30/2017	REVISED PER COMMENTS	SM	DD
1.	3/7/2017	SHEET ADDED PER COMMENTS	SM	DD



TYPICAL FLOOR PLAN

Exhibit 2 – Site Pictures



View of Subject Property from opposite side of Bruce Freeman Rail Trail



View of Subject Property from opposite side of Bruce Freeman Rail Trail



View of Subject Property from the end of Winthrop Street



View of Winthrop Street from the eastern border of the Subject Property



Industrial/Office building on northern side of Winthrop Street



Industrial/Office building on southern side of Winthrop Street



Single Family Home along Winthrop Street



West Concord Shopping Plaza along Route 62/Main Street

Exhibit 3 – Detailed Competitive Facility Profiles

Property		Benchmark Senior Living at Robbins Brook	
Type	AL/MC		
Survey Date	12/17/2019		
Address	10 Devon Drive		
Community	Acton		
Study Area	yes		
Telephone	978-206-1992		
Contact	Jay Booslay, Director of Community Relations; Lisa Beckwith, Director of Community Relations		
Website	http://www.benchmarkatrobbsbrook.com/		
Manager/Owner	Benchmark Senior Living		
Completion Date	2001		
Property Description	64 units of traditional assisted living and 25 units of memory care assisted living in one three story building. IL for sale condos is separate		
Location Description	In a village setting on 12 acres campus with 54 ages 55+ independent living garden style condos adjacent to Route 27.		
Distance from Subject (miles)	4.1 N		
Units			
Total Units	89		
AL Units	64		
AL Affordable Units	3 (based on HUD guidelines)		
AL Market Units	61		
AL ALZ # Units	25		
Unit Mix			
AL Studio	25		
AL One	35		
AL Two	4		
MC Studio	3		
MC One	2		
MC Shared	20		
Size of Units			
AL Studio	336		
AL One	450		
AL Two	820		
ALZ Studio	336		
ALZ One	450		
ALZ Two	companion hard walled, share bath 160		
Payment/Reimbursement			
Accept Medicaid/SSI?	no		

Property		Benchmark Senior Living at Robbins Brook	
# of Residents w/Medicaid or SSI		n/a	
Eligibility			
Minimum Age		55	
Ambulatory		yes	
Medical Services		can bring in outside medical services	
Occupancy/Turnover/Waitlist			
# Vacant Units:		2	
AL Affordable Occupancy		n/a	
AL Market Occupancy		100%	
ALZ Occupancy		92%, 2 shared MC units vacant	
Waiting List:		3-4 HHs for 1BR	
Annual Resident Turnover:		2-3 units per month	
Rents			
AL Studio		\$4,650	
AL One		\$5,400	
AL Two		\$6,250	
ALZ Studio		\$7,350	
ALZ One		\$7,050	
ALZ Shared (from Dec 2018)		\$5,550	
Included in Rent			
Meals/Day/Type:		yes x 3	
Personal Care:		none included in base rent. will have different levels of care.	
Self-Administered Medication Management ("SAMM"), which provides the resident with reminders and assistance in taking medication.		Not included. See below.	
Limited Medication Administration ("LMA"), often for an additional fee, whereby certain medications may be administered by a nurse		yes for extra fee; AL: Level I (once a day): \$600/mo., Level II (twice a day): \$700/mo., Level III (3 x per day): \$900/mo. MC: Harbor Care Mgmt 1: \$700/mo., Harbor Care Mgmt 2: \$900/mo.	
Housekeeping:		weekly	
Linen		weekly	
Personal Laundry Service:		yes, 1 load of personal laundry/week	
Transportation:		scheduled transportation for shopping and activities- doctor's appointments	
Social Events		concerts, book discussions, current events, cultural programs, educational seminars, speakers and live entertainment, trips	
Other Fees			
Second Occupant		25% of the base fee of the rent	
Community Fee		\$6,000 traditional, \$7,000 MC	

Property	Benchmark Senior Living at Robbins Brook
Extra Personal Care	2019: Starting at \$700 2018: Standard (cueing/reminders): AL: \$660/mo.; MC: \$810/mo. Level 1 (minimal assistance with ADLs): AL: \$1,320/mo., MC: \$1,500/mo. Level 2 -- moderate assistance with ADLs: AL: \$1,980/mo., MC: \$2,310/mo. Level 3 (two person assistance) with ADLs: AL: \$2,880/mo., MC: \$3,120/mo. Level 4 (one on one care or mechanical lift with transfers): AL: \$3,450/mo., MC: \$3,600/mo.
Incontinence Care	\$180 included supplies 1-2 Depends: \$6/day, 2+ Depends: \$8 day) or \$240 for the Level 2 of care
Respite Care	Additional \$300/month (shared) \$450/month (own room)
Guest	none
Meal Tray Service	yes, additional cost: \$5/meal
Extra/Guest Meals?	breakfast: \$8, lunch: \$10, dinner: \$12
Rehab	no
Move in Concessions?	none
Common Amenities	
Beauty/Barber Shop	yes
Activity Room	yes
Dining Room	yes
Exercise/Fitness Room	no
Common Laundry Room	no
Garage/Covered Parking	no
Library	yes
Music Room	yes
Resident Kitchen	yes
Storage Room; Cost?	no
Sun room	yes
Pub	country kitchen - alcohol?
Smoking Area	yes
Gift shop/convenience store	no
Pool/Whirlpool	whirlpool w/hydro tub
Computer Room	yes
Walking Paths/Com. Garden	Yes, multiple paved waling areas on site and across the street
Pet Friendly? Cost?	yes, \$500 one-time fee
Place of worship	no but have visiting priests and rabbis
Other	front porch, enclosed courtyard for memory care neighborhood
Unit Amenities	
Balcony/Patio	yes - some
Refrigerator/Freezer	fridge, freezer?
Stove Top/Oven	no

Property		Benchmark Senior Living at Robbins Brook	
Microwave			yes
Dishwasher			no
Shower Stall/Tub			walk in shower
Cable /telephone/internet ready			yes
AC			central?
Resident Security			emergency response system + grab bars
Tenant Profile			
Entry Age		Around 86 or 87, but this year has had some younger women (early 80s late 70s)	
Length of Stay			3-5 years
Average Age			Late 80s
Market Area:			
Primary:		80% concord and communities that surround it	
Secondary:		20% come from outside area to be close to adult children	
Tertiary/Return Migration:		see above	
Benefits of Location		Very suburban setting with feeder from IL (also is the best feature)	
Worst Feature?		Older building, simpler finishes	

Property		The Commons in Lincoln (formerly the Groves in Lincoln)	
Type		AL/AZ	
Survey Date		1/2/19; 10/6/2017; 7/27/2015	
Address		1 Harvest Circle	
Community		Lincoln	
Study Area		yes	
Telephone		781-430-6704	
Contact		Eric Wilson	
Website		http://www.thecommonsinlincoln.com/	
Manager/Owner		Benchmark Senior Living	
Completion Date		Opened April 2016	
Property Description		The Commons is now a CCRC. new facility on existing campus of 168 unit independent living facility. Completed in April 2016. New units include 40 AL units, 24 Dementia Care Assisted Living units, and 26 skilled nursing units (including studio and shared units) with 32 skilled nursing beds.	
Location Description		Located on existing campus of IL neighborhood at intersection of Route 2 and 2A -- Crosby Corner on Concord border	
Distance from Subject (miles)		4.0 SE	
Units			
Total Units		64	
AL Units		40	
AL Affordable Units		0	
AL Market Units		40	
AL ALZ # Units		24	
Unit Mix			
AL Studio		9	
AL One		22	
AL Two		9	
MC Studio		16	
MC One			
MC Shared		8	
Size of Units (Sq. Ft.)			
AL Studio		300	
AL One		500	
AL Two		700 - 800	
ALZ Studio		300	
ALZ One		n/a	
ALZ Two		n/a	
Payment/Reimbursement			
Accept Medicaid/SSI?		100% private pay	
# of Residents w/Medicaid or SSI		0	

Property	
The Commons in Lincoln (formerly the Groves in Lincoln)	
Eligibility	
Minimum Age	62
Ambulatory	no
Medical Services	can bring in outside medical services
Occupancy/Turnover/Waitlist	
# Vacant Units:	0
AL Affordable Occupancy	n/a
AL Market Occupancy	100%
ALZ Occupancy	100%
Waiting List:	3-6 months
Annual Resident Turnover:	Too new
Rents	
AL Studio	\$5,970
AL One	\$6,450
AL Two	\$7,350
AL Shared	n/a
ALZ Studio	\$6,899 (did not have time...from 2017 survey)
ALZ One	n/a
ALZ Two	\$5,399 (share bath)...did not have time. From 2017 survey
Included in Rent	
Meals/Day/Type:	yes x 3
Personal Care:	none included in base rent. will have different levels of care.
Self-Administered Medication Management ("SAMM"), which provides the resident with reminders and assistance in taking medication.	not included. See below
Limited Medication Administration ("LMA"), often for an additional fee, whereby certain medications may be administered by a nurse	yes for extra fee; AL: Level I (once a day): \$510/mo., Level II (twice a day): \$660/mo., Level III (3 x per day): \$810/mo. MC: Harbor Care Mgmt 1: \$660/mo., Harbor Care Mgmt 2: \$810/mo.
Housekeeping:	weekly
Linen	weekly
Personal Laundry Service:	yes, 1 load of personal laundry/week
Transportation:	Will transport residents to medical appointments
Social Events	2 outings a week, lots of musicians, lectures
Other Fees	
Second Occupant	25% of the base fee of the rent (\$1,620 for 1BR AL, \$1,838 for 2BR AL)
Community Fee	\$6,000 AL; \$6,500 MC

Property	The Commons in Lincoln (formerly the Groves in Lincoln)
Extra Personal Care	Standard (cueing/reminders): AL: \$660/mo.; MC: \$810/mo. Level 1 (minimal assistance with ADLs): AL: \$1,320/mo., MC:\$1,500/mo. Level 2 -- moderate assistance with ADLs: AL: \$1,980/mo., MC: \$2,310/mo. Level 3 (two person assistance) with ADLs): AL: \$2,880/mo., MC: \$3,120/mo. Level 4 (one on one care or mechanical lift with transfers): AL: \$3,450/mo., MC:\$3,600/mo.
Incontinence Care	\$180 included supplies (1-2 Depends: \$6/day, 2+ Depends: \$8 day) or \$240 for the Level 2 of care
Respite Care	Do not offer
Guest	none
Meal Tray Service	no charge
Extra/Guest Meals?	breakfast: \$6, lunch: \$8, dinner: \$10
Rehab	in the skilled building separate
Move in Concessions?	None
Common Amenities	
Beauty/Barber Shop	Yes
Activity Room	yes
Dining Room	yes
Exercise/Fitness Room	yes
Common Laundry Room	no
Garage/Covered Parking	no
Library	yes
Music Room	no have baby grand piano lobby
Resident Kitchen	yes
Storage Room; Cost?	no
Sun room	yes
Pub	yes - café
Smoking Area	no
Gift shop/convenience store	no
Pool/Whirlpool	yes - pool
Computer Room	Yes
Walking Paths/Com. Garden	both
Pet Friendly? Cost?	yes, \$500 one time fee
Place of worship	Have services come in on wed. catholic
Other	Advance degrees, engineers, architects
Unit Amenities	
Balcony/Patio	No
Refrigerator/Freezer	refrigerator
Stove Top/Oven	no
Microwave	yes
Dishwasher	no

Property		The Commons in Lincoln (formerly the Groves in Lincoln)
Shower Stall/Tub		showers
Cable /telephone/internet ready		yes
AC		central
Resident Security		emergency response + grab bars
Tenant Profile		
Entry Age		AL: mid 80s; MC: late 80s
Length of Stay		just opened, but guessed about 2 yrs
Average Age		85 or 86 in AL and 88-89 in MC
Market Area:		
Primary:		80% from Lincoln, Concord, Belmont, Arlington, Acton, Carlise (10-15 miles)
Secondary:		20% out of state from Michigan, Florida, South Carolina
Tertiary/Return Migration:		see above
Best Sources of Referral		Independent Living
Benefits of Location		Major highway system
Best Feature		New renovation
Worst Feature?		shared units

Property		Concord Park	
Type	AL/MC (also has a few independent living units)		
Survey Date	12/31/18; 10/4/2017		
Address	68 Commonwealth Avenue		
Community	Concord		
Study Area	yes		
Telephone	978.369.4728		
Contact	Maryellen King, Executive Director		
Website	https://www.seniorlivingresidences.com/communities/concord-park/		
Manager/Owner	Manager: Senior Living Residences, Owner: VOA		
Completion Date	2001		
Property Description	One 3-story elevator building with secure Memory Support Neighborhood wing on 9-acre parcel with large meadow behind building with walking paths and surface parking in front of building. Also includes a small amount of independent living units ("only 10%-15% of all units")		
Location Description	Located in W. Concord Village across from commuter rail station and new Brookside Square 74-unit market rate rental development along banks of the Assabet River		
Distance from Subject (miles)	0.4 SE		
Units			
Total Units	78		
AL Units	62		
AL Affordable Units	20 affordable (3 GAFC, 17 @ 60% AMI for Concord)		
AL Market Units	42		
AL ALZ # Units	16 (13 studios, 3 2 BRs - shared suites)		
Unit Mix			
AL Studio	33		
AL One	24		
AL Two	5 (all affordable shared suites)		
MC Studio	13		
MC One	0		
MC Shared	6		
Size of Units			
AL Studio	350		
AL One	525		
AL Two	500 - 700		
ALZ Studio	340		
ALZ One	n/a		
ALZ Two	500 - 700		
Payment/Reimbursement			
Accept Medicaid/SSI?	only for GAFC units		
# of Residents w/Medicaid or SSI	3		
Eligibility			
Minimum Age	62		

Property	Concord Park
Ambulatory	must be weight bearing
Medical Services	can bring in outside medical services
Occupancy/Turnover/Waitlist	
# Vacant Units:	0
AL Affordable Occupancy	100%
AL Market Occupancy	100%
ALZ Occupancy	100%
Waiting List:	Waitlists for market rate and affordable – did not know length
Annual Resident Turnover:	Did not know
Rents	
Rents vary based on square footage	
AL Studio	Affordable (60% AMI): \$3,500-\$4,950; market rate: \$5,800-\$7,250
AL One	market rate: \$7,750-\$9,250
AL Two	all affordable - shared suites, \$2,500 per resident
ALZ Studio	\$8,975-\$9,950 - private room
ALZ One	n/a
ALZ Shared	\$7,750 - \$8,250 - shared suite
Included in Rent	
Meals/Day/Type:	3 meals per day
Personal Care:	Affordable: included in base monthly fee; Market rate AL: \$775 combined monthly fee for SAMM and personal care (up to one hour/day)
Self-Administered Medication Management (“SAMM”), which provides the resident with reminders and assistance in taking medication.	
Limited Medication Administration (“LMA”), often for an additional fee, whereby certain medications may be administered by a nurse	
Housekeeping:	weekly
Linen	weekly
Personal Laundry Service:	\$125 for personal laundry
Transportation:	Regularly scheduled shopping and restaurant trips as well as transportation to medical appointments up to 10 miles away, 20 miles roundtrip
Social Events	exercise programs, outings, spiritual activities, educational programs, etc.
Other	daily bed making and trash removal
Other Fees	
Second Occupant	\$1,400/month
Community Fee	\$4,500 health/wellness fee
Extra Personal Care	Not available
Incontinence Care	\$500/month
Respite Care	\$250 - \$350/day
Guest	none
Meal Tray Service	\$15
Extra/Guest Meals?	Guest meals: \$10/meal on non-holidays, \$20/meal on holidays

Property	Concord Park
Rehab	n/a
Move in Concessions?	none
Common Amenities	
Beauty/Barber Shop	yes
Activity Room	yes
Dining Room	yes
Exercise/Fitness Room	no
Common Laundry Room	yes
Garage/Covered Parking	surface only
Library	yes
Music Room	no
Resident Kitchen	yes
Storage Room; Cost?	no
Sun room	yes
Pub	yes - country kitchen
Smoking Area	non-smoking community
Gift shop/convenience store	yes
Pool/Whirlpool	no
Computer Room	yes
Walking Paths/Com. Garden	both including walking trail along Assabet River
Pet Friendly? Cost?	yes, charge – one time \$750 pet fee
Place of worship	do not have dedicated space, but resident hold church services
Other	courtyard and patio with umbrella tables + a gazebo
Unit Amenities	
Balcony/Patio	none
Refrigerator/Freezer	fridge, freezer
Stove Top/Oven	stove top
Microwave	yes
Dishwasher	no
Shower Stall/Tub	walk in shower
Cable /telephone/internet ready	yes
AC	central
Resident Security	emergency response system in unit + grab bars
Tenant Profile	
Entry Age	Did not know
Length of Stay	2.5- 3 years
Average Age	83
Market Area:	
Primary:	Lincoln, Concord, Acton, Westford, W. concord

Property	Concord Park
Secondary:	moving back to area to be closer to adult children
Tertiary/Return Migration:	See above
Best Sources of Referral	family and friends of residents; hospitals and rehab centers
Benefits of Location	combination of urban vibe in downtown concord and rural setting of campus itself
Best Feature	Location, owners, and management
Worst Feature?	Facility in need of modernization (repainting and carpet replacement in AL occurred in last 8-10 months; no upgrades on MC side, but needed)

Exhibit 4 – Market Analysis Form

PRIMARY MARKET AREA ANALYSIS SUMMARY

DEVELOPMENT NAME:	<u>Christopher Heights of Concord</u>	TOTAL UNITS	83
LOCATION:	<u>6X Winthrop Street, Concord, MA</u>	LIHTC UNITS	43
PMA BOUNDARY:	<u>15-minute Drive Time from Subject Property</u>		

RENTAL HOUSING STOCK

RENTAL TYPE	# PROPERTIES	TOTAL UNITS	VACANT UNITS	AVERAGE OCCUPANCY	
ALL RENTAL HOUSING	3	166	0	100%	
LIHTC	1	17	0	100%	Includes the 17 units at 60% of AMI at Concord Park
MARKET RATE HOUSING	3	143	2	100%	100% for Assisted living units
OTHER ASSISTED/SUBSIDIZED	2	6	0	100%	Includes the 3 GAFC units at Concord Park and the 3 HUD units at Robbins Brook

Note: We only included assisted living facilities as our comps for this form. For one stop, we used Subject 60% LIHTC rents

How many applicants are on the local housing authority's public housing waiting list?	Concord HA: wait time of 2+ years for a Concord resident and about 8-10 years for a non-resident. MassNAHRO Centralized Wait List: 215,853 as of 1/6/2020. As of 12/20/18, 187 with a Concord Preference
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LIHTC HOUSING*

PROPERTY	UNIT TYPE	SIZE (SF)	MONTHLY FEE (LESS UA)	UTILITY ALLOWANCE	PROPOSED MONTHLY FEES PER ONE-STOP (LESS UA)	VACANCY RATE
<u>Concord Park 60% units</u>	0BR	350	\$3,500-\$4,950	n/a	\$3,255	0%
	1BR			n/a	\$3,315	
	2BR			n/a		
	3BR					
	4BR					

*Monthly Fees adjusted to include the basic cost of personal care and SAMM to match the 60% units at the Subject Property

	0BR					
	1BR					
	2BR					
	3BR					
	4BR					

	0BR					
	1BR					
	2BR					
	3BR					
	4BR					

MARKET RATE HOUSING

PROPERTY	UNIT TYPE	SIZE (SF)	MONTHLY FEE (LESS UA)	UTILITY ALLOWANCE	PROPOSED MONTHLY FEES PER ONE-STOP (LESS UA)	VACANCY RATE
<u>Benchmark at Robbins Brook</u>	0BR	336	\$5,350	n/a	\$4,400	0%
	1BR	450	\$6,100	n/a	\$5,000	
	2BR	820	\$6,950			
	3BR					
	4BR					

<u>The Commons in Lincoln*</u>	0BR	300	\$6,630	n/a	\$4,000	0%
	1BR	500	\$7,110	n/a	\$5,000	
	2BR	Not avail.	\$8,010			
	3BR					
	4BR					

Concord Park*	0BR	350	\$6,575	n/a	\$4,400	0%
	1BR	525	\$8,525	n/a	\$5,000	
	2BR					
	3BR					
	4BR					

Note: Market rate rents have been adjusted to include personal care to match Subject. *Also includes SAMM.

OTHER ASSISTED/SUBSIDIZED HOUSING						
PROPERTY	UNIT TYPE	SIZE (SF)	RENT (LESS UA)	UTILITY ALLOWANCE	PROPOSED RENTS PER ONE-STOP (LESS UA)	VACANCY RATE
	0BR					0%
	1BR					
	2BR					
	3BR					
	4BR					

	0BR					
	1BR					
	2BR					
	3BR					
	4BR					

	0BR					
	1BR					
	2BR					
	3BR					
	4BR					

Note: Concord Park has some GAFC Units

DEMOGRAPHIC DATA			
YEAR	2010	2017	2022
AREA'S POPULATION	66,452	70,691	73,785
TOTAL HOUSEHOLDS	24,841	26,106	27,184
RENTER HOUSEHOLDS	5,339	6,042	6,262
INCOME and ADL QUALIFIED HH		30%: 167 HH; 60%: 157 HH; 150%: 274 HH	30%: 194; 60%: 169; 150%: 288
MEDIAN INCOME FOR PMA		\$121,418	\$132,278

MARKET DATA						
PROJECT'S PROPOSED TARGET POPULATION	Single persons, over age 75 at various income levels, renters, with 1 or more ADL. Adult Children ages 45-65.					
LOCAL EMPLOYERS IN PMA	INDUSTRY		TYPE OF JOBS AVAILABLE		NUMBER OF EMPLOYEE JOBS	
	Emerson Hospital		Medical, Custodial, Administrative		1,000-4,999	
	Concord Personnel		Advisory, Administrative, Government		500-999	
	Deaconness Abundant Life Community		Medical, Custodial, Administrative		250-499	
New England Deaconness Association		Medical, Custodial, Administrative		250-499		
MINIMUM INCOME NEEDED TO LEASE UNIT BY INCOME % *Note this is based on 12 months rent, not service charges.	UNIT TYPE	30%	50%	60%	MARKET RATE (60%-150% AMI)	
	0BR	\$6,516		\$13,032	\$14,328	
	1BR	\$6,986		\$13,968	\$16,464	
	2BR					
	3BR					
4BR						
CAPTURE RATE BY INCOME % PMA (2022)	30%	4%	50%	60%	9%	MARKET RATE 11%
POTENTIAL ABSORPTION RATE	5 leased at first occupancy, then will lease three to five units per month					
YEAR	2010		CURRENT YEAR (2019)		2022	
UNEMPLOYMENT RATE			2% (October 2019); 13-month average: 2.2%			

West Concord Task Force

Final Report

15 November 2011

Executive Summary

The West Concord Task Force (WCTF) was appointed by the Board of Selectmen after Concord's 2008 Annual Town Meeting to "seek ways to maintain and enhance the village scale and historic identity of West Concord village, improve traffic circulation and public transportation, and protect and promote the enjoyment of natural resources." The goal of the WCTF was to maintain West Concord as a pleasant, lively, and affordable place to live, work, play, shop, and own a business.

In carrying out its charge the Task Force actively sought public input to get to the core of what makes West Concord special. In our surveys, public forums and workshops, it became clear that the appeal of West Concord was due to the confluence of three aspects: a village shopping experience with owner-operated shops and personalized service, an affordable industrial area that serves as a business incubator, and the proximity of natural resources such as Warner Pond and the Assabet River. Our three-year effort sought to support these aspects.

In close collaboration with the Planning Department and Planning Board, we supported the development of the West Concord Village Center Master Plan, a vision for the future with over 60 specific recommendations, and Design Guidelines, non-binding recommendations for the architecture of future development plans as documents. Specific recommendations for prioritized implementation of the Master Plan appear in Appendices A and B, which are letters to the Town Manager. Short-term recommendations are contained in the Appendices and the full suite of recommendations are contained in the Master Plan Implementation Matrix.

We also spearheaded the creation and passage of several zoning articles to preserve and enhance the three main attributes of West Concord. To enhance West Concord's village scale and preserve West Concord's shopping and community experience we amended the zoning bylaws through Town Meeting to create a Village Zoning District to promote first floor retail and intimate scale, and put a cap on the number of formula businesses in West Concord. To support Industrial District vitality, we amended the zoning bylaws to specify criteria for how mixed residential-industrial-business developments are to be approved—with provisions for implementing Master Plan recommendations, considering the Design Guidelines, providing affordable residential and industrial space, and enhancing access to natural resources.

Since the desires of the citizenry were touchstones for consideration, recommendation and action, in our process, we helped West Concord find and channel its voice. We were able to understand what is valued about West Concord, develop recommendations, and rally support for structural change that will serve to maintain and promote the uniqueness of West Concord.

To ensure that West Concord continues to have a channel for its voice, the final recommendation of the Task Force was to charge a West Concord Advisory Committee. The WCAC can be useful in enabling citizen input, creating awareness among Town Boards and Committees on the Master Plan, and providing input on initiatives related to West Concord.

It has been a labor of love helping to ensure West Concord continues to thrive and we, on the Task Force, thank the Board of Selectman for the Opportunity to Serve.

Prior Planning Initiatives

The West Concord Task Force began its work in the summer of 2008 by researching prior planning studies relating to West Concord center, including:

- “Village Center Study” (December 2007) and Village Study Committee Report Appendix A-H (July 2007): The Concord Village Centers Committee (2006–2008) examined three village centers, Concord Center, Thoreau/Depot area and West Concord. The report includes recommendations and highlights common planning themes throughout the centers. Article 37 at Annual Town Meeting 2008 was a follow-on initiative to this committee and study that directly resulted in the formation of the West Concord Task Force.
- “Comprehensive Long Range Plan” (2005): The Town of Concord updates its long-range plan periodically. The previous Comprehensive Long Range was completed in 1974, and a Long Range Plan for Land Use was completed in 1987.
- The West Concord Study Committee’s “Activity Report for Phase One” (November 1992), “Phase II Report: A Comprehensive Guide to Issues and Concerns Affecting the Future of West Concord Center” (July 1993), and “Phase III Report: A Working Document for Planning and Action” (December 1993)
- “Junction Initiative Plan Report” (May 1990), produced for the town of Concord by Wells/Prentiss Partnership
- “Traffic Analysis Program and Circulation Plan: Final Summary Report” (March 1987) produced for the town of Concord by Vanasse Hangen Brustlin, Inc.

The result of this research is that we found a strong sentiment that the community valued the following perceived characteristics of West Concord: small scale, feeling of community, village look, civic spaces, daily-use stores, startups and small independent businesses, historic aspects, walkability, and “funky” character. This research also identified the following planning desires: maintain village scale through zoning, relieve traffic congestion through circulation changes, enhance pedestrian accessibility through setback changes, streetscape improvements and signage.

Major Accomplishments

Over the course of our three years, the WCTF carried out numerous activities. Below is a summary of major accomplishments.

Master Plan: In consultation with the WCTF, Concord’s Planning Division hired Stantec Planning and Landscape Architecture to create a Master Plan for West Concord Village to provide a comprehensive map for the village’s future that addresses traffic, parking, wastewater infrastructure, design guidelines, land use, and natural resources in a single document. Unlike previous studies that established a vision at a macro level, the Master Plan provides specific actionable items with supporting drawings and tangible steps for working with landowners to implement suggested improvements and potential zoning changes. As part of the Master Planning process, two Scenario Building Workshops were conducted during the summer at the Planning Division’s office on Keyes Road. Subsequently, the Task Force coordinated a two-day

West Concord Village Community Design Workshop that was conducted by Stantec on a rainy weekend in September. Despite inclement weather, 230 people attended the two-day workshop, an indication of the importance of the village's future to Concord residents. In October 2010, the WCTF held a public forum for comments on the final version of the Master Plan. Generally, the Master Plan has been well received and is lauded for its breadth and detail. The Master Plan was forwarded to the Planning Department with an addendum reflecting citizens' comments. The WCTF has prioritized several Master Plan items for implementation; see Appendices A and B. The Master Plan can be viewed at the Planning Department and the library, and is on the Town website at: http://www.concordma.gov/pages/ConcordMA_BComm/master_plan

Design Guidelines: One of the components in the Master Plan, also recommended by several previous Town planning efforts, is a set of design guidelines for the West Concord Business and Industrial districts. Although they are non-binding and do not have the force of law as zoning bylaws do, design guidelines provide property and business owners with guidance on what the community would prefer. Compliance with the guidelines could simplify the review/permitting process for applications submitted to the Planning Board or Zoning Board of Appeals. In consultation with the Planning Board, the WCTF, and the Master Plan consultant, the Planning Division prepared a set of design guidelines that were sent to the Planning Board for their review and adoption in the Spring of 2010. The Design Guidelines can be viewed at the Planning Department and the library, and are on the Town website at: http://www.concordma.gov/Pages/ConcordMA_Planning/WCVC_DESIGN_GUIDELINES_%20FINAL_%20July_%202011.pdf

Zoning Bylaw changes: A significant effort of the WCTF was to review the Zoning Bylaw in light of the Master Plan recommendations and considerable input from citizens, merchants and property owners, and to assist the Planning Department and the Planning Board in bringing articles before Town Meeting. At Annual Town Meeting 2010, the voters approved the separation of Concord's Business and Industrial districts into distinct districts including a West Concord Business district and West Concord Industrial district. At Annual Town Meeting 2011 and at a Special Town Meeting within that meeting, the voters established a West Concord Village district created from a portion of the West Concord Business district, and approved various changes in the West Concord Village, West Concord Business, and West Concord Industrial districts involving building height and setback requirements, ground floor uses, store size limits, and formula business regulation, all with the intention of encouraging a lively retail streetscape and active business and industrial districts which will be conducive to a strong commercial base, a tight-knit community, and sustainable development. Articles passed at Town Meeting and specifically affecting West Concord center were ATM 2010 article 44, ATM 2011 articles 36, 50, 52, 53, and 54, and STM 2011 articles S3, S4, S5, and S6. Information about these articles may be found in the Town Meeting section of the Town's Annual Reports.

WC-IPOD: As we began our work, the WCTF pursued a zoning bylaw amendment known as the West Concord Interim Planning Overlay District (WC-IPOD), which was approved by the voters at Annual Town Meeting 2009. The WC-IPOD provided a temporary mechanism to oversee land use changes during the development of the Master Plan. As a partial brake on development rather than a complete moratorium, it balanced the needs of the community to allow time for planning with the needs of property owners and business people to carry out their affairs. Having fulfilled its purpose, it expired automatically at the end of Annual Town Meeting 2011. See ATM 2009 Article 38.

Public Surveys: The WCTF created a survey asking what Concord residents want to protect, prevent, and change about West Concord. Between November, 2008 and February, 2009, two hundred surveys were returned. The feedback was analyzed, with a report published in August 2009. Additionally, Stantec conducted a Visual Preference Survey as part of the Master Planning process during September and October 2009. Results from both surveys contributed toward content in the Master Plan. A summary of these findings is included in Appendix 3 of the Master Plan.

Public Outreach

The West Concord Task Force came into existence in part because of confusion and uncertainty after the change of ownership of several large commercial properties in the village center, when the center had experienced little turnover for many years. Additionally, many residents expressed concern that West Concord issues had sometimes been overlooked within the larger town-wide planning agenda. The WCTF considered it a major and necessary component of our work to keep the public informed, to listen to the public, and to take public input into account. All West Concord Task Force meetings were open to the public by law; the WCTF held meetings approximately bi-weekly over the majority of its tenure. In addition, the WCTF conducted public forums before each Town Meeting to publicize and explain warrant articles relating to West Concord center and to collect feedback. We conducted forums for the Master Plan and Design Guidelines as well. Most forums drew over one hundred attendees. We published occasional guest commentaries and letters in the Concord Journal, contacted the Concord Journal to suggest the presence of a reporter at important events, arranged with CCTV (our local cable channel) to tape and broadcast important events, created a Yahoo Group email list, made use of CCTV to announce meetings and other relevant events, and posted notices in public locations. We conducted a public survey that helped to inform the Master Plan. We are proud of the support the WCTF has received from town government, citizens, business owners, and property owners as a result of this outreach, culminating in a positive reception for the Master Plan, the Design Guidelines, and Town Meeting warrant articles.

Recommendations

The West Concord Task Force recommends that the Town of Concord make use of the West Concord Master Plan and West Concord Design Guidelines. Specific recommendations for prioritized implementation of the Master Plan appear in Appendices A and B, which are letters to the Town Manager. In addition to the short-term recommendations contained in the Appendices and the full suite of recommendations contained in the Master Plan Implementation Matrix, the WCTF further recommended the creation of a West Concord Advisory Committee to assist the Town in making use of these documents into the future.

Master Plan

The WCTF recommends that the Town be guided in its initiatives by the West Concord Master Plan benefiting from the detailed and careful work provided by the Master Planning firm Stantec, the Planning Department, the West Concord Task Force, and the hundreds of Concord citizens who attended meetings, forums, and workshops, provided ideas, and gave feedback. **We urge Town departments and committees, and all citizens, to keep the Master Plan in mind while planning changes in West Concord center, and to seek opportunities to implement the Master Plan's action items.**

The Implementation Matrix on pp. 5-23.1 through 5-23.4 of the Master Plan lists all implementation items in a table where the “Project Assist” column identifies town departments and committees who would assist in implementing the item. We recommend that departments and committees review the table periodically to see whether and how they could incorporate implementation items into their work.

The Master Plan should be a living document that grows and changes along with Concord.

Design Guidelines

We recommend that the Planning Board make use of the Design Guidelines and that applicants for building permits, site plan review, special permits, and any other relevant approvals be introduced to the Design Guidelines. Applicants can use the Design Guidelines to produce plans that meet approval with fewer changes, speeding up the permitting process to the benefit of both applicants and review boards. The assistance of a West Concord advisory committee in navigating the Design Guidelines may be particularly useful both to applicants and to review boards. In addition, design guidelines may provide a future basis for form-based code, a zoning tool with regulatory force that might be useful to the Planning Board and the Planning Department in the future.

West Concord Advisory Committee

The Master Plan recommends the creation of a West Concord advisory committee, and a majority of the WCTF voted to recommend that such a committee be created to assist the town in implementing Master Plan action items and in making use of the West Concord Design Guidelines. In May, 2011, the WCTF delivered a draft charge for a WCAC to the Board of Selectmen for their consideration. The Board of Selectmen recommended that such a committee be created as a subcommittee of the Planning Board. The Planning Board approved a charge for the committee in August, 2011, and is in the process of seeking nominees.

Membership

The members of the WCTF are: Phil Adams, chair; Nancy Carey, clerk; Bobbie Brennan, Gary Clayton, Sue Felshin, Don Hawley, David Holdorf, Gary Kleiman, Chris Sgarzi, and Jimi Two Feathers. Former members are Susan Close, Dan Holin (chair), Meg Gaudet, Roz Greenstein, Matt Johnson, Chris Ryan, and Betsy Stokey (vice chair); ex officio: Greg Howes and Chris Whelan. WCTF members may be useful resources for future initiatives on lessons learned for topics such as public outreach strategies, preparation for Town Meeting issues related to zoning, etc.

Acknowledgements

The West Concord Task Force thanks the Board of Selectmen and the citizens of Concord for the opportunity to serve our town. We thank the citizens who provided the WCTF with thoughtful, insightful, and heartfelt input at public meetings and forums, and who contributed to the Master Plan. Several Town residents involved in past West Concord planning efforts and activities were particularly helpful in providing their expertise, assistance, and labor. The staff of the Planning Department were helpful in providing support, including performing research, drafting zoning bylaw amendments, drafting the Design Guidelines, and managing the Master Planning process

including reviewing the Master Plan; Planning Director Marcia Rasmussen attended many evening meetings and was helpful in providing her expertise and experience. We thank our Selectmen liaison, Greg Howes, Town Manager Chris Whelan, and Administrative Assistant to the Board of Selectmen Ruth Lauer.

A Suggestion on Communications

If Town resources allow, it would be helpful to expand the existing Town of Concord email news feeds (see <http://www.concordma.gov/Subscriber>) to allow any Town committee to create and manage an email announcement list. The Yahoo Groups list used by the WCTF had the advantage of being free, but it was difficult to maintain, and some citizens found that they were unable to subscribe or failed to receive emails after subscribing.

Appendix: List of Exhibits

1. Charge: Concord, MA - West Concord Task Force Charge.pdf
2. Agendas and Minutes for meetings
 - 2008: July 22 and 30; Sept. 2 and 16; Oct. 1, 15, and 29; Nov. 5, 12, and 19; Dec. 2, 10, and 16. No minutes: Walking tour of West Concord, Sept. 21, 2008.
 - 2009: Jan. 14; Feb 2 and 26; Mar. 17; Apr. 22; May 11 and 27; June 8 and 29; July 23; Aug. 25 and 28; Sept. 9 and 30; Oct. 13; Nov. 30; Dec. 14 and 22.
 - 2010: Jan. 7 and 19; Feb. 4; Mar. 18; Apr. 1, 12, and 26; May 4; July 22; Aug. 5 and 19; Sept 2, 16, 23, and 30; Oct. 14 and 28; Nov. 10 and 17; Dec. 2 and 8.
 - 2011: Jan. 1 and 20; Feb. 2 and 15; Mar. 17 and 31; Apr. 21; May 12; June 28; Oct. 6
3. Reports
 - Reports to Board of Selectmen (see also under “Correspondence sent”):
 - Nov. 13, 2008, progress report presented 17 Nov 2008: WCTF-prog-rpt-to-BoS-2008-11-13-submitted.doc
 - May 23, 2011, progress report and draft charge for West Concord Advisory Committee, WCTF Progress report and WCAC charge cover letter 2011 05 23.doc and Draft WCAC Charge 2011 05 23.doc
 - Annual Town Report submissions: see Annual Town Reports of 2008, 2009, 2010, 2011
 - August 2009, West Concord Task Force Public Survey Final Report: survey_report_09.03.2009.pdf
 - West Concord Industrial Areas Retreat Summary Report, June 2010, prepared by Eaton Planning: WCTF_June2010_Workshop_Report.pdf
 - West Concord Master Plan, Apr. 19, 2010, prepared by Stantec Planning and Landscape Architecture; available from the Planning Department and at http://www.concordma.gov/pages/ConcordMA_BComm/master_plan
 - July 2011, West Concord Design Guidelines, prepared by the Planning Department; available from the Planning Department and at http://www.concordma.gov/Pages/ConcordMA_Planning/WCVC_DESIGN_GUIDELINES_%20FINAL_%20July_%202011.pdf
4. Presentations at public forums & workshops
 - Nov. 17, 2008, Interim update for the Concord Board of Selectmen: WCTF-pres-to-BoS-2008-11-17-final.ppt
 - Mar. 25, 2009, Town Meeting public information forum (see also following item)
 - Apr. 7, 2009, Town Meeting public information forum, repeat of previous, 2009.04.07 WCTF presentation 3-31.ppt
 - June 16, 2009, public forum on Design Guidelines: 2009 06 11 Design Guidelines - REVISED.ppt
 - July 23, 2009, Master Plan scenario building workshop: see under “Maps”
 - Sept. 11 & 12, 2009, West Concord Village Community Workshops

- Nov. 19, 2009, Master Plan Public Information Forum, 2009.11.19 WCTF presentation.pdf
- Apr. 8, 2010, Balancing Independent and Formula Businesses in West Concord Village Center public forum, 2010.04.01 Warrant Article 46.ppt
- Sept. 25, 2010, Industrial District workshop, Industrial_Retreat_Final Deck_2010_09_19.pdf and 100925_Forum_FINAL.pdf
- Oct. 5, 2010, public forum for Master Plan comments on final draft
- Nov. 16, 2010, West Concord Task Force Zoning Forum, Zoning Forum Overview 2010 11 16 part 1.ppt and Zoning Forum Overview 2010 11 16 part 2.ppt
- Apr. 5, 2011, West Concord Task Force Public Forum on Town Meeting articles related to West Concord: WCTF_Forum_2011_04_04_Finalv2.ppt
- April 27, 2011, Town Meeting presentation on articles related to West Concord, P5 Town Meeting 2011 04 25.ppt

5. Other presentations

- Nov. 17, 2008, presentation to Board of Selectmen: WCTF-pres-to-BoS-2008-11-17-final.ppt
- Nov. 9, 2010, presentation to Planning Board, Planning Board 2010 11 09.ppt
- March 2, 2011, presentation to Concord Business Partnership, CBP Breakfast 2011 03 02 draft.ppt
- April 27, 2011, presentation at Town Meeting, TM 2011 04 27 WCTF Intro Final.ppt
- June 6, 2011, oral presentation to Board of Selectmen

6. FAQs and handouts

- Apr. 24, 2009, FAQ re Article 38: West Concord Interim Planning Overlay District for Town Meeting: Art38WC-IPODfactsheet4-24-09.pdf
- June 16, 2009, factsheet on West Concord Design Guidelines for June 16, 2009 public forum: DGfactsheet061609_forum2.doc
- Apr. 28, 2010, Article 44: West Concord Business District and West Concord Industrial District and Article 46: Formula Business Bylaw: Articles44&46FAQFinal-2010-04-28.pdf
- Mar. 31, 2011, FAQ for Town Meeting: WCTF_FAQ_Final-2011-04-01.pdf

7. Flyers

- Mar. 18, 2009 for Mar. 25 & Apr. 7 forums: The Future of West Concord-2009-03-18.pdf
- June 6, 2009 for June 16 forum: public-forum-flyer-design-guidelines-2009-06-09.pdf
- Aug. 24, 2009, multi-purpose flyer inviting public to various meetings and workshops: WCTFFlyer8.24.09.pdf
- Sept. 8, 2009 for Sept. 11&12 workshop: The future of West Concord Village is NOW 09.08.09.pdf
- Nov. 13, 2009 for Nov. 19 forum: WCTF-Nov-11.19.09-flyer-v4.pdf
- Mar. 26, 2010 for Apr. 8 forum: WCTF Public Forum Flyer04.08.10Final.pdf
- Sept. 28, 2010 for Oct. 5 forum: WCTF MasterPlanForum flyer 10-5-2010.pdf
- Nov. 11, 2010 for Nov. 16 forum: WCTF Zoning Forum flyer 11-16-2010 v 2.pdf
- Mar. 20, 2011 for Apr. 5 forum: WCTF Forum flyer 2011-04-05-v5.pdf

- Apr. 21, 2011 advertising Town Meeting: TM-flyer-2011-04-21-v2.pdf

8. Concord Journal submissions

- December 11, 2008, Task Force supports shopping locally, WCTF, CJ-2008-12-08.pdf
- March 19, 2009, “Survey offers info on West Concord”, Sue Felshin and Jimi Two Feathers, CJ-2009-03-19.pdf
- April 16, 2009, “Keeping it real in West Concord”, Dan Holin, CJ-2009-04.pdf
- June 4, 2009, “IPOD for all”, WCTF/Dan Holin, CJ-2009-06-04.pdf
- June 11, 2009, “What should West Concord look like?”, David Holdorf, CJ-2009-06-11.txt
- August 27, 2009, “Now it's time to hear from you again”, Jimi Two Feathers, CJ-2009-08-27.pdf
- November 12, 2009, “Hear about the master plan”, David Holdorf, CJ-2009-11-12.pdf
- February 11, 2010, “Q&A: proposed zoning by law”, WCTF, CJ-2010-02-11.pdf
- February 25, 2010, “Task Force supports Article 46”, WCTF, CJ-2010-02-25.pdf
- March 2010, “Ensuring the Village's future”, Dan Holin, CJ-2010-03.pdf
- April 22, 2010, “Changes to Article 46”, WCTF, CJ-2010-04-22.pdf
- May 20, 2010, “WCTF thankful for support”, Dan Holin/WCTF, CJ-2010-05-20.pdf
- September 2010, “Workshop a success”, Dan Holin, CJ-2010-09.pdf
- September 24, 2010, “The continuing effort to shape West Concord”, CJ-2010-09-24.rtf
- September 30, 2010, “Final review for the Master Plan”, WCTF, CJ-2010-09-30.pdf
- December 2, 2010, “Task force presents its proposals”, WCTF, CJ-2010-12-02.pdf
- March 31, 2011, “West Concord's future is now”, WCTF, CJ-2011-03-31.pdf
- April 14, 2011, “Support articles related to West Concord”: CJ-2011-04-14.pdf

9. Correspondence sent

- January 28, 2009, letter to landowners re West Concord Master Plan and proposed interim planning overlay district: Letter2Owners_WCIPOD_B.doc
- March 20, 2009, memo to Board of Selectmen regarding the WCTF 2009 Work plan: BOS WCTF work plan 2009FINAL.doc
- June 8, 2009, letter to landowners re West Concord Design Guidelines and Master Plan: Ltr2Owners_DesignGuide_060809.doc
- June 29, 2009, memo to Planning Board , Zoning Board of Appeals, and Natural Resources Commission re proposal for 1135 Main St. (Dee Bus): Final 1135 Main St. memo.doc
- December 9, 2009, letter to Ross Hamlin: WCTF_Ltr2RHamlin.pdf
- December 16, 2009, packet of information on formula business bylaws sent to Town Counsel: Legality of FBRs final.pdf
- January 21, 2010, letter to business and commercial property owners re proposed zoning bylaw changes: Ltr to W.C. Owners 1 21 10.doc

- January 21, 2010, letter to Concord Business Partnership re proposed zoning bylaw changes: Ltr to CBPetal 1 21 10.doc
- January 21, 2010, letter to Concord Chamber of Commerce re proposed zoning bylaw changes: Ltr to CCoCetal 1 21 10.doc
- May 26, 2010, invitation to stakeholders to industrial district ‘retreat’ of June 19, 2010: 2010 05 26 Invite letter_final.doc
- September 10, 2010, invitation to stakeholders to West Concord Industrial District workshop of Sept. 25, 2010: 2010 09 10 Invite letter.doc
- August 3, 2010, letter to the Town Manager regarding short-term streetscape improvements, with attachment, “West Concord Village Master Plan – Short-Term Streetscape Improvements”: WCTF_Short-Term_Master_Plan_Streetscape_Improvements_Cover.pdf and WCTF_Short-Term_Master_Plan_Streetscape_Improvements_V7.doc
- September 16, 2010, letter from John Boynton re West Concord industrial zoning, Bradford Mil - Zoning Priorities v2.pdf
- December 9, 2010, letter to Planning Board re zoning proposals, PBCoverLetter12.09.10.doc, WCTFzoningproposal 12.09.10.doc, and WCTF zoning proposal 12-9-10 table.xls
- January 5, 2011, letter to the Town Manager regarding capital expenditure priorities. Please note a mistaken address in item (3), which should be is 138 Commonwealth Ave. (parcel 2184-1-2). The WCTF recommends acquisition of a portion of this property for the purpose of reconnecting Beharrell St. to Commonwealth Ave. but does not see any compelling reason for the Town to retain ownership of the entire property. WCTF Capital Priorities 2011 01 06.doc
- January 14, 2011, invitation to West Concord Industrial District property owners to WCTF meeting of January 20, 2011 regarding proposed zoning bylaw changes: 2011 01 14 Invite letter.doc
- March 17, 2011, invitation to business and property owners to WCTF public forum of April 5, 2011 and joint Board of Selectmen, Finance Committee, and Planning Board public hearing of April 12, 2011, re proposed zoning bylaw changes: AprilForum_BusPropOwners.pdf
- July 7, 2011, letter from chair to BoS liaison, Adams to Howes after June 28 WCTF meeting.rtf

10. Correspondence received

- August 6, 2008, invitation to Wastewater Planning Task Force outreach meeting of Aug. 26, 2008: OutreachInviteAug08.pdf
- August 18, 2008, letter from Joanne Loynd, letter-from-Joanne-Loynd-Aug-18-2008.rtf
- August 29, 2008, memo from Department of Planning and Land Management regarding Summary if West Concord Study Committee Report Phase III: Summary W Concord Study Phase III 1993.doc
- September 10, 2008, MassHighway Public Workshop #2 for the Route 2 Concord Rotary Reconstruction Project for September 24, 2008, forwarded by Administrative Assistant to the Board of Selectmen Ruth Lauer: MHD Rt2 Concord Rotary workshop #2 notice_fnl 1.pdf

- October 10, 2008, memo from Department of Planning and Land Management to Real Estate Subcommittee regarding zoning, land use and dimensional requirements: LandUse_ZoningMemo.pdf
- November 8, 2008, letter from Dorrie Kehoe: Task_Force_comments.doc
- November 9, 2008, letter from Joanne Loynd: letter-from-Joanne-Loynd.doc
- January 12, 2009, letter of resignation from Chris Ryan, Chris Ryan Resignation Letter.doc
- March 4, 2009, invitation to Wastewater Planning Task Force March 18, 2009 presentation: wastewater planning task force march 18 PWC 2009 1.pdf
- April 13, 2009: memo re pedestrian footbridge, forwarded by Administrative Assistant to the Board of Selectmen Ruth Lauer: Assabet-footbridge-Apr09 (3).doc
- June 2, 2009, letter from Hany Teylouni and response from Chair: Response to Hany Teylouni.doc
- August 7, 2009, letter from Ted Brovitz forwarding letter from Dorrie Kehoe: letter from Dorrie Kehoe-7-Aug-2009.doc
- November 15, 2009, letter re parking meters forwarded by Administrative Assistant to the Board of Selectmen Ruth Lauer: WC parking.pdf
- November 24, 2009, letter from Kati Winchell, 11_24_09_Mtg_Kati_Winchell.rtf
- December 7, 2009, letter of resignation from Susan Close, Susan Close resignation.rtf
- December 9, 2009, letter from Chris Sgarzi forwarding letter from Dorrie Kehoe: letter from Dorrie Kehoe-9-Dec-2009.doc
- February 2, 2010, letter from Town Manager Chris Whelan, FW_DOC Land for Housing.rtf
- March 29, 2010, letter from Nancy Carey to Board of Selectmen, Fw_To BOS_Point of Clarification.rtf
- April 5, 2010, memo from Bill Gluck and Ray Hanselman to Town Moderator, cc WCTF, re Articles 41 and 49: Articles 41and49 032910.pdf
- April 6, 2010, memo from Bill Gluck and Ray Hanselman to Planning Board, cc WCTF, re Articles 41 and 49: Planning Board 040610.pdf
- April 26, 2010, memo from Matt Johnson, E-mail from Matt Johnson to BOS cc PB and WCTF.rtf
- May 12, 2010, informational letter from prospective committee member Phil Adams, Fw_Phil Adams.rtf
- May 13, 2010, informational letter from prospective committee member Gary Kleiman, Re_Gary Kleiman.rtf
- May 21, 2010, letter of resignation from Meg Gaudet, Meg Gaudet Resignation Letter.doc
- June 1, 2010, letter from Ruth Lauer forwarding reminder of June 9 Community Workshop on Concord's Affordable Housing Needs, Workshop on Affordable Housing Needs.rtf
- June 3, 2010, informational letter and green card from prospective committee member Bobbie Brennan, Bobbie Brennan's_green card.rtf
- June 24, 2010, green card of prospective committee member Don Hawley, Green card from Don Hawley.rtf

- July 10, 2010, letter from Nancy Carey re Joanne Loynd, Sad news re_ Joanne Loynd.rtf
- August 13, 2010, letter of resignation from Matt Johnson, Matt Johnson resignation.rtf
- September 17, 2010, letter of resignation from Dan Holin, Dan Holin_Resignation Letter.rtf
- October 2, 2010, letter from L. Michelle Touw re Kenneth Dunn Square, Touw-SKMBT_50010100412321.pdf
- October 5, 2010, letter from Anne Fortier re Kenneth Dunn Square, Fortier-SKMBT_50010100412321.pdf
- October 5, 2010, letter from Karrs re Kenneth Dunn Square, Karr-SKMBT_50010100412321.pdf
- October 5, 2010, letter from Bill Satterthwaite re Kenneth Dunn Square, 10-10-5 to West Concord Task Force about Roundabout.pdf
- October 5, 2010, letter from Sallie Satterthwaite re Kenneth Dunn Square, 10-10-5 to West Concord Task Force about Roundabout-2.pdf
- December 2, 2010, letter from Betsy Higgins: 2010-12-02-letter-from-Betsy-Higgins.pdf
- March 1, 2011, letter of resignation from Betsy Stokey, Betsy Stokey resignation.doc
- September 12, 2011, revised WCAC charge from Planning Board, PB-SKMBT_50011091214490.pdf
- September 2, 2011, letter from Dorrie Kehoe: Response to Phil Adams.doc

11. Maps

- July 23, 2009, maps for Master Plan scenario building workshop, prepared by Stantec: WC Section and Transect A Comm Ave.pdf, WC Section and Transect B Comm Ave.pdf, WC Section and Transect F Main St.pdf
- August 24, 2009, natural resources and potential POSTs (parks, open spaces, and trails): WC Resource Areas and POST_BS_8-24-09.pdf

17-0

**TOWN OF CONCORD
 BOARD OF APPEALS**

THE BOARD OF APPEALS CERTIFIES as follows:

Name and Address of Owner: Concord Housing Development Corporation
PO Box 195
Concord, MA 01742

Property Identification: 6X Winthrop Street
Concord, MA 01742
D61102/485

This application filed on December 1, 2016 and all subsequent proceedings comply with the requirements of General Laws, Chapter 40A.

An appeal from this decision shall be made pursuant to General Laws, Chapter 40A, Section 17, and shall be filed within twenty (20) days after the date of filing such decision or notice thereof in the office of the Town Clerk.

[Signature]
 Signature

Stewart T. Froeland
 Print

[Signature]
 Signature

Robert Sepulveda
 Print

[Signature]
 Signature

Elizabeth Arnhurst-Moore
 Print

I, Patricia Clifford, Acting Town Clerk for the Town of Concord, hereby do certify that this is a true copy of the Board of Appeals Decision.

[Signature]
 Patricia Clifford, Acting Town Clerk

MAY 12 2017
 Date

I, Patricia Clifford, Acting Town Clerk for the Town of Concord, hereby certify that twenty (20) days have elapsed since the filing of this decision and no appeal has been filed, or, if filed, has been dismissed or denied.

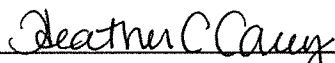
[Signature] Assistant
 Patricia Clifford, Acting Town Clerk Date

JUN - 2 2017

Geantham Group
 c/o Catherine Malborough
 99 Pleasant St
 Melborough MA 01752

TOWN OF CONCORD
ZONING BOARD OF APPEALS
TOWN HOUSE

Please take notice that in the matter of the APPLICATION OF THE GRANTHAM GROUP LLC, for a Comprehensive Permit under M.G.L. Chapter 40B with waivers to the Town of Concord Zoning Bylaws for an 83-unit affordable assisted living facility at 6X Winthrop Street, Concord, Massachusetts (Parcel #2013-1), the Zoning Board of Appeals has this day rendered a decision GRANTING said application, and the record therein has this day been filed with the Town Clerk, Town House, Concord, Massachusetts. Appeals, if any, shall be made pursuant to Section 17 of the Zoning Act, Chapter 40A of the Massachusetts General Laws, and shall be filed within 20 days after the date of this notice.



Heather Carey, Administrative Assistant
ZONING BOARD OF APPEALS

5/12/17
DATE

TOWN OF CONCORD

BOARD OF APPEALS

DECISION of the Zoning Board of Appeals (the Board) on the application of THE GRANTHAM GROUP LLC, for a Comprehensive Permit under M.G.L. Chapter 40B with waivers from the Town of Concord Zoning Bylaws for an 83-unit affordable assisted living facility at 6X Winthrop Street, Concord, Massachusetts (Parcel #2013-1).

This decision is in response to an application filed on December 1, 2016. After causing notice of the time and place of the public hearing and of the subject matter thereof to be published in *The Concord Journal* on December 29, 2016 and January 5, 2017, posted and mailed to the Applicant, abutters and other parties of interest as required by law, the public hearing was opened on January 12th and continued to February 9th, March 23rd and April 13th.

After deliberation and weighing of all the evidence before it, the Board voted 3 to 0 (Sepucha, Freeland, Akehurst-Moore) to **GRANT** approval of the Comprehensive Permit with waivers and conditions based on the following:

I. Existing Conditions

The Site is a 6.1 acre portion of a larger 12.8 acre property that is undeveloped vacant land with a predominantly gravel surface covered by non-native invasive grasses and scrub brush vegetation. The 6.1 acre Site is generally flat and does not contain any significant specimen trees. The Site is located outside of the Wetland Conservancy District and 200-foot Riverfront area for the Assabet River to the east. The property is bounded on the south by the Nashoba Brook and contains wetlands, 100-year floodplain and riverfront area. At the northern edge of the property there is an existing gravel road from Commonwealth Avenue used by MCI-Concord to gain access around the southern portion of the prison that extends across a portion of the property. The western side of the property is bounded by the Bruce Freeman Rail Trail (BFRT).

II. Proposed Project

The Applicant, The Grantham Group LLC, is seeking a Comprehensive Permit under M.G.L. Chapter 40B through the State's Low Income Housing Tax Credit Program (LIHTC) to develop an 83-unit assisted living facility. The Project will have 17 units restricted for occupants who earn less than 30% Area Median Income (AMI) and 26 units restricted for occupants earning less than 60% AMI (collectively the "Low Income units"), and 40 units restricted for occupants earning less than 150% AMI (the "Moderate units"). The Applicant has agreed to support expanding the Local Preference to allow for 30 of the 43 Low Income units and 28 of the 40 Moderate income units to be set aside for a local preference.

The Project will consist of a single approximately 54,000 square foot (sf.) 3-story building (the "Building"). The Building will contain community and administrative space, country kitchen, the central kitchen and food preparation areas, a lobby living room and

fireplace, a library, activity room, pub area and beauty parlor. The 83 units will be comprised of 71 studio/alcove apartments averaging 330 sf. and 12 one bedroom apartments averaging 525 sf. Each unit will contain a galley kitchen with a microwave oven, sink and refrigerator as well as individual bathrooms with life safety and emergency call systems.

The Site does not have any frontage on an existing public or private way. The Applicant is proposing a new access driveway from the terminus of Winthrop Street over the BFRT. The property owner has obtained a right-of-way easement across the BFRT from the Massachusetts Department of Transportation (MassDOT). The driveway into the Site will be 22 feet wide and end in a turnaround in front of the Building. There are two parking areas with a total of 43 spaces. The Applicant is proposing an emergency vehicle access from Elm Place, adjacent to the MCI-Concord prison to the north side of the Building. A portion of the driveway and associated stormwater drainage areas are within the 100-year floodplain for which the Applicant is proposing compensatory flood storage.

The Applicant has prepared a Site Planting Plan that incorporates vegetation and plantings, a patio seating area facing the Assabet River, and landscaping screening elements along the northern boundary. The Site Planting Plan incorporates a walking trail on the land adjacent to the Assabet River. This conceptual plan was developed in collaboration with the Applicant, Town staff, Concord Land Trust, Sudbury Valley Trustees, a member of the West Concord Advisory Committee and the property owner, Concord Housing Development Corporation (CHDC). The CHDC has agreed that the area outside the Applicant's lease area will be put into a permanent Conservation Restriction. The Applicant has agreed to provide in-kind services for invasive species removal, clean-up and grading for this walking trail as is more particularly set forth herein.

III. Requested Waivers

Principal Uses Industrial Park A Zoning District

An assisted living facility is not permitted in the Industrial Park A Zoning District. The Applicant is requesting a waiver to permit this use. The Board **GRANTS** this waiver.

Minimum Lot Frontage

The minimum required frontage on an existing public way is 200 feet. The lot does not have any frontage on a public street. The Applicant is requesting a waiver from this requirement. The Board **GRANTS** this waiver.

Table III Dimensional Regulations

The maximum permitted height in the Industrial Park A Zoning District is 40 feet measured to the mean average finished grade between the plate and the ridge of a pitched roof for each side. The Applicant is requesting a waiver to allow a height of 42.5 feet. The Board **GRANTS** this waiver.

IV. Required Findings

In reaching its decision, the Board reviewed the application, supporting material and studies, plans, Town Planner's report, Town's outside consultant reports, comments received by Town staff, various letters and statements submitted by residents, the Planning Board's recommendation dated April 12, 2017 and the requirements pursuant to M.G.L. Ch. 40B and 760 CMR 56.

The Board discussed, amended and adopted the conditions recommended by the Planning Board, and determined that development of the project would not endanger public health, safety or welfare; would not impair critically-needed open space; would not be out of character in terms of density, scale and building design in relation to surrounding developments; and would be consistent with local needs in view of the ongoing need for low and moderate income housing for the elderly.

The Board considered the statutory minimum requirements for affordable housing set forth in M.G.L. Ch. 40B and acknowledged that the Town has met these requirements. However, the Board also acknowledged that the Town is supportive of continuing to add affordable assisted living units to the housing stock, and that the subject property was identified as appropriate for affordable housing within the Town's 2015 Housing Production Plan.

The Board also recognized that the DHCD Letter of Determination of Project Eligibility under the Low Income Housing Tax Credit (LIHTC) program, dated August 18, 2016, states the following:

1. The proposed project appears generally eligible under the requirements of the Low Income Housing Tax Credit program.
2. The site of the proposed project is an appropriate location for the project.
3. The proposed housing design is appropriate for the site.
4. The proposed project appears financially feasible in the context of the Concord housing market.
5. The initial *proforma* for the project appears financially feasible and consistent with the requirements for cost examination and limitations on profits on the basis of estimated development and operating costs.
6. A third-party appraisal has been commissioned. The LIHTC Program Guidelines state that the allowable acquisition value of a site with a comprehensive permit must be equal to or less than the value under pre-existing zoning, plus reasonable carrying costs.
7. The ownership entity will be a single-purpose entity, controlled by the Applicant subject to limited dividend requirements and to meet the general eligibility standards of the LIHTC Program.
8. The Applicant controls the Site.

The Board has adopted the following conditions of approval:

1) Approval is based on the following plans prepared for a Comprehensive Permit at 1257 Elm Street:

Fuss & O'Neill, 78 Interstate Dr., West Springfield, MA 01089:

- a. C0.00 Cover Sheet dated March 1, 2017;
- b. C1.00 Existing Conditions Plan dated November 16, 2016;
- c. C1.01 Lease Area Plan dated April 28, 2017;
- d. C1.10 Site Preparation and Erosion & Sediment Control Plan dated February 17, 2017;
- e. C1.20 Site Layout Plan dated March 1, 2017;
- f. C1.30 Site Grading & Drainage Plan dated March 1, 2017;
- g. C1.40 Site Utility Plan dated March 1, 2017;
- h. C3.00 Erosion & Sediment Control Details Plan dated November 16, 2016;
- i. C3.10 Construction Details Plan dated February 17, 2017;
- j. C3.20 & C3.30 Construction Details Plan dated November 16, 2016;
- k. C3.30 Construction Details Plan dated March 23, 2017;
- l. C3.40 Construction Details Plan dated February 17, 2017;
- m. C3.50 to C3.80 Construction Details Plan dated November 16, 2016;
- n. L1.10 Site Planting Plan dated March 23, 2017;
- o. L1.20 Planting Plan Enlargement & Details Plan dated November 16, 2016

Smook Architecture & Urban Design, Inc., 8 Lyman St., Suite 206, Westborough, MA 01581:

- p. A0.0 Existing Conditions Photo & Locus Plan dated November 14, 2016;
- q. A0.1 Locus Plan & Building Views Plan dated November 14, 2016;
- r. A0.2 Drawing List, Abbreviations & Code Summary Plan dated November 14, 2016;
- s. A1.0 Basement Floor Plan dated November 14, 2016;
- t. A1.1 First Floor Plan dated November 14, 2016;
- u. A1.2 Second Floor Plan dated November 14, 2016;
- v. A1.3 Third Floor Plan dated November 14, 2016;
- w. A1.4 Roof Plan dated November 14, 2016;
- x. A1.5 Enlarged Unit Plan dated November 14, 2016;

- y. A3.1 & A3.2 Exterior Elevations Plan dated November 14, 2016;
 - z. A3.3 Partial Exterior Elevations dated November 14, 2016;
 - aa. A4.1 to A4.5 Wall Sections Plan dated November 14, 2016.
- 2) The Applicant shall notify the Board in writing of any proposed change to the Project which the Building Inspections Division determines to be material, and if the Board determines that the change is substantial, it shall require a public hearing and modification of this Comprehensive Permit by the Board, as set forth in 760 CMR 56.05(11). Any such change that the Board determines to be insubstantial shall be incorporated into this decision by reference.
 - 3) The Applicant has agreed to provide \$25,000 of in-kind services for invasive species removal, clean-up and grading of a walking trail within the area to be placed in a permanent Conservation Restriction and connecting to the BFRT.
 - 4) The Applicant will allow for investigation of federal, state or philanthropic funding opportunities related to sustainable, low-carbon design features in order to offset any added expense that the project would incur as a result of incorporating such features. The inclusion of such features will not require further amendment to the Comprehensive Permit, if such funds/programs are identified.
 - 5) The pedestrian sidewalk/path along the driveway and from the BFRT across the natural meadow to the walking path within the Conservation Restriction area shall be open to the general public. The Applicant has agreed to maintain and mow the meadow area.
 - 6) The Applicant shall abide by the terms of the Memorandum of Agreement executed by the Applicant, the Concord Housing Development Corporation (the Property Owner), and the Town on April 11, 2017.
 - 7) The development shall be limited to eighty three (83) assisted living rental units, comprised of 71 studio/alcove apartments and 12 one bedroom apartments. Seventeen (17) units shall be restricted for occupants who earn less than 30% Area Median Income (AMI) and twenty-six (26) units restricted for occupants earning less than 60% AMI (the "Low Income Units"). Forty (40) units shall be restricted for occupants earning less than 150% AMI (the "Moderate Units"). Income shall be adjusted for household size, as published by the Massachusetts Department of Housing and Community Development (DHCD). All units shall be restricted in perpetuity.
 - 8) The Developer shall construct and make available for rent 51% of the unit square footage at Low Income and 49% of the unit square footage at Moderate Income.
 - 9) The Comprehensive Permit is subject to all conditions imposed on the project by the Department of Housing & Community Development (DHCD). Any changes to the application, including but not limited to alterations in unit mix, rental price, development team, unit design, site plan and financial *proforma* reflecting land value, must be approved by DHCD.

- 10) The project must be organized and operated so as not to violate the state anti-discrimination statute (M.G.L. c151B) or the Federal Fair Housing statute (42 U.S.C. s.3601 et seq.). No restriction on occupancy may be imposed on the Low Income units (other than those created by state or local health and safety laws regulating the number of occupants in dwelling units and/or the provisions of the required DHCD Affordable Housing Restriction for the Low Income units). Notwithstanding the foregoing, occupancy of all units may be restricted to residents who meet the age and needs criteria appropriate to an assisted living residence.
- 11) The Applicant shall comply at all times with all provisions of its Affirmative Fair Housing Marketing Plan (the "AFHMP"), including, without limitation, the initial lottery and other tenant selection procedures, as required by DHCD Guidelines for G.L. c.40B Comprehensive Permit Projects applicable to the Project (the "40B Guidelines"). To the extent permitted by applicable law, the AFHMP shall include a local selection preference for 30 of the 43 Low Income units and 28 of the 40 Moderate units for the following: (a) current residents of Concord, (b) employees of Concord, (including Public School employees, Concord-Carlisle Regional High School employees, Housing Authority employees and other similar municipal employees), (c) employees of a business located in Concord, and (d) households with a child attending the Concord Public School or Regional High School. Of these local preference units, 70% shall be reserved for Concord preference except in the event that a qualified Concord preference applicant is not available. Upon completion of the initial tenant leasing, the Applicant shall submit a report to the Planning Division documenting the local preference categories. Notwithstanding the foregoing, occupancy of all units may be restricted to residents who meet the age and needs criteria appropriate to an assisted living residence.
- 12) The selection of the tenants for the Low Income and Moderate units shall be the responsibility of the Applicant in cooperation with the Monitoring Agent as designated by the Regulatory Agreement for the project. If the Town is named as Monitoring Agent or has any such responsibility as may be provided in the Regulatory Agreement, there shall be a provision for funds to be paid directly to the Town for said monitoring responsibility. The designation of potential tenants shall be done by lottery in accordance with the standards required by DHCD. It is understood and agreed by the Board that it is the Town of Concord's responsibility to provide and submit to DHCD data and information to justify the need for local preference, and if such information is not provided within 30 days of a request from DHCD or from the Applicant for such information, or if DHCD denies the local preference, then the requirement for local preference shall not be binding on the Applicant.
- 13) This Comprehensive Permit may be transferred or assigned only as provided in 760 CMR 56.05(12)(b), as amended, which requires that the Town of Concord be notified if the Comprehensive Permit is transferred. The Town of Concord acknowledges that it is the intent of Applicant to transfer the Comprehensive Permit to a limited partnership which will be formed as a single purpose entity to construct, own and

operate the Project, with the Applicant serving as the Developer and Management Agent for the Project.

- 14) **Prior to the commencement of any site work**, the Applicant shall revise the Plans and submit six (6) sets to the Town Planner for review that show the following:
- a. Modification of the freestanding sign shown on Sheet C3.60 to reflect the correct name of the Project;
 - b. The fire access road at the rear of the Building extending beyond the ends of the Building to provide aerial ladder access to the sides of the Building;
 - c. The fire hydrant at the rear of the Building accessible to fire apparatus from the fire access road;
 - d. Appropriate fire lane markings of fire access roads and the front entry circle;
 - e. The substitution of the proposed mowed turf area between the rear of the Building and the prison as a natural meadow;
 - f. Designation of parking spaces in the western parking lot for visitors and residents with vehicle and the eastern parking lot for employee parking only;
 - g. Site lighting within the parking areas and along the driveway shown on the grading and utility plans;
 - h. Appropriate signage regarding the public use of the pedestrian sidewalk/paths;
 - i. Addition of a manhole upstream of manhole PDMH-2;
 - j. The inclusion on the south side of the driveway at the BFRT crossing either include a culvert to allow flow under the roadway or size and design the new Winthrop Street drainage to collect and discharge the flow;
 - k. Spot grading details consistent with Concord Public Work's Design & Construction Standards and Details at the sidewalk and ramps to verify ADA compliance and at the intersection of the driveway and BFRT to clarify the drainage patterns at the intersection;
 - l. A surveyed plan stamped by a Professional Licensed Surveyor depicting the bearings and distances of the property boundary, existing emergency access easement on the Department of Corrections prison property, the proposed drainage easement area and the proposed conservation restriction area. The plan shall also include locations of boundary markers to be set. The plan set shall also verify the proposed emergency access and proposed drainage line up with the appropriate easements;
 - m. Replacement of the existing water main within the full extent of the limit of work shown and replacement of the existing hydrant as well as the 2-inch water service to #56 Winthrop Street;
 - n. Addition of a water main isolation valve at the property line;

- o. Relocation of the proposed 2-inch potable service connection to the 8-inch main serving the terminal hydrant proposed at the northwestern corner of the facility;
 - p. The extent of the irrigation system installed on the property and a notation as to whether it is connected to the Town's water supply;
 - q. The construction of a sidewalk from the west side of the Building to the walking trail behind the Building to the north;
 - r. The extent of mowed turf areas and irrigation;
 - s. Evaluation of the landscaping plan in relation to the grading necessary for the Low Impact Design for the stormwater drainage to ensure there is adequate area for the landscaping to survive;
 - t. Evaluation of the volume of fill generated by the site and Building grading, and whether this material can be used on site to create natural screening between the project and the prison, and;
 - u. Tree planting and path alignment in the northeast corner shall be in a natural form for an open meadow with trees in groups instead of in a line.
- 15) **Prior to the commencement of any site work**, the Applicant shall provide the Fire Department for review and approval a turning analysis for the front entry circle for the Town's E-One ladder truck. Alteration of the configuration of the entry circle may be required and approved by the Board.
- 16) **Prior to the commencement of any site work**, the Applicant shall conduct soil test pits in compliance with the Public Work's Design & Construction Standards & Details in the locations of the drainage basins to confirm infiltration basin elevations and High Ground Water separation. If the separation varies from the Applicant's design assumptions, there may be the need for a mounding analysis and changes to the design based on the test pit results that would require third party review and approval by the Board.
- 17) **Prior to the commencement of any site work**, the Applicant shall submit to the Town Engineer, Town Planner and Community Safety Officer for review and approval a Construction Sequencing and Safety Plan for the site. The plan shall include the location of construction material delivery and laydown areas, location of construction employee parking areas, and locations where construction vehicles will enter and exit the site. The plan should be developed for all phases required during construction.
- 18) **Prior to the commencement of any site work**, the Applicant shall submit to the Water/Sewer Superintendent as part of a Water Service Application an acceptable final water utility design plan incorporating all Water/Sewer Division's design standards.
- 19) **Prior to the commencement of any site work**, the Applicant shall submit to the Water/Sewer Division a water use impact report and conservation plan with

attention placed on the integration of demand management and conservation options (low flow fixture and efficient water using appliances). The report shall also include the proposed irrigation system design and proposed grass seed mix. The water use impact report will be used to determine the meter size and to calculate the required connection fees (assessed for peak potable water demand measured in gallons per minute (gpm) greater than 20 gpm at a rate of \$138.00 per gpm). If any irrigation system is connected to the Town's water supply, assessment of associated demands will be incorporated into the water service connection fee noted above.

- 20) **Prior to the commencement of any site work**, the Applicant shall submit to the Engineering Division, Natural Resources Division and the Town Planner for review and approval a hard copy and electronic (PDF) copy of the EPA's Notice of Intent General Permit and executed Stormwater Pollution Prevention Plan (SWPPP), the Erosion Control Plan (ECP), and Long Term Operations and Maintenance Plan (LTOMP). The SWPPP shall include a phasing plan, a signed illicit discharge statement, and requirement that all stormwater structures within the limit of work be thoroughly cleaned prior to the application of the top course of pavement. The electronic copy shall contain an individual file for the SWPPP, ECP and LTOMP.
- 21) **Prior to the commencement of any site work**, the Applicant shall have on site a qualified independent environmental monitor (EM) to ensure proper operations of all sediment and erosion control measures throughout the duration of the project. The EM shall also be responsible for overseeing invasive species removal and replanting efforts. The name and resume of the qualified independent environmental monitor shall be provided to the Engineering and Natural Resources Divisions for review and approval at least three weeks in advance of any site work. At a minimum, the EM shall be a "qualified person" with a minimum of 3 years professional environmental experience in construction monitoring and invasive species control efforts and shall meet the qualifications outlined in sec. 4.4.1 of the EPA Construction General Permit. The EM shall provide the Engineering and Natural Resources Divisions site evaluation/inspection reports at the frequency detailed in the SWPPP (i.e. weekly, after storms).
- 22) **Prior to the commencement of any site work**, the Applicant shall obtain a Right-Of-Way Permit from the Engineering Division for all proposed work within the Winthrop Street right of way for all modifications. The application for said permit shall include the individual curb ramp and driveway apron designs with sufficient spot grading to facilitate review. Ramps and aprons shall meet all applicable ADA and Town of Concord Design Standards.
- 23) **Prior to the clearing and grubbing of the site**, the Applicant shall:
 - a. Install the erosion and sedimentation controls and all safety measure identified in the Site Safety Plan pursuant to Condition #17.
 - b. Coordinate with the Town Planner a pre-construction meeting with Town staff to review proposed work and approved reporting protocol.

- c. Provide a construction and inspection schedule two weeks before the pre-construction meeting.
 - d. Provide to the Town Planner, and update as necessary, the name, address, and 24-hour contact information of an on-site construction manager, who shall have primary responsibility for the oversight of day-to-day construction activities at the Project site.
- 24) **Prior to the issuance of a Building Permit**, the Applicant shall submit to DHCD and the Planning Division for review and approval, a final affirmative fair marketing and lottery plan with related forms that are consistent with the *Comprehensive Permit Guidelines, Section III, Affirmative Fair Housing Marketing Plans*.
 - 25) **Prior to the issuance of a Building Permit**, the Applicant shall submit a proposed Regulatory Agreement regarding the rental and affordability of the development to the Board of Appeals in the form required by DHCD.
 - 26) **Prior to the issuance of a Building Permit**, the Applicant shall provide exterior light fixture cut-sheets to the Building Inspections Division to verify conformance with the Town's Zoning Bylaw Lighting Section.
 - 27) **Prior to the issuance of a Building Permit**, the Applicant shall provide to the Public Works Engineering Division a drainage easement plan and documents for review and acceptance by the Public Works Commission.
 - 28) **Prior to the issuance of a Building Permit**, the Applicant shall provide the Concord Municipal Light Plant (CMLP) with a detailed electrical load letter including proposed service size(s) in order to properly size the transformer(s).
 - 29) **Prior to the issuance of a Building Permit**, the Applicant shall provide CMLP a digital copy of the site plans in AutoCAD format.
 - 30) **Prior to the issuance of a Building Permit**, all proposed metering will require approval from the CMLP Meter Supervisor.
 - 31) **Prior to the issuance of a Building Permit**, the Applicant shall receive approval from the Massachusetts Department of Environmental Protection (MA DEP) pursuant to 310 CMR 15.000 Section 15.003(2) for the on-site sewage disposal system for systems serving a facility with a design flow of 10,000 gallons per day or greater. If the Applicant receives a Determination of Design Flow from MA DEP that the design flow is less than 10,000 gpd, the Applicant shall receive approval from the Board of Health for an on-site sewage disposal system designed in complete conformance with 310 CMR 15.00, the State Environmental Code, Title 5, and Concord Board of Health regulations.
 - 32) **Prior to the issuance of a Building Permit**, the Applicant shall submit to the Health Division for review and receive approval for a food service facility plan.
 - 33) **Prior to the issuance of a Building Permit**, the Applicant shall receive an Order of Conditions, or Superseding Order of Conditions, issued under the Wetlands

Protection Act and shall be subject to any conditions placed on the project by said orders. The Applicant shall provide a copy of a recorded Order of Conditions, or Superseding Order of Conditions to the Building Commissioner.

- 34) **Prior to issuance of a Building Permit**, the Applicant shall install permanent visible markers along the Conservation Restriction boundary. Location of the proposed boundary markers shall be provided to the Natural Resources Director for review and approval.
- 35) **Prior to the issuance of a Building Permit**, the Property Owner shall place a Conservation Restriction ("CR") on the portions of the Property shown on Sheet C1.01 Lease Area Plan dated April 28, 2017 pursuant to M.G.L. Chapter 184, §§ 31-33. To be considered complete, the CR must be accepted and approved by the Natural Resources Commission and the Select Board. The Property Owner shall also obtain approval from the Secretary of the Executive Office of Energy and Environmental Affairs, and record the CR at the Registry of Deeds, however this approval and recording is not required prior to issuance of the Building Permit. The CR shall be deeded to the Town of Concord acting by and through its Natural Resources Commission as its Conservation Commission, in perpetuity and exclusively for conservation purposes.
- 36) **Prior to the issuance of a Building Permit**, the Property Owner shall submit baseline documentation of the restricted land to be conducted in accordance with MassAudubon's *Massachusetts Conservation Restriction Stewardship Manual* (March 2006), or as approved by the Division of Natural Resources. Two copies of the completed report, and an electronic version, shall be provided to the Division of Natural Resources.
- 37) **Prior to the issuance of a Building Permit**, the Applicant shall provide a copy of the ground lease that includes public access to the pedestrian sidewalk/path along the driveway and from the BFRT across the natural meadow to the walking path within the Conservation Restriction area.
- 38) **Prior to the issuance of a Building Permit**, the Applicant shall submit to Water/Sewer Division an application for water service which shall include the following;
 - a. Identification of a Water/Sewer Division licensed "drain layer" who will be responsible for water and sewer service installation activities.
 - b. Two full size copies of the approved water and sewer utility plan.
 - c. An approved water use impact report and conservation plan which will determine sizing of the water meter and water system connection fee.
 - d. A plumbing plan which shall be provided including;
 - i. Meter bypass detail (with allowance for Water/Sewer Division issued security lock).

- ii. Design Data Sheets for all required cross-connection control devices. The devices shall not be installed without approval from the Water/Sewer Division.
- 39) **Prior to the commencement of any water utility work**, the Applicant shall receive written approval from the Water/Sewer Superintendent on the water service application required in Condition #38.
 - 40) **Prior to the installation of any Project Branding exterior signage**, the Applicant shall receive a Sign Permit from the Building Inspections Division.
 - 41) **Prior to the issuance of a Certificate of Occupancy**, as part of the Applicant's in-kind contribution identified in Condition #3, the Applicant shall remove from the Conservation Restriction land all surficial debris, such as dumped appliances, fixtures and tires, unless it is determined to be historically significant by the Planning Division.
 - 42) **Prior to the issuance of a Certificate of Occupancy**, the Health Division shall perform an inspection to verify that food service facilities have been constructed in accordance with approved plan.
 - 43) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall submit to the Water/Sewer Division a full size (Arch D) draft record drawing, created in accordance with Division standards, for review and approval. Following approval, the Applicant shall submit to the Division a full-size (Arch D) hard copy of the record drawing along with electronic copies in the form of CAD and PDF files.
 - 44) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall enter into a Water Service Connection Agreement with Concord Public Works for the purpose of clarifying the terms of service including ownership, operations, inspection, maintenance and future replacement provisions for related infrastructure. The agreement shall be signed by the owner, executed by the Director and recorded by the Applicant with the Middlesex South Registry of Deeds.
 - 45) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall submit to the Water/Sewer Division applicable Water Demand Minimization Affidavit(s) to demonstrate work was performed in accordance with the water use impact report and conservation plan.
 - 46) **Prior to the issuance of a Certificate of Occupancy**, if determined by CMLP, the Applicant shall submit to CMLP for review and approval a suitable utility easement for the proposed primary underground distribution system including Town fiber communication system where located outside of the Town Right-of-Way. The easement shall be reviewed and approved by CMLP prior to recording. All easements shall be recorded with the Middlesex South Registry of Deeds by the Applicant and the Applicant shall provide copies of the recorded documents to CMLP and the Town Planner.

- 47) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall submit to the Engineering and Natural Resources Divisions, CMLP and the Town Planner a hard copy and electronic (PDF) copy As-Built Plan of the site including grading, flood plain compensatory storage volume, elevations of all drainage infrastructure (i.e. inverts, rims, underground infiltration systems, etc.), driveway/parking grades, building elevations, all utilities and other pertinent information. The plan must be stamped by a Professional Engineer. A certification letter signed by a Professional Engineer shall outline any deviations from the design plans. If any deviations exist, they shall be clearly shown on the plan and described in a narrative format, and the engineer shall also certify that there will be no negative down-stream impacts with respect to stormwater mitigation as a result of the deviations from the design plans. Additional stormwater calculations performed by the design engineer may be needed to demonstrate the modifications have no negative impacts down-stream. This submittal shall be provided a minimum of three weeks prior to applying for occupancy to ensure adequate review time. Additionally, to assist in review, the as-built items shall be bold while all other plan items shall be screened down to clearly depict as-built conditions.
- 48) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall install to the satisfaction of the Fire Department a radio call box.
- 49) **Prior to the issuance of a Certificate of Occupancy**, the Town Planner shall verify that all plantings shown on the approved Landscape Plan have been installed. Any proposed minor modification or substitutions shall be reviewed and approved by the Town Planner prior to installation. If the Applicant provides documentation to the Town Planner that it would be detrimental to complete weather dependent aspects of the landscaping, the Town Planner may require a performance guarantee to ensure compliance. The Applicant shall submit to the Town Planner for review and approval a performance guarantee covering the cost of the landscaping and installation and a temporary certificate of occupancy shall be issued until all landscaping work is completed and a certificate of occupancy shall be issued subject only to completion of the landscaping work.
- 50) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall install to the satisfaction of the Town Planner all parking space striping, pavement markings, such as directional arrows, stop lines, crosswalks, and appropriate signage or pavement markings identifying the small car spaces as shown on the Plans. All striping, pavement markings and signage shall be maintained.
- 51) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall submit to the Planning Division copies of all construction and site work related documents provided to DHCD.
- 52) **Prior to the issuance of a Certificate of Occupancy**, the Applicant shall execute and record at the Middlesex South Registry of Deeds the required DHCD Regulatory Agreement.

- 53) **Upon completion of the project, and after the issuance of the final Certificate of Occupancy**, the Applicant shall submit to both DHCD and the Concord Select Board a project cost examination for the Comprehensive Permit project, to be approved by DHCD under applicable DHCD regulations and guidelines.
- 54) **One year following the issuance of the final Certificate of Occupancy**, the Applicant shall submit a report to the Town Planner noting viability of the required landscaping. Any landscaping found to be dead or dying shall be replaced. Any minor modification or substitutions shall be reviewed and approved by the Town Planner prior to installation.
- 55) **Three years following the issuance of the final Certificate of Occupancy**, the Applicant shall submit a report to the Town Planner noting viability of the established landscaping. Any landscaping found to be dead or dying shall be replaced. Any minor modification or substitutions shall be reviewed and approved by the Town Planner prior to installation.
- 56) **At all times**, the Applicant shall ensure that construction activity is in compliance with the Town's Construction Noise Bylaw.
- 57) Neither the Town of Concord nor any of its elected or appointed representatives, boards, agencies, employees, agents or independent contractors shall have any liability to any party for any error or omission in the design or construction of the Project.
- 58) By accepting this Comprehensive Permit, the Applicant agrees to the terms, covenants, conditions, and agreements contained herein. Each condition of this Comprehensive Permit shall run with the land, and, in accordance with its terms, be applicable to and binding on the Applicant, the Applicant's successors and assigns for as long as the Project does not strictly and fully conform to the Town of Concord's Zoning Bylaw.
- 59) This Comprehensive Permit shall expire three years from the date hereof unless construction on the Project has commenced by that time. The Applicant may apply to the Board for reasonable extensions to this Permit for good cause.
- 60) All invoices generated by the Board's peer reviewers during the application stage shall be paid within thirty days of the filing of this decision with the Town Clerk, whether this decision is appealed or not. No post-permit reviews of documents or plans shall be conducted, nor building permit or certificate of occupancy issued, until all prior invoices have been paid in full.
- 61) In the event that construction is commenced and thereafter interrupted or delayed for a period of six months or longer, the Applicant shall satisfy the Building Inspections Division that it has restored the site sufficiently to prevent any nuisance conditions that would adversely affect abutters or the public interest, including the appropriately controlled stockpiling and/or storage of soil, other materials and equipment to protect the public health, safety and environment.

62) The Board or its agents may enter onto and view and inspect the Property during regular business hours to ensure compliance with the terms of this Permit.

