

**TOWN OF CONCORD
SELECT BOARD MEETING
June 6, 2022 | 6:30 PM
TOWN HOUSE
22 MONUMENT SQUARE**

SECOND FLOOR MEETING ROOM AND VIA ZOOM
<https://us02web.zoom.us/j/84092395810?pwd=TnMyWmprWHBlaz091CczdQM0EvWVVFZz09>

Meeting ID: 840 9239 5810

Passcode: 865209

**AGENDA
(Revised June 3, 2022)**

| # | Time* | Agenda Item |
|-----|--------|--|
| 1. | 6:30pm | Call to Order |
| 2. | | Consent Agenda <ul style="list-style-type: none"> • Town Accountant Warrant: May 26, 2022 • Minutes: May 23, 2022 • Gift Acceptance: <ul style="list-style-type: none"> ○ \$1,500 from Workers Credit Union to the Concord Fire Department • Tour Guide License Renewal: John Kinsman |
| 3. | 6:35pm | Interim Town Manager's Report |
| 4. | 6:40pm | Chair's Report |
| 5. | 6:45pm | Seasonal Outdoor Restaurant Seating Application by 80 Thoreau, LLC, of 80 Thoreau Street |
| 6. | 6:55pm | Approval of 2022 General Obligation Bond Issue |
| 7. | 7:05pm | Discuss 2023 Annual Town Election & Annual Town Meeting Schedule with Town Moderator Carmin Reiss |
| 8. | 7:20pm | Departmental Update from Concord Public Works Director Alan Cathcart |
| 9. | 8:10pm | Amendment to RHSO Intermunicipal Agreement |
| 10. | 8:25pm | Discuss Battle Road Trail Connector to Thoreau Farm |
| 11. | 8:40pm | Committee Nominations: Holly Cratsley, of 10 Edmonds Road, to the Concord 2025 Executive Committee; Patricia Hopkins, of 65 Dalton Street, to the Concord 2025 Executive Committee |
| 12. | 8:45pm | Committee Appointments: Michael Lawson, of 1695 Lowell Road, to the Economic Vitality Committee for a term to expire May 31, 2025; Burton Flint, of 1643 Main Street, to the Community Preservation Committee for a term to expire May 31, 2024; Diane C. Proctor, of 57 Sudbury Road, to the Concord 2025 Executive Committee for a term to expire December 31, 2026; Cynthia Rainey of 80 Hunters Ridge Road, as the Concord Public School Committee representative to the PEG Access Advisory Committee with a term to expire May 31, 2025; Courtland Booth of 144 Wright Road as the Concord Public School Committee representative to the Financial Audit Advisory Committee for a term to expire May 31, 2023. |
| 13. | 8:50pm | Correspondence |
| 14. | 8:55pm | Public Comment |
| 15. | 9:00pm | Executive Session in accordance with M.G.L. 30A, Section 21(a)(2), to conduct strategy sessions |

| | | |
|--|--|--|
| | | in preparation for negotiations with nonunion personnel (Town Manager), not to return to regular session |
|--|--|--|

**Times are approximate and subject to change*

| |
|---|
| Current Board and Committee Vacancies |
| Board of Health |
| Comprehensive Sustainability and Energy Committee |
| Concord 2025 Executive Committee |
| Concord Housing Development Corporation (CHDC) |
| Concord Local Cultural Council |
| Conservation Restriction Stewardship Committee |
| Council on Aging |
| Cultural Council |
| Economic Vitality Committee |
| Historic Districts Commission |
| Library Board |
| Natural Resources Commission |
| Personnel Board |
| Planning Board |
| Public Ceremonies and Celebrations Committee |
| Tax Fairness Committee |
| Transportation Advisory Committee |
| Trustees of Donations |
| West Concord Advisory Committee |
| West Concord Junction Cultural District |
| White Pond Advisory Committee (WPAC) |
| Zoning Board of Appeals |

**Town of Concord
Select Board
Minutes
May 23, 2022**

Pursuant to a notice duly filed with the Town Clerk, the Concord Select Board convened in a meeting in the Second Floor Meeting Room and via Zoom on May 23, 2022 at 6:30pm.

Present were Matthew Johnson; Chair, Henry Dane, Linda Escobedo, and Mary Hartman. Also present was Kerry Lafleur, Interim Town Manager. Terri Ackerman, Clerk, was absent.

Call to Order

Chair Johnson called the meeting to order at 6:30 p.m.

Name Pro Tem Clerk

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to name Mary Hartman pro tem Clerk of the Concord Select Board.

Consent Agenda

- Minutes: May 16, 2022
- One Day Special Liquor License Applications:
 - The Umbrella Arts Center, 40 Stow Street on June 10, 2022 from 6:30pm to 10:30pm, All Alcoholic Beverages
 - Verrill Farm/Chelmsford School, 11 Wheeler Road, on May 27, 2022 from 5:00pm to 9:00pm, Wine & Malt Beverages Only
 - Verrill Farm/Chelmsford School, 11 Wheeler Road, on June 4, 2022 from 6:00pm to 9:00pm, Wine & Malt Beverages Only
- Tour Guide License Renewal
 - Debra Canally
- Weekday Entertainment License Renewal
 - Saltbox Kitchen, LLC

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to approve the consent agenda with amendments made to the meeting minutes of May 16, 2022 including:

1. On page 9, Ms. Escobedo requested the minutes be amended to include the word “survey” following “Ms. Escobedo encouraged residents to fill out the Housing Production Plan...”
2. On page 9, Ms. Escobedo requested the minutes be amended to reflect the roll call vote taken to enter Executive Session.

Interim Town Manager’s Report

Ms. Lafleur reviewed the Interim Town Manager’s report as included as part of the Select Board’s meeting packet. Ms. Lafleur noted that she would be begin including COVID-19 reporting as part of her Town Manager’s report amidst a recent surge in cases statewide. Ms. Lafleur added that Donna MacIntosh would be joining the Town Manager’s Office as her Executive Assistant, and she and the Board reviewed the roles of the staff members in the Town Manager’s Office. Ms. Lafleur also reviewed the departmental updates included as part of her report.

Chair’s Report

**Town of Concord
Select Board
Minutes
May 23, 2022**

Chair Johnson reported that negotiations with Ms. Lafleur to become the permanent Town Manager were going well and asked the Board to plan for an Executive Session on June 6, 2022 to discuss a potential contract. Chair Johnson also noted the large number of Boards and Committee's seeking members and encouraged residents to volunteer to serve. Finally, Chair Johnson stated that the Board would need to continue the public hearings scheduled for that evening, as National Grid would not be able to attend the meeting. Chair Johnson added that because of the need to continue the Public Hearings, some agenda items would be taken out of order.

Update from the Civil War Monument Task Force

Civil War Monument Task Force members Beth van Duzer, of 4 Granite Post Road, Matt McGrath, of 134 Belknap Street, and David Wood of 226 Lexington Road, reviewed the charge of the Task Force, as well as several historical documents they found as part of their research. The Task Force explained why they were recommending the inclusion of George Dugan, an African American Civil War soldier, and a resident of Concord for many years, on the monument. The Task Force described Mr. Dugan's service, and why he may not have been included on the Monument previously, but why he deserved to be memorialized.

The Board and the Task Force discussed the formatting of a proposed new plaque, and why they were suggesting the Town invest in a new plaque as opposed to altering the existing one. The Task Force also informed the Board that they had received an estimate for the cost of a new plaque for \$25,000. Additionally, the Task Force informed the Board that they had received estimates to have the Monument cleaned, for \$100,000. The Board, Interim Town Manager, and the Task Force discussed several sources of funding for the project, and Chair Johnson suggested that the Task Force reach out to the Community Preservation Committee for potential funding. The Board thanked the Task Force for their diligence and service to the Town.

Diane Proctor, of 57 Sudbury Road and Chair of the Community Preservation Committee (CPC), encouraged the Task Force to apply to the CPC. Ms. Proctor advised the Task Force to attend the CPC meeting on June 21, 2022, where they could learn more about applying for grant funding.

**Public Hearing: Grant of Location Petition by National Grid to relay
approximately 470 feet of 2- inch Coated Steel (1930) gas main with
470 feet of 2-inch Plastic in Davis Court from Bedford Street to end at
#47 Davis Court**

Chair Johnson stated that the Board would need to open each public hearing and continue them to June 13, 2022 at the request of National Grid

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to open the public hearing for a Grant of Location Petition by National Grid to relay approximately 470 feet of 2- inch Coated Steel (1930) gas main with 470 feet of 2- inch Plastic in Davis Court from Bedford Street to end at #47 Davis Court

Upon a motion duly made and seconded, it was UNANIMOUSLY

**Town of Concord
Select Board
Minutes
May 23, 2022**

VOTED: to continue the public hearing to June 13, 2022 at 6:40pm.

Public Hearing: Grant of Location Petition by National Grid to relay approximately 250 feet of 4- inch Plastic main in Lowell Road with approximately 250-feet of 8-inch Plastic main from the existing 8-inch plastic main to house #925 Lowell Road.

Upon a motion duly made and seconded, it was UNANIMOUSLY

VOTED: to open the public hearing for a Grant of Location Petition by National Grid to relay approximately 250 feet of 4- inch Plastic main in Lowell Road with approximately 250-feet of 8-inch Plastic main from the existing 8-inch plastic main to house #925 Lowell Road.

Upon a motion duly made and seconded, it was UNANIMOUSLY

VOTED: to continue the public hearing to June 13, 2022 at 6:50pm.

Public Hearing: Grant of Location Petition by National Grid to extend its existing 2-inch plastic main in Simon Willard Road approximately 480 feet to serve an existing residence located at #398 Simon Willard Road.

Upon a motion duly made and seconded, it was UNANIMOUSLY

VOTED: to open the public hearing for a Grant of Location Petition by National Grid to extend its existing 2-inch plastic main in Simon Willard Road approximately 480 feet to serve an existing residence located at #398 Simon Willard Road.

Upon a motion duly made and seconded, it was UNANIMOUSLY

VOTED: to continue the public hearing to June 13, 2022 at 7:00pm.

Public Hearing: Grant of Location Petition by National Grid to relay approximately 805 feet of 2- inch, coated steel (1930) and approximately 150 feet of 2-inch, plastic (2013) with approximately 955 feet of 2-inch, plastic in Crescent Rd from #42 Crescent Rd to the end of main at #138 Crescent Rd; and to relay approximately 735 feet of 2-inch, coated steel (1930) with approximately 735 feet of 2-inch, plastic in Hosmer Rd from Nashoba Rd to Crescent Rd; and to relay approximately 710 feet of 2-inch, coated steel (1930) with approximately 710 feet of 2-inch, plastic in Garland Rd from Crescent Rd to Nashoba Rd; and to relay approximately 465 feet of 2-inch, coated steel (1957) with approximately 465 feet of 2-inch, plastic in Wilson Rd from Nashoba Rd to end of main at #59 Wilson Rd; and to relay of approximately 860 feet of 2- inch, coated steel (1957) with approximately 860 feet of 2- inch, plastic in Nashoba Rd from Hosmer Rd to end of main at #321 Nashoba Rd; and to relay of approximately 480 feet of 2- inch, coated steel (1930) with approximately 480 feet of 2- inch, plastic in Nashoba Rd from Garland Rd to the existing 2- inch,

**Town of Concord
Select Board
Minutes
May 23, 2022
coated steel at #144 Nashoba Rd**

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to open the public hearing for a Grant of Location Petition by National Grid to relay approximately 805 feet of 2- inch, coated steel (1930) and approximately 150 feet of 2-inch, plastic (2013) with approximately 955 feet of 2-inch, plastic in Crescent Rd from #42 Crescent Rd to the end of main at #138 Crescent Rd; and to relay approximately 735 feet of 2-inch, coated steel (1930) with approximately 735 feet of 2-inch, plastic in Hosmer Rd from Nashoba Rd to Crescent Rd; and to relay approximately 710 feet of 2-inch, coated steel (1930) with approximately 710 feet of 2-inch, plastic in Garland Rd from Crescent Rd to Nashoba Rd; and to relay approximately 465 feet of 2-inch, coated steel (1957) with approximately 465 feet of 2-inch, plastic in Wilson Rd from Nashoba Rd to end of main at #59 Wilson Rd; and to relay of approximately 860 feet of 2- inch, coated steel (1957) with approximately 860 feet of 2- inch, plastic in Nashoba Rd from Hosmer Rd to end of main at #321 Nashoba Rd; and to relay of approximately 480 feet of 2- inch, coated steel (1930) with approximately 480 feet of 2- inch, plastic in Nashoba Rd from Garland Rd to the existing 2- inch, coated steel at #144 Nashoba Rd

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to continue the public hearing to June 13, 2022 at 7:10pm.

**Public Hearing: Liquor License Application for a Change of DBA by
Trails End Café, LLC, Located at 97 Lowell Road**

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to open the public hearing for a liquor license application for a change of DBA by Trails End Café, LLC, located at 97 Lowell Road

Ms. Lafleur read a memo sent by James White, a member of Trails End Café, LLC, requesting to change the DBA of Trails End Café, LLC and explaining that if the Board had any questions, he'd be happy to answer them.

The Board noted that the change was mostly administrative and added that the business was already operating as the proposed DBA.

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to close the public hearing for a liquor license application for a change of DBA by Trails End Café, LLC, Located at 97 Lowell Road

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to approve the request for a change of DBA by Trails End Café, LLC, located at 97 Lowell Road

Committee Nominations

Michael Lawson, of 1695 Lowell Road, to the Economic Vitality Committee; Burton Flint, of 1643 Main Street, to the Community Preservation Committee; Diane C. Proctor, of 57 Sudbury Road, to

**Town of Concord
Select Board
Minutes
May 23, 2022**

the Concord 2025 Executive Committee

Committee Appointments

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to appoint Kristen Hagerty to the Diversity, Equity, and Inclusion Commission for a term to expire April 30, 2025; and to reappoint Steve Ledoux to the Minuteman Regional School Committee for a term to expire April 30, 2025

Public Hearing: Liquor License Application for Multiple Amendments Including Change of Manager and Change of Officers/Directors/LLC Managers by Musketaquid Sportsmen's Club, Inc. of 250 Old Mill Road

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to open the public hearing for a liquor license application for multiple amendments including change of manager and change of officers/directors/LLC managers by Musketaquid Sportsmen's Club, Inc. of 250 Old Mill Road

Gavin Morrissey, a representative for the Musketaquid Sportsmen's Club, Inc. explained that the previous manager of record was not able to commit as much time to their organization as they had been, and they were requesting to change their manager of record.

The Board and Mr. Morrissey discussed the organization's proposed new manager, their TIPS certifications, and when the proposed manager would be there. Mr. Morrissey explained the role of the proposed manager, and that there would not be a change in activities held or the number of those activities. Mr. Morrissey also explained the need to reduce the number of Board members, especially throughout COVID-19 pandemic. Mr. Morrissey noted that they were proposing to go from 17 officers to 14 officers. The Board noted that the Chief of Police had reviewed the application and had no objections to the proposals.

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

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to approve the request for Change of Manager for Musketaquid Sportsmen's Club, Inc. of 250 Old Mill Road; and to approve the request for a change of Officers/Directors/LLC Managers by Musketaquid Sportsmen's Club, Inc. of 250 Old Mill Road.

Application for License to Conduct a Taxi or Livery Service in Concord: Concord Limo Services

Benaissa Boutrig, the owner of Concord Limo Services, reviewed his application with the Board. Mr. Boutrig explained that his business was primarily based around transportation to and from the airport. He emphasized that the vehicles operated by his business would be kept at the driver's home, and so none would be garaged at his home. He further added that the Police Department and the Building Commissioner approved of the application and that he had filed a Home Occupation

**Town of Concord
Select Board
Minutes
May 23, 2022**

Application with the Building Department.

Tanya Gailus, of 62 Prescott Road, asked if there would be an increase in traffic if the application was approved, as they were proposing to only manage the business from their home.

Karen Byrne, the Senior Administrative Assistant for the Concord Board of Health, added that the applicant would need to file a Home Occupation Application if they intended to do paperwork from their home. Mr. Boutrig noted that the Home Occupation Permit was included in the Board's packet.

Upon a motion duly made and seconded, it was UNANIMOUSLY
VOTED: to approve the application for a livery license for Concord Limo Services, of 113 Peter Spring Road.

Update from Board of Health Regarding Mosquito Spraying

Dr. Debra Green, of 341 Mattison Drive and member of the Board of Health, and Melanie Dineen, the Town's Public Health Director, gave a brief presentation to the Board regarding the mosquito reduction policies of the Town. They explained that in 2022 the EEA was only allowing municipalities to opt out of aerial spraying if they went through a rigorous process of submitting an alternate management plan. Owing to Concord's historically high risk of EEE and West Nile Virus, the Board of Health unanimously agreed that the Town should not opt out of the State's aerial spraying program. It was added that many surrounding communities had also not opted out of the program. The Board and Dr. Green discussed notification procedures should aerial spraying be required, including notification on the Town's website. Dr. Green also explained that pollinators would not likely be affected by the aerial spraying, as it would be conducted at night when they are not active. Dr. Green added that the chemicals used break down in sunlight and are not considered "forever-chemicals." Dr. Green encouraged residents to visit the Centers for Disease Control and the Massachusetts Department of Public Health's website for more information regarding the spraying and mosquito borne illnesses.

Tanya Gailus, of 62 Prescott Road, recommended that the Town check with experts in ecology regarding potential aerial spraying.

Finalize and Vote on 2022-2023 Select Board goals

Chair Johnson and the Board reviewed the Select Board goals document included as part of the Select Board meeting packet. Chair Johnson also reviewed a spreadsheet he had prepared which compiled the Boards top ten goals for the coming year. The Board discussed several changes to the goals document, and Chair Johnson amended the document throughout their discussion to reflect them.

Tanya Gailus, of 62 Prescott Road, referenced a letter sent to the Select Board which suggested that natural preservation be added under the sustainability portion of the Select Board's goals.

Pamela Dritt, of 13 Concord Greene Unit 4, stated that the Board oversaw the will of the Town as it relates to other Boards and Committees, and asked if their goals would consider financial support to other Boards and committees as they pursued sustainable initiatives.

**Town of Concord
Select Board
Minutes
May 23, 2022**

Mark Gailus, of 62 Prescott Road, stated that the Town's natural environment was an important part of the Town's infrastructure.

Upon a motion duly made and seconded, it was UNANIMOUSLY **VOTED:** to approve the 2022-2023 Select Board Goals as included in the Select Board Meeting Packet for May 23, 2022 and amended that evening.

Select Board Liaison Reports

Mr. Dane reported that the Concord 2025 Committee held its second meeting. He noted that an additional member has been nominated to the Committee. He added that the Committee met with the Director of the Minuteman National Park, and that he had reached out to the Town of Lexington's Select Board. Mr. Dane also explained the scheduling conflicts the Town may face in 2025, as the anniversary date falls between Good Friday and Easter. Mr. Dane added that the Committee was also interested in forming subcommittees.

Ms. Escobedo reported that she attended a CPC meeting where conditions for various grant awards were discussed. She noted that the Committee would be looking for a new member. She also reported that the CPC would be holding an informational meeting in June where new applicants could hear about the process of applying to the CPC for a grant. Ms. Escobedo also reported that she attended the Housing Production Plan Steering Committee, and noted that their first public forum would be held on June 7, 2022 at 7:00 p.m. Ms. Escobedo also encouraged residents to complete the Housing Production Plan survey.

Ms. Hartman encouraged residents to visit the library following the recent renovations. Ms. Hartman also reported that she had reached out to the Chairs of the White Pond Advisory Committee to offer her support.

Chair Johnson reported that the Climate Action Advisory Board was seeking a new member. Chair Johnson also noted that the Comprehensive Sustainability and Energy Committee was not able to meet due to a lack of quorum. Chair Johnson also reported on his first Chair's Breakfast and noted that he would be moving the meeting to 8:00 a.m. next month.

Ms. Hartman asked the Chair about the comments from Carmin Reiss, Town Moderator, regarding the need to issue a letter related to Article 47 from the Annual Town Meeting

Miscellaneous Correspondence

Chair Johnson reviewed the miscellaneous correspondence included as part of the Select Board Meeting packet.

Public Comment

Tanya Gailus, of 62 Prescott Road, thanked Chair Johnson for his comments on May 16th during his Chairs Remarks.

Adjourn

**Town of Concord
Select Board
Minutes
May 23, 2022**

Meeting Materials: <https://concordma.gov/DocumentCenter/View/36662/May-16-2022>

Minuteman Media Network Coverage:

<https://www.youtube.com/watch?v=NnuyLQFTWW8&list=PL1TTzrWEKOOkHKXNLQprEz0f0ofHYKj8-&index=1>

Town of Concord

SELECT BOARD'S OFFICE

Memorandum

DATE: June 1, 2022
TO: Concord Select Board
FROM: Michael Gibbons, Senior Administrative Assistant
SUBJECT: Requested License Renewal

Below is listed an applicant for a Tourist Guide License. I have confirmed that the applicant has attended the Concord Guide Course taught by Victor Curran, as required. The applicant has filed a complete application and paid the requisite fees. I recommend the Select Board approve the application and grant the license.

Tour Guide License

John Kinsman



TOWN OF CONCORD

Office of the Interim Town Manager

Operational Status Reports & Departmental Updates

For the Period Ending May 27, 2022

Town Manager and General Government

Town Manager's Office

- Staff from the Town Clerk's Office and the Town Manager's Office have been working diligently on updating the data in the volunteer committee database. The database itself has been updated and town staff is working on a data integrity audit which is time consuming. Town staff expect to have an accurate database by the end of this summer.

Sustainability

- The Sustainability Division worked on a draft matrix on knowns and unknowns for a solar feasibility study scope of work discussion. Staff also attended webinars on federal grants and found some resources to share with colleagues in other departments.
- Met with the Senior Management Team on the Fleet Study and have been working on doing follow up, especially on Electric Vehicle (EV) charging infrastructure implementation
- The Sustainability Division also assisted volunteers, CMLP, and the Concord Sustainable Energy Committee to prepare for an upcoming event on June 4 looking at EVs and charging

Emergency Services

Police

Log Items 707

Traffic Enforcement 48

Motor Vehicle Stops 106

Arrest 2

- The Department has been monitoring the tragedy which occurred in Uvalde, Texas. The department recognizes that recent events may cause concern for families and others in the community. Emerson Hospital provided the following link <https://www.childtrends.org/blog/resources-help-children-wake-school-shooting> to help children after a school shooting. The department wants the community to know that if they see something or someone displaying suspicious behavior to call 911 or 978-318-3400 immediately. Officers will be dispatched and investigate.
- Captain Thomas Mulcahy and Lieutenant Brian Goldman attended training sponsored by the Massachusetts Emergency Management Agency (MEMA) which provided participants with tools and methodologies for conducting venue-specific and event-specific risk assessments designed to complement and expand on the national critical infrastructure framework guidelines. The training was provided by the National Center for Spectator Sports Safety and Security at the University of Southern Mississippi and Texas A&M Engineering Extension Service.

Fire and Rescue

Training

- Two Concord Firefighters graduated this past week from the Massachusetts Firefighting Academy Recruit Program at the Bridgewater Campus. Firefighters Samantha McChesney and Conor Finerty graduated with class BW19 on Friday, May 19, 2022. Both excelled at the eleven program and we are pleased to have them back on shift!



Massachusetts Firefighting Academy

Career Recruit Class #BW19 Graduation • May 20, 2022

Calls for service

- The Fire department responded to 94 calls over the previous week, including a response on Sunday to a leaking 220lb propane tank on Arrowhead Road. Fire Companies were on scene with hose lines deployed until the tank was made safe. Also on Sunday, Concord responded to assist the Acton Fire Department with a brush fire on Independence Road in Acton.

Fire Prevention

- Fire Prevention conducted a variety of inspections and plan reviews this week. Of interest was a violation noted by Lt. Nichols conducting a propane tank installation inspection. The tank was installed within the prohibited range from a window in the structure and the inspection failed pending reinstallation.

Planning Division

- **Housing Production Plan – virtual Public Forum scheduled for June 7!** The purpose of the Housing Production Plan (HPP) is to help Concord find the best ways to meet its housing needs and shape the location, type, and design of development. The HPP will consider best practices to help promote diverse housing options that are sensitive to the community context and capacity. Join the Town’s project team for a virtual **Community Forum on Tuesday, 06/07 at 7:00pm**. This online event is free and open to the public. To register type this link into a browser: concordma.gov/hpppublicforum.
- **Planning Board meeting of May 24:** the Planning Board discussed the Sunnyside Lane Definitive Subdivision Plan and appreciate the efforts by the Applicant and the Public Works Engineering Division for proposed improvements to the intersection of Sunnyside Lane and Laws Brook Road that would improve the sight distance for drivers exiting Sunnyside Lane and allow for two very large oaks trees on Laws Brook Road to remain.
- The Board accepted the withdrawal without prejudice the Site Plan Review application for the proposed Bubble Tea Restaurant at 191 Sudbury Road.
- The Town Planner presented the first draft of the Scenic Roads Bylaw Rules & Regulations. The Board briefly discussed the draft Regulations just make sure they had an understanding of the process and to see if they had any issues, concerns, or questions they would like Town staff and/or the Historical Commission or Public Works Commission to discuss/comment/recommend as the HC and PWC begin their review and as the Town Planner gets input from other stakeholders before coming back to the Board later this summer.



Building Inspections Division

- From May 12 – May 26 the Building Inspections staff issued 32 Residential building permits, 2 Commercial building permits, 30 Electrical permits, 20 Plumbing permits, 7 Gas permits, 5 Sheet metal permits, and 2 Sign permits.
- From May 12 – May 26 the Building Inspections staff conducted 73 Building inspections, 70 Electrical inspections, 60 Plumbing & Gas inspections, 6 Annual Inspections of Commercial buildings, and reviewed 3 ZBA applications for the July 14 ZBA meeting.
- Building Inspections staff is available on a daily basis by phone (978.318.3280) or by email (buildinginspections@concordma.gov) to answer various zoning, permitting, and building code questions from Concord residents, Contractors, Architects, Land Surveyors, and Realtors.

Health Division

- **White Pond Watershed page on Town website:** Health Division staff have been working with other Town staff to create a new webpage that will link various town interests relating to White Pond (Beach & Park, Cyanobacteria, Natural Resources, and White Pond Advisory Committee) so folks can find information in one convenient place. We are working to improve the links to this page: <https://concordma.gov/3039/White-Pond-Watershed>.

- **White Pond Beach:** Met with Facilities and Recreation staff regarding opening White Pond Beach by June 20, the opening of which has been delayed due to construction activities.
- **Board of Health/DPH projections for 2022 Mosquito season:** Health Division staff and Board of Health (BOH) member Dr. Deborah Greene attended the May 23 Select Board meeting to discuss the recent BOH vote 4-0 in favor of NOT opting out of the State Reclamation and Mosquito Control Board (SRMCB) Mosquito Spraying Program. This vote was taken after a discussion of previous mosquito control efforts, review of historical surveillance and response data, the MDPH 2022 projected Risk level of Middlesex County which is projected to be “High Risk” for Eastern Equine Encephalitis (EEE), and the health impacts of EEE.

Natural Resources Division

- **Seasonal/Summer Crew now on-board:** Rangers DeAnna Collins and Vanessa Vallee started this week and will be patrolling conservation lands and Estabrook Trail to advise trail users of rules and regulations, and to educate the public on our local ecology and history. Shelby Guinard also joined the Natural Resources staff this week as the first Conservation Crew member and will be joined in the next few weeks by a second Crew member. They assist the Division in maintaining over 34 miles of trails and 1,500 acres of conservation land.

Economic Vitality & Tourism Division

- **Partnering with the Umbrella:** This past Sunday was the first of 3 Sunday afternoon African American History Walking Tours, conducted in partnership with the Umbrella Arts Center’s “The Colored Museum” production. There were 7 attendees this past weekend with additional folks signed up for the following 2 weekends.
- **Discover West Concord Days:** On Saturday, May 21st the EV&T division participated in Discover West Concord Days, running 2 free West Concord Walking Tours which were very well received with 20 participants.
- **Additional Tour Guides needed!** EV&T Manager Beth Williams will be interviewing additional candidates as tour guides due to increased demand for private tours!

Library

- The Library thanks the Interim Town Manager and Selectboard for joining the Open House celebrations at the Main and Fowler libraries on Saturday. The events were well attended, and ice cream was enjoyed by many. The mural at Fowler library has been unveiled and we dedicated the expansion at the Main Library.
- The Library Corporation, Friends, and staff are planning a second Open House for June 18 from 11am to 3pm. The program will include a visit by sculptor Nancy Schön to dedicate the rubber ducky sculpture in the Children’s Garden, as well as the unveiling of the Wayside Dollhouse with the Guiod family.
- This year’s Summer Reading theme is “Read beyond the beaten path!”. The program explores new lands and creatures all over the world with books, outdoorsy programs, music and more. Children receive a necklace and brag tag when they register. They earn beads for the necklace by reading and completing weekly challenges. The popular scavenger hunt around Concord for Henry and

Weezie, our library owl mascots, is returning as well. To sign up and read more (and see the staff's PSA video!) go to <https://concordlibrary.org/kids/summer-reading-2022>. Registration begins June 6. This program is generously supported by the Friends of the Concord Free Public Library.

- The deadline for applications for the Charles Williams Scholarship is June 3. The Charles Williams Fund provides an annual stipend for scholarships awarded to college-bound Concord students who demonstrate an interest and aptitude in the Studio Arts or in Music. This fund is administered by the Concord Free Public Library Corporation. For more information: <https://concordlibrary.org/about/williams-scholarship>
- Concord Carlisle High School students are invited to attend the library's Finals Study Day on Sunday, June 12 from 1pm-8pm. Hit the books in Concord's #1 place to study, the Concord Free Public Library.

Human Services

Minuteman Media Network

- The Productions team have a full plate with projects ranging from farm/agriculture, art and culture to the "Music Makes Me Happy Chorus" <https://www.mmmh-singers.org>, to town school chorus at the middle school to the high school.
- MMN Videographers have been very helpful recording and assisting to run many meetings and events including the Concord Select Board, the School Committee, the Concord Museum live streaming, Concord Finance Committee, middle school music events, and high school chorus.
- We are prepping for the CCHS graduation June 4, with a fiber video test later this week. We will be using 3 wireless video cameras to make setup and break-down fast and allow for a safer event on the football field. (no wires!)

Recreation:

1. Staffing

- a. Received no applications for our full time Aquatics Program Manager position which is concerning.
- b. Received a limited number of applications for part time summer employment.

2. Budgets

- a. Beede revenue for FY22 is projected to reach \$2M which would surpass the revised FY22 revenue estimate of \$1.5M. We are working to analyze and anticipate expenses for the remainder of the year in the coming year but expect to be at budget. We will proceed with purchasing equipment to allow for the required system replacements if the FY22 budget allows. We are working closely with the facilities Department to review the depreciation schedule and will be bringing in vendors to provide estimates on equipment and facility areas that need attention as soon as possible.
- b. The CPC award for \$75K to fund a consultant to update to the Recreation Facilities Strategic Plan was approved at Town Meeting. The Recreation Commission will be formulating an RFP in the coming weeks so we can begin the strategic planning as soon as the new fiscal year begins.

3. **White Pond**

- a. We have sold 482 memberships so far out of an available 600. 380 of those memberships are sold to Concord residents.
- b. Planning to open June 20 as of now. Facilities and Health Department have been great working collaboratively to prepare for the beach inspection the week of June 13.

4. **Summer Camp**

- a. Camp regulations for summer 2022 were made available by MDPH. Regulations are very reasonable as they relate to COVID19 and our staff will prepare to share all requirements with our health care supervisor, health care consultant, parents and staff as we lead up to the start of camp (June 21, 2022). A link to those requirements can be [found here](#).

5. **Special Events**

- a. Preparing for the Stow Street Block Part on June 4. Multiple Town Departments will be participating in the Touch-a-Truck event including Police, Fire and Public Works.

6. **Beede Memberships**

A reminder to all Town employees that we have discounted memberships available for purchase at the Beede Swim and Fitness Center, info below. Thank you for sharing with your employees.

The Beede Swim & Fitness Center, located on the campus of the Concord-Carlisle Regional High School, hosts an 8-lane lap pool, a therapy pool, a children’s pool, a diving well, and pool-side spectator seating. There are two 1,600-square-foot fitness rooms; one for weight training and one for cardiovascular exercise. In addition, the facility includes men’s and women’s locker/shower rooms, and family changing rooms. The facility is open approximately 100 hours each week throughout the year Monday-Friday 5:30A-9:00P and weekends 7:00A-6:00P. Never seen the Beede Center? Check out our welcome video by [clicking here](#).



We are forever grateful for the ultimate sacrifice of those who died for the United States of America. May their courage and dedication never be forgotten.



TOWN OF CONCORD

Office of the Interim Town Manager

Operational Status Reports & Departmental Updates

For the Week Ending June 3, 2022

Town Manager and General Government

Shared Streets and Spaces Grant (Main St./Walden St. Intersection) –Administered by MassDOT, this grant provides funding to municipalities for projects that support public health, safe mobility, and strengthened commerce. A cross-departmental team including Engineering, Public Information, and Police worked cooperatively to draft the grant application. Concord’s Public Information and Communications Manager wrote and managed the process, Engineering provided conceptual designs, cost estimates, and gathering traffic count information for multiple projects and locations. Police assisted with traffic and speed study information and assisted with identifying areas of concern. On May 20, the Town was notified that its grant application for \$197,663.75 was awarded for speed control and pedestrian improvements at the intersection of Main and Walden Street. The deadline to complete the work is December 31, 2022.

Facilities

- Facilities worked this week to replace electronic locks at Police Department cells and completed repairs and painting at Cemetery building.
- Facilities is working toward substantial completion of the White Pond Improvement Project by June 17, 2022.
- Reviewing applications for custodian position.

Sustainability

- Sustainability is working with Facilities to see if it can advance some electrification projects in Town buildings to include Town Hall, Fire Station 1, and Knox Trail. It is also working on adding several EV Chargers at the Keyes Road campus.
- Sustainability met with Interim Town Manager Kerry Lafleur, CMLP Director Dave Wood, and Facilities Director Ryan Orr this week to do some planning for advancing the requests of Article 38 on Town owned solar.
- In addition, the Sustainability Director had a meeting with SDA on the solar at CMS. We will be able to achieve net zero with the solar on site with the current design. This is likely to be discussed at an upcoming Light Board meeting.
- CSEC’s final event for their series is this weekend at Harvey Wheeler, for more information visit: <https://www.coolerconcord.org/events/325>

Emergency Services

Police Department

Log Items 749

Traffic Enforcement 41

Motor Vehicle Stops 112

Arrests 4

The Department participated in the Memorial Day ceremonies and aided with traffic control for the events.

Public Works

Solid Waste and Recycling Program: The Public Works Commission will be holding a Solid Waste and Recycling Program & Subscription Rate Hearing on Wednesday, June 8 at 4PM. The curbside program is rate funded, with some additional services supported by grants. Concord's curbside solid waste & recycling program rates continue to be less than rates charged by private contractors for similar service. In addition, curbside customers are able to attend one Household Hazardous Waste Collection Event each year at no additional cost, a value of \$40-\$62. While Solid Waste & Recycling is not technically an Enterprise Fund, it operates in much the same fashion and does not receive funding from real estate tax bills. CPW proposes no rate increase for FY23.

Roads Program Update:

- Commonwealth Avenue - National Grid is editing its traffic management plan based on the review by Concord Police and Public Works. A final schedule for their work will follow after the Town accepts the traffic plan. CPW met with the Concord Business Partnership to give an overview of the construction work planned for Commonwealth Ave this year.
- Hubbard Street – The installation of granite curbing has been occurring for the past several days. The construction of sidewalk ramps will follow.
- Roadway Improvement Project – spot milling of the pavement and shimming with asphalt on Barrett's Mill Rd, Hildreth Ln, Farmer's Cliff Rd and Annursnac Hill Rd occurred this week in preparation for the application of asphalt rubber chip seal finish layer for the entire road length.

Annual Drinking Water Quality Report Available: The Division finalized the 2021 Annual Water Quality Report, which is now available to view, download, or print at www.concordma.gov/wqreport.pdf. This report contains important information about the source and quality of Concord's drinking water, as well as conservation messaging, details on Division programs, and highlights of activities completed within the Division in the past year. A notice about the availability of this report will be provided to all bill-paying customers as a message on the water bill for the month of June. Non bill-paying customers will be notified via an upcoming mailing to all postal patrons, a News & Notice email and/or a press release in the Concord Journal.

Department of Planning & Land Management

Planning Division

- **Housing Production Plan – virtual Public Forum scheduled for June 7!** The purpose of the Housing Production Plan (HPP) is to help Concord find the best ways to meet its housing needs and shape the location, type, and design of development. The HPP will consider best practices to help promote diverse housing options that are sensitive to the community context and capacity. Join the Town's project team for a virtual **Community Forum on Tuesday, June 7 at 7:00pm**. This online event is free and open to the public. To register type this link into a browser: www.concordma.gov/hpppublicforum



Natural Resources Division

- **Willard Service Day on the Bruce Freeman Rail Trail:** Natural Resources Director Delia Kaye and DPLM Director Marcia Rasmussen worked with an enthusiastic group of 5th graders to remove black swallow-wort, artemisia and Japanese Knot-weed from the serpentine path next to Powder Mill Road. The students learned a lot about these invasive species. Other members of the group helped clear locations for future planting of pollinator plants (columbine, coneflower and aster). We were delighted and so grateful for these students' efforts!



Economic Vitality & Tourism Division

- On Thursday June 2 we welcomed over 150 students ages 10-15 at the Visitor Center through two Educational Tour groups with WorldStrides and one group of Boy Scouts from New Jersey.
- There have been 3 advance bookings for the new traveling performance of “Between Us Sisters”; Newbury Court, Concord Free Public Library and Concord Recreation for Camp.
- The Concord Bike share jumped from 26 to 40 rentals from April to May and from \$60 to \$150 in revenue.

Health Division

- **White Pond Watershed page on Town website:** It may be challenging to find until more people search for White Pond Watershed, but the new page is active and can be found here: <https://concordma.gov/3039/White-Pond-Watershed>.
- **Health Division staff** continued the week with soil evaluations, system inspections, pool inspections & food inspections. All beach water quality testing contracts have been executed. We are experiencing a high volume of title 5 building requests, municipal sewer reviews prior to building permits, and high amounts of onsite waste-water plans.
- **Summer camp inspections** in Concord and Lincoln have been scheduled.
- **COVID Updates are provided below:**

Confirmed and probable COVID Cases **May 19-May 26, 2022**

Source: *Massachusetts Virtual Epidemiologic Network (MAVEN)*

| | <18 years | >18 years | Total |
|----------|-----------|-----------|-------|
| Lincoln | 7 | 9 | 16 |
| Carlisle | 2 | 8 | 10 |
| Concord | 31 | 44 | 75 |

Confirmed and probable COVID Cases May 26-June 2, 2022
Source: Massachusetts Virtual Epidemiologic Network (MAVEN)

| | <18 years | >18 years | Total |
|----------|-----------|-----------|-------|
| Lincoln | 7 | 6 | 13 |
| Carlisle | 4 | 18 | 22 |
| Concord | 28 | 26 | 53 |

Human Services

Minuteman Media Network

- CCHS graduation is this coming Saturday. Picking up rental wireless video transmitters Thursday, and getting everything ready Friday, for a 7:00AM start on Saturday.
- MMN is working on several projects with community groups and helping to start a new television program for Concord News, more to come!
- MMN will be attending the June 17th Mass Access Conference in Framingham

COA

- Due to rising Covid cases and in consultation with Public Health Officials, the COA has reinstated a mask requirement at the Harvey Wheeler Community Center. Wednesday in person lunches have been temporarily suspended. The policy will be re-evaluated the week of June 13.
- Call the COA at 978-318-3020 to sign up for the following:
 - TED Talk for June: “Moral Behavior in Animals”. Wednesday, June 8 at 10:00AM
 - A&W Ukulele Players Performance, June 14 at 2:00PM
 - World of Dolls on Thursday, June 23 at 1:00PM
 - Annual Ice Cream Social, Thursday June 30 at 2:00PM
- On Tuesday, June 21 the COA will offer appointments for Concord seniors to sign up to bring up to a 1.5 inch stack of sensitive papers to be shredded. Limit one appointment per household. You must sign up in advance.
- The COA is offering appointments for a Fall Risk Assessment with geriatric physical therapist, Dr. Tami DeAngelis. Dates will be Wednesday, June 15 and Wednesday, June 22. Call to sign up.
- We are taking names of Concord seniors interested in participating in a variety of support groups that we intend to offer. Please call to express your interest. Topics include, but are not limited to: depression, anxiety, grief and loss, isolation, coping with changes related to independence and aging, coping with the effects of the pandemic and coping with difficult relationships.

Concord Middle School Building Committee Quarterly Update

May of 2022

The Concord Middle School Building Committee (CMSBC) was charged by the Select Board to undertake a feasibility study that explores the construction of a single new middle school building to replace the two existing facilities. The Committee completed the feasibility study and Schematic Design process for a new school building which provided Concord residents with the analysis, a detailed design, project budget, and the information necessary to make an informed decision on funding the middle school construction project. In January of 2022, residents overwhelmingly approved moving forward with the project at Town Meeting and the Special Election.

Following those approvals, the CMSBC started the Design Development phase of the project. As they began the next phase, the Committee welcomed new members Stephen Stasheski, who is a community volunteer with construction experience, and Kelly LaFleur who is serving as the Interim Town Manager. The Concord Select Board also extended the term of Heather Bout for the duration of the project as she originally served on the CMSBC as a member of the School Committee.

Early Design Development tasks undertaken included further discussions with the Superintendent and staff at the Concord Middle School regarding educational programming, performing a traffic study, and performing geotechnical and geo-environmental investigations.

During this period, the design and owner's project manager teams met with multiple Town of Concord departments such as Engineering, Water, Public Works, Fire, public school facilities, and the Board of Health to coordinate connecting the new facility to town infrastructure and the approach for the building's septic system.

Committee members also reviewed an overview of the proposed mechanical, engineering, and plumbing plans, commonly referred to as MEP. This review included discussing heating and cooling units, lighting design, the emergency generator, and the energy recovery units. Review of these elements will continue at the Sustainability Subcommittee as they impact the project's sustainability goals of reducing emissions, saving energy, and providing high quality air for building occupants.

The Committee also reviewed the project's site plan and landscaping as it relates to vehicle circulation on the site including bus parking, pick-up, drop-off, and loading functions. A draft traffic study was received that indicated that no mitigation was required and confirming circulation patterns for the project. Draft geotechnical reports indicate that the site's existing soils can be re-used if managed properly on the site which is good news as the project will not have to absorb the costs of trucking the material off site and paying to place it in an appropriate landfill.

Other tasks underway include a discussion of the building's interior design features such as palate and materials for the common spaces, auditorium, and cafeteria. This discussion will continue in the Building Committee's future meetings.

The Committee and project team are developing a Design Development cost estimate package that will be reviewed by independent estimating firms to ensure that the project remains on track to achieve its approved budget. As part of their on-going work, Committee members will continue to work to identify areas for savings as identified in the open value management log which contains items related to on-site soil management, air circulation, and acoustical screening equipment on the roof.

Project Schedule

Committee members reviewed the project schedule and necessary milestones going forward as they undertake the work to complete the project on time and within budget. The schedule includes the following phases:

- Design Development and Construction Drawings: February of 2022-February of 2023
- Pre-qualifying vendors, bidding and awarding of bids: October of 2022-April of 2023
- Construction: May of 2023-December of 2024
- Punch list and Move in: December of 2024-April of 2025
- Demolition of existing buildings and installation of new fields: April of 2025- November of 2025

80 Thoreau Outdoor Seating Application Appendix

For 80 Thoreau's outdoor seating area, the dining area will adhere to all parameters of 80 Thoreau's current indoor operations. Hours of operation will be Tuesday – Saturday from 5 – 10:45pm. Alcohol will be served, as it is indoors and has been served outdoors in 2020 and 2021. There will be no entertainment. The dining area is a 30' x 15' space on the raised platform area spanning the front of the Concord Depot (only using one side of the platform). The dining area allows full, unobstructed access to other businesses in the building, and is handicap-accessible. No public space will be occupied.

The outdoor dining area will be cleaned and broken down/put away at the end of every dinner service. As a full-service restaurant, staff handles all trash that may be created during the meal – guests have no waste to be responsible for.

No new signage will be involved in the outdoor seating area, and no traffic plan is required, as there are no parking lots or driveways being used.

**TOWN OF CONCORD
SEASONAL OUTDOOR RESTAURANT SEATING
APPLICATION**

The undersigned hereby applies for the addition of seasonal outdoor restaurant seating in accordance with the Town's policies and regulations.

Name of Applicant: Andrew Long

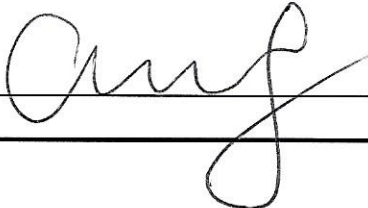
Name of Business: 80 Thoreau, LLC

Business d/b/a: n/a

Address: 80 Thoreau St. Concord

Business Phone: 978 318 0008 **Home/Cell Phone:** 978 505 0658

Email Address: andrew@80thoreau.com

Applicant Signature: 

APPROVAL: Prior to the addition of seasonal outdoor restaurant seating, the applicant must receive final approval from the Select Board. Please return your completed application to Michael Gibbons at mgibbons@concordma.gov.

REQUIRED MATERIALS

Applications will not be accepted without each of the following items. Please include this completed checklist with your application.

| | |
|-------------------------------------|---|
| <input checked="" type="checkbox"/> | A completed copy of the outdoor seating application. |
| <input checked="" type="checkbox"/> | A written description of what the restaurant is proposing for outside seating, operating hours, serving alcohol, and any entertainment. |
| <input checked="" type="checkbox"/> | A plan for the proposed outdoor seating showing the location, spacing and number of seats, tables, umbrellas, tents, barriers, planters, and adjacent features. A drawing of the proposed seating to scale (such as 1/4-inch equals 1-foot). Staff will evaluate the plan for pedestrian accessibility, access for fire and emergency response and sight lines for pedestrians and vehicles. Use of parking lots will show the impact on existing parking spaces and that proper circulation is retained. |
| <input checked="" type="checkbox"/> | Describe plan to clean public spaces occupied and remove trash. |
| <input checked="" type="checkbox"/> | Any new signage being proposed. Additional signage must comply with existing zoning regulations . Signs in the right-of-way must be limited to menu boards. Advertising of products and services other than those provided by the establishment are prohibited in the public space occupied. |
| <input checked="" type="checkbox"/> | Written authorization from the owner of the property approving the applicants plan for outdoor restaurant dining. |
| <input checked="" type="checkbox"/> | A proposed traffic flow plan, and any safety barriers that would be put in place (If requesting use of the public right of way or parking lots). |
| <input checked="" type="checkbox"/> | Insurance/bond certificate (if using public land). |
| <input checked="" type="checkbox"/> | A signed Hold Harmless Agreement (on page 4). |

Additional Resources

[Safety standards for Massachusetts Restaurants](#)

[Massachusetts COVID-19 Restaurant Checklist](#)

[Alcoholic Beverages Control Commission Guidelines for Extension of Premises to Patio and Outdoor Areas](#)

TOWN OF CONCORD
Hold Harmless Agreement
For Seasonal Outdoor Restaurant Seating

In consideration of being issued a permit for the use of the public right-of-way (hereinafter referred to as the "property" for an outdoor restaurant, the undersigned applicant (hereinafter referred to as the "permittee") agrees to indemnify, defend, save, and hold harmless the Town of Concord (hereinafter referred to as the, "Town") its officers and employees, from any and all

claims, lawsuits, damages, and cause of action, which may arise out of the permittee's activity on the outdoor premises, and for any loss or damage arising out of the use, or the discontinuance of any use.

The undersigned agrees and understands that the use of the property is temporary for the season (April 1 through October 31 unless otherwise extended by the Select Board); that the undersigned does not acquire any right, title, or interest in such property, that the undersigned may be required by the Town at any time to vacate all or any part of the property that the undersigned has been given permission to use; that upon demand to vacate such property, the undersigned agrees to properly remove any personal property placed thereon by the undersigned and to return the property to the same condition that it was in prior to commencement of such use or to reimburse the Town for the cost of removing such property and restoring the property to its prior condition and that the undersigned has no recourse against either the Town or its officers, employees or agents, either for any loss or damage occasioned by his or her being required to vacate all or any part of the property which the undersigned has been granted permission to use.

The undersigned further agrees at all times hereafter to comply with all municipal ordinances, rules, and regulations of the Town of Concord, Massachusetts.

Name of Business: 80 Thoreau
Signature of Permittee: *[Handwritten Signature]*
Printed Name of Permittee: Andrew Long
Date: 5/23/22

TOWN STAFF USE ONLY

Town Manager: _____

Recommend Approval:

Recommend Additional Town Staff Review:

Remarks: _____

Building Commissioner: _____

Approved: Disapproved:

Number of Approved Seats _____

Remarks: _____

Public Health Director: _____

Approved: Disapproved:

Remarks: _____

CPW – Town Engineer: _____

Approved: Disapproved:

Remarks: _____

Police Chief: _____

Approved: Disapproved:

Remarks: _____

Fire Chief: _____

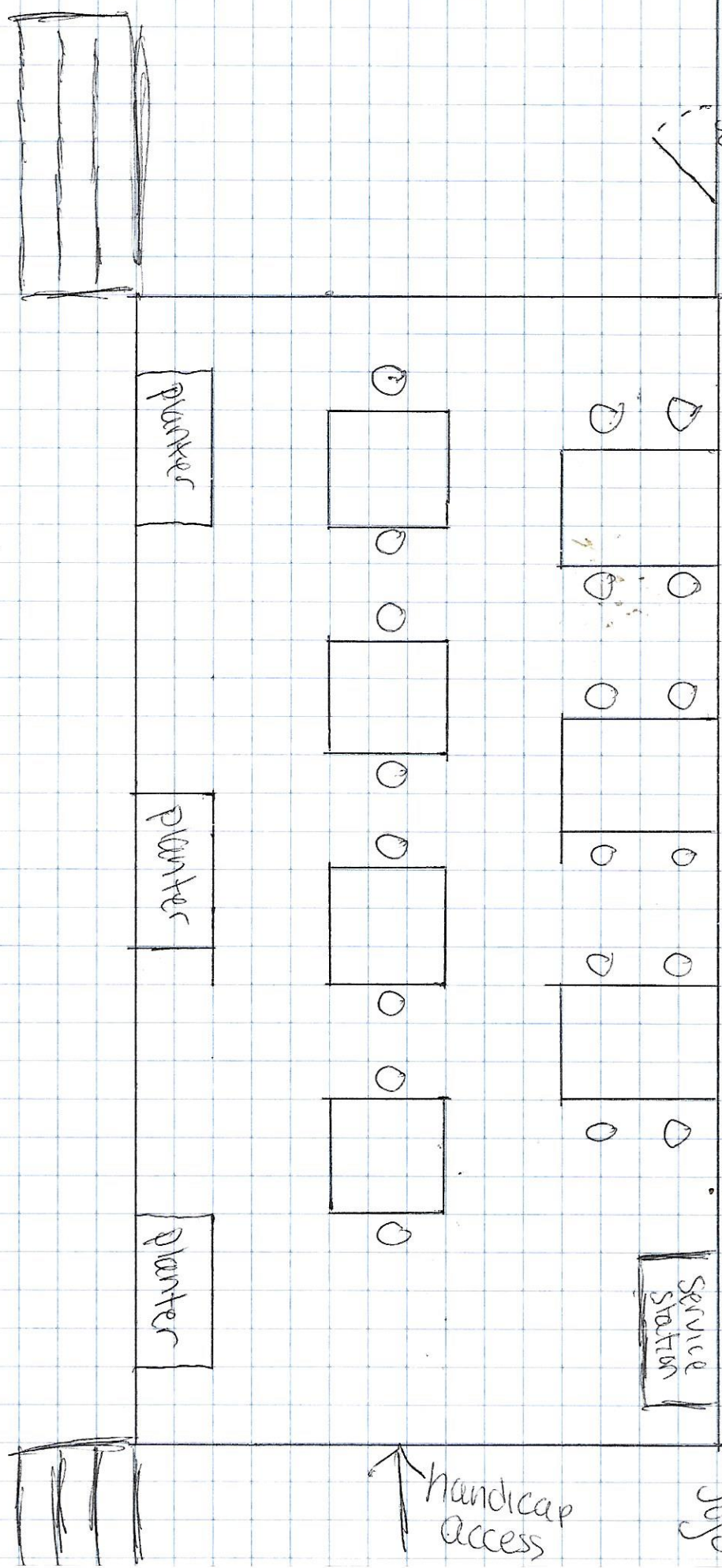
Approved: Disapproved:

Remarks: _____

(84 Thomas St)

Service entrance

□ = 1'



Drive way

handicap access

Top

PERIOD RT LLC

July 10, 2020

ATT: Jeremy Romanul, Senior Administrative Assistant
To the Concord Select Board
TOWN OF CONCORD
22 Monument Square
PO Box 535
Concord, MA 01742

E: jromanul@concordma.gov

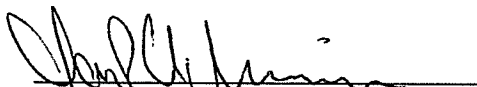
RE: 80 Thoreau LLC


Dear Jeremy,

As the managers of the Period RT LLC that own the Concord Depot on Thoreau Street, we are writing to formally notify you we fully support Ian Calhoun and 80 Thoreau's use of the front driveway area for outdoor seating. We have reviewed and approve Ian's plan. As we all know, these continue to be trying and challenging times for everyone, but in particular for our locally owned businesses. Whatever accommodations and support the Town can permit for their survival, would be greatly appreciated. We believe for the past 10 years Ian and 80 Thoreau, have served Concord well and have proven themselves as responsible business owners.

Let us know if you have any questions.

Sincerely,


James P. DiGiovanni, Manager


Vincent G. MacNutt, Manager


Mary Ann DiGiovanni, Manager

PO Box 1130
Concord, MA 01742

T: 978-369-1827
F: 978-369-2218

Town of Concord
Finance Department
Memorandum

TO: Select Board

FROM: Kerry A. Laffeur, Interim Town Manager

SUBJ: 2022 Bond Sale

DATE: June 1, 2022

On May 24, 2022, the Town received competitive bids from bond underwriters for a \$19,970,000, new money bond issue with maturities ranging from 5 - 20 years.

The Town received a total of eleven- (11) bids on the Bonds, including 3 from underwriters not previously bidding on Town of Concord bonds. Bids were ranked by lowest True Interest Cost (TIC), with the winning bid received from Morgan Stanley & Co. LLC. This original bid provides coupon rates of 4 and 5%, and a True Interest Cost of 3.288188%, including a premium of \$1,805,393.03. All bids are summarized in the tabulation below.

| | Bidder | TIC | Premium |
|----|---------------------------------|------------|-----------------|
| 1 | Morgan Stanley & Co. LLC | 3.288188 | \$ 1,805,393.03 |
| 2 | J. P. Morgan Securities LLC | 3.290317 | \$ 1,270,303.04 |
| 3 | Piper Sandler & Company | 3.299354 | \$ 1,107,493.64 |
| 4 | CitiGroup Global Markets, Inc. | 3.344716 | \$ 1,192,783.55 |
| 5 | Robert W. Baird & Company, Inc. | 3.350041 | \$ 1,720,234.14 |
| 6 | Janney Montgomery Scott LLC | 3.365289 | \$ 1,545,951.20 |
| 7 | StoneX Financial, Inc. | 3.373856 | \$ 1,405,071.15 |
| 8 | USB Financial Services, Inc. | 3.376335 | \$ 1,677,097.56 |
| 9 | B of A Securities | 3.380545 | \$ 2,211,559.29 |
| 10 | KeyBanc Capital Markets | 3.436856 | \$ 1,030,498.95 |
| 11 | BNYMellon Capital Markets | 3.449364 | \$ 1,522,690.35 |
| | | | |
| | spread: | 0.161176 | |

As is allowed within the authorization for each of the capital items included in this issue, the bond issue has been resized to account for the premium. The resized bond issue is \$18,405,000, with a resized premium of \$1,726,133.20. Of this amount, \$1,565,000 is used

to resize the issue, \$157,470.04 will pay for the issuance costs of \$157,470.04, with a remaining amount of \$3,663.16 due to the size of the bond denominations. After factoring in the resize, the adjusted True Interest Cost is 3.288188%.

The Bond Proceeds will be used to finance the following projects:

| FY2022 | | DEBT AUTHORIZATION | | | | |
|--|---------------------------------------|--------------------|-------------------------|------------------------|------------------------|----------------|
| Project Number | PROJECT | ARTICLE | Included in 2022 Issue | Resized | Net Borrowed | repayment term |
| General Fund, Non-Exempt | | | | | | |
| 358 | 141 Keyes Road Renovation | 31 -2014 | \$ 400,000.00 | \$ - | \$ 400,000.00 | 10 |
| 395 | Trail Improvements | 21-2018 (2) | \$ 75,000.00 | \$ 50,000.00 | \$ 25,000.00 | 5 |
| 420 | Warner's Pond Dredging | 11-2020 | \$ 500,000.00 | \$ - | \$ 500,000.00 | 10 |
| 425 | Municipal Building Improvements, 2021 | 13-2021 | \$ 195,000.00 | \$ - | \$ 195,000.00 | 5 |
| 428 | White Pond Park Improvements | 13-2021 | \$ 500,000.00 | \$ - | \$ 500,000.00 | 10 |
| 429 | Ralph Waldo Emerson House Musuem | 13-2021 | \$ 325,000.00 | \$ 325,000.00 | \$ - | premium |
| 430 | Wamer's Pond Park Improvements | 13-2021 | \$ 1,250,000.00 | \$ - | \$ 1,250,000.00 | 10 |
| 431 | Ladder #1 Refurbishment | 13-2021 | \$ 250,000.00 | \$ - | \$ 250,000.00 | 5 |
| 432 | Self-Contained Breathing Apparatus | 13-2021 | \$ 245,000.00 | \$ - | \$ 245,000.00 | 5 |
| 433 | 2021 Roads Program | 13-2021 | \$ 1,300,000.00 | \$ - | \$ 1,300,000.00 | 10 |
| 434 | Drainage & Sidewalks | 13-2021 | \$ 450,000.00 | \$ 120,000.00 | \$ 330,000.00 | 10 |
| 435 | Heavy Equipment, Park & Tree | 13-2021 | \$ 245,000.00 | \$ - | \$ 245,000.00 | 5 |
| 436 | Heavy Equipment, Highway | 13-2021 | \$ 235,000.00 | \$ - | \$ 235,000.00 | 5 |
| total: General Fund, Non-Exempt | | | \$ 5,970,000.00 | \$ 495,000.00 | \$ 5,475,000.00 | |
| General Fund, Exempt | | | | | | |
| 437 | Middle School Construction | 01-STM-2022 | \$ 12,000,000.00 | \$ 917,000.00 | \$ 11,083,000.00 | 20 |
| Enterprise Fund | | | | | | |
| 409 | Water Main Replacement | 43-2019 | \$ 2,000,000.00 | \$ 153,000.00 | \$ 1,847,000.00 | 20 |
| total issue: | | | \$ 19,970,000.00 | \$ 1,565,000.00 | | |

We estimated the impact of the Middle School borrowing (\$12M) to have an estimated impact at median value of \$124. Based upon the results of the sale, the revised estimated impact at median value is \$123.

We are still working on gathering data of other comparable sales last week to measure against, and will present what we find at your meeting on June 6, 2022.

Prior to the sale, Moody's Investors Service, a municipal bond credit rating agency, affirmed the Town's Aaa underlying rating, the highest rating attainable. The rating agency cited a strong tax base with high residential wealth and income, healthy reserves and liquidity that is bolstered by conservative management and historical support from taxpayers for debt exclusions and overrides to the tax levy limits, a below average debt burden and aggressive contributions towards its unfunded pension and OPEB liabilities as positive credit factors.

The bid from Morgan Stanley & Co. LLC was accepted by the Interim Treasurer on behalf of the Town, subject to approval of the Select Board. At its meeting of June 6, 2022, on behalf of the Interim Treasurer, I will be seeking approval from the Select Board to approve the bond award and execute all required documents.

/kal

VOTE OF THE SELECT BOARD

I, the Clerk of the Select Board of the Town of Concord, Massachusetts (the "Town"), certify that at a meeting of the board held June 6, 2022, of which meeting all members of the board were duly notified and at which a quorum was present, the following votes were unanimously passed, all of which appear upon the official record of the board in my custody:

Voted: that the sale of the \$19,970,000 General Obligation Municipal Purpose Loan of 2022 Bonds of the Town dated June 14, 2022 (the "Bonds"), to Morgan Stanley & CO, LLC at the price of \$21,775,393.03 and accrued interest is hereby approved and confirmed. The Bonds shall be payable on January 15 of the years and in the principal amounts and bear interest at the respective rates, as follows:

| <u>Year</u> | <u>Amount</u> | <u>Interest Rate</u> | <u>Year</u> | <u>Amount</u> | <u>Interest Rate</u> |
|-------------|---------------|----------------------|-------------|---------------|----------------------|
| 2023 | \$1,330,000 | 5.00% | 2033 | \$645,000 | 5.00% |
| 2024 | 1,325,000 | 5.00 | 2034 | 645,000 | 5.00 |
| 2025 | 1,320,000 | 5.00 | 2035 | 645,000 | 5.00 |
| 2026 | 1,320,000 | 5.00 | 2036 | 645,000 | 5.00 |
| 2027 | 1,305,000 | 5.00 | 2037 | 645,000 | 4.00 |
| 2028 | 1,080,000 | 5.00 | 2038 | 645,000 | 4.00 |
| 2029 | 1,075,000 | 5.00 | 2039 | 640,000 | 4.00 |
| 2030 | 1,075,000 | 5.00 | 2040 | 640,000 | 4.00 |
| 2031 | 1,075,000 | 5.00 | 2041 | 640,000 | 4.00 |
| 2032 | 1,070,000 | 5.00 | 2042 | 640,000 | 4.00 |

Further Voted: that in connection with the marketing and sale of the Bonds, the preparation and distribution of a Notice of Sale and Preliminary Official Statement dated May 16, 2022, and a final Official Statement dated May 24, 2022 (the "Official Statement"), each in such form as may be approved by the Town Treasurer, be and hereby are ratified, confirmed, approved and adopted.

Further Voted: that the Bonds shall be subject to redemption, at the option of the Town, upon such terms and conditions as are set forth in the Official Statement.

Further Voted: that the Town Treasurer and the Select Board be, and hereby are, authorized to execute and deliver a continuing disclosure undertaking in compliance with SEC Rule 15c2-12 in such form as may be approved by bond counsel to the Town, which undertaking shall be incorporated by reference in the Bonds for the benefit of the holders of the Bonds from time to time.

Further Voted: that we authorize and direct the Town Treasurer to establish post issuance federal tax compliance procedures and continuing disclosure procedures in such forms as the Town Treasurer and bond counsel deem sufficient, or if such procedures are

currently in place, to review and update said procedures, in order to monitor and maintain the tax-exempt status of the Bonds and to comply with relevant securities laws.

Further Voted: that any certificates or documents relating to the Bonds (collectively, the “Documents”), may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document; delivery of an executed counterpart of a signature page to a Document by electronic mail in a “.pdf” file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to such Document; and electronic signatures on any of the Documents shall be deemed original signatures for the purposes of the Documents and all matters relating thereto, having the same legal effect as original signatures.

Further Voted: that each member of the Select Board, the Town Clerk and the Town Treasurer be and hereby are, authorized to take any and all such actions, and execute and deliver such certificates, receipts or other documents as may be determined by them, or any of them, to be necessary or convenient to carry into effect the provisions of the foregoing votes.

I further certify that the votes were taken at a meeting open to the public, that no vote was taken by secret ballot, that a notice stating the place, date, time and agenda for the meeting (which agenda included the adoption of the above votes) was filed with the Town Clerk and a copy thereof posted in a manner conspicuously visible to the public at all hours in or on the municipal building that the office of the Town Clerk is located or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b), at least 48 hours, not including Saturdays, Sundays and legal holidays, prior to the time of the meeting and remained so posted at the time of the meeting, that no deliberations or decision in connection with the sale of the Bonds were taken in executive session, all in accordance with G.L. c.30A, §§18-25, as amended.

Dated: June 6, 2022

Clerk of the Select Board

Certificate of Award

I, the Treasurer of the Town of Concord, Massachusetts, hereby award the \$18,405,000 General Obligation Municipal Purpose Loan of 2022 Bonds dated June 14, 2022 (the "Bonds") to the bidder submitting the bid attached hereto in accordance with the terms set forth in the attached bid and in the Notice of Sale dated May 16, 2022, relating to the Bonds, subject to the approval of this award by the Select Board.

Date: May 24, 2022


Treasurer

Bid Results

Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds

The following bids were submitted using **PARITY**[®] and displayed ranked by lowest TIC.
 Click on the name of each bidder to see the respective bids.

| Bid Award* | Bidder Name | TIC |
|--------------------------|---|----------|
| <input type="checkbox"/> | Morgan Stanley & Co, LLC | 3.288188 |
| <input type="checkbox"/> | J.P. Morgan Securities LLC | 3.290317 |
| <input type="checkbox"/> | Piper Sandler & Co | 3.299354 |
| <input type="checkbox"/> | Citigroup Global Markets Inc. | 3.344716 |
| <input type="checkbox"/> | Robert W. Baird & Co., Inc. | 3.350041 |
| <input type="checkbox"/> | Janney Montgomery Scott LLC | 3.365289 |
| <input type="checkbox"/> | StoneX Financial Inc. | 3.373856 |
| <input type="checkbox"/> | UBS Financial Services Inc. | 3.376335 |
| <input type="checkbox"/> | BofA Securities | 3.380545 |
| <input type="checkbox"/> | KeyBanc Capital Markets | 3.436856 |
| <input type="checkbox"/> | BNYMellon Capital Markets | 3.449364 |

*Awarding the Bonds to a specific bidder will provide you with the Reoffering Prices and Yields.

Upcoming Calendar Overview Result Excel

Morgan Stanley & Co, LLC - New York , NY's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,775,393.03, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.7800 | 101.867 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1000 | 104.498 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3600 | 109.024 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4200 | 111.133 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7200 | 115.531 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.7700 | 116.934 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8500 | 116.270 | |
| 01/15/2033 | 700M | 5.0000 | 2.9500 | 115.446 | |
| 01/15/2034 | 700M | 5.0000 | 3.0000 | 115.037 | |
| 01/15/2035 | 700M | 5.0000 | 3.0500 | 114.630 | |
| 01/15/2036 | 700M | 5.0000 | 3.1000 | 114.224 | |
| 01/15/2037 | 700M | 4.0000 | 3.5000 | 103.678 | |
| 01/15/2038 | 700M | 4.0000 | 3.5500 | 103.302 | |
| 01/15/2039 | 700M | 4.0000 | 3.6000 | 102.929 | |
| 01/15/2040 | 700M | 4.0000 | 3.7000 | 102.186 | |
| 01/15/2041 | 700M | 4.0000 | 3.8000 | 101.450 | |
| 01/15/2042 | 700M | 4.0000 | 3.8500 | 101.085 | |

Total Interest Cost: \$7,643,865.28
 Premium: \$1,805,393.03
 Net Interest Cost: \$5,838,472.25
 TIC: 3.288188
 Total Insurance Premium: \$0.00
 Time Last Bid Received On:05/24/2022 10:50:34 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Morgan Stanley & Co, LLC, New York , NY
 Contact: Daniel Kelly
 Title: Executive Director
 Telephone:212-761-1541
 Fax: 212-507-2510

Issuer Name: Town of Concord

Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

J.P. Morgan Securities LLC - New York , NY's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,240,303.04, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8100 | 101.849 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1300 | 104.450 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3600 | 109.024 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4200 | 111.133 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7400 | 115.383 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8800 | 116.022 | |
| 01/15/2033 | 700M | 3.3750 | 3.3900 | 99.865 | |
| 01/15/2034 | 700M | 3.3750 | 3.4900 | 98.909 | |
| 01/15/2035 | 700M | 3.5000 | 3.5800 | 99.192 | |
| 01/15/2036 | 700M | 3.6250 | 3.6600 | 99.625 | |
| 01/15/2037 | 700M | 3.6250 | 3.7300 | 98.824 | |
| 01/15/2038 | 700M | 3.7500 | 3.7900 | 99.529 | |
| 01/15/2039 | 700M | 3.7500 | 3.8400 | 98.900 | |
| 01/15/2040 | 700M | 3.8750 | 3.8900 | 99.807 | |
| 01/15/2041 | 700M | 3.8750 | 3.9200 | 99.407 | |
| 01/15/2042 | 700M | 3.8750 | 3.9600 | 98.846 | |

Total Interest Cost: \$6,985,357.29
Premium: \$1,270,303.04
Net Interest Cost: \$5,715,054.25
TIC: 3.290317
Total Insurance Premium:
Time Last Bid Received On:05/24/2022 10:59:50 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: J.P. Morgan Securities LLC, New York , NY
Contact: Jaclyn Mischler
Title: Executive Director
Telephone:212-834-7155
Fax: 917-464-9300

Issuer Name: Town of Concord

Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

Piper Sandler & Co - Minneapolis , MN's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,077,493.64, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.7500 | 101.885 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1000 | 104.498 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3800 | 108.952 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4000 | 111.225 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 3.0000 | 2.7500 | 101.699 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8000 | 116.684 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8800 | 116.022 | |
| 01/15/2033 | 700M | 3.3750 | 3.3900 | 99.865 | |
| 01/15/2034 | 700M | 3.3750 | 3.4900 | 98.909 | |
| 01/15/2035 | 700M | 3.5000 | 3.5800 | 99.192 | |
| 01/15/2036 | 700M | 3.6250 | 3.6600 | 99.625 | |
| 01/15/2037 | 700M | 3.6250 | 3.7300 | 98.824 | |
| 01/15/2038 | 700M | 3.7500 | 3.7900 | 99.529 | |
| 01/15/2039 | 700M | 3.7500 | 3.8400 | 98.900 | |
| 01/15/2040 | 700M | 3.8750 | 3.8900 | 99.807 | |
| 01/15/2041 | 700M | 3.8750 | 3.9200 | 99.407 | |
| 01/15/2042 | 700M | 3.8750 | 3.9600 | 98.846 | |

Total Interest Cost: \$6,814,669.79
 Premium: \$1,107,493.64
 Net Interest Cost: \$5,707,176.15
 TIC: 3.299354
 Total Insurance Premium: \$0.00
 Time Last Bid Received On: 05/24/2022 10:59:31 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Piper Sandler & Co, Minneapolis , MN
 Contact: Darci Doneff
 Title: Managing Director
 Telephone: 612-303-2116
 Fax:

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

Citigroup Global Markets Inc. - New York , NY's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,162,783.55, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8000 | 101.855 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1500 | 104.418 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3300 | 106.661 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.4100 | 108.844 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4700 | 110.904 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5900 | 112.456 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.7100 | 113.725 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7700 | 115.161 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8800 | 116.022 | |
| 01/15/2033 | 700M | 3.3750 | 3.3900 | 99.865 | |
| 01/15/2034 | 700M | 3.3750 | 3.4900 | 98.909 | |
| 01/15/2035 | 700M | 3.5000 | 3.5800 | 99.192 | |
| 01/15/2036 | 700M | 3.6250 | 3.6600 | 99.625 | |
| 01/15/2037 | 700M | 3.6250 | 3.7300 | 98.824 | |
| 01/15/2038 | 700M | 3.7500 | 3.7900 | 99.529 | |
| 01/15/2039 | 700M | 3.7500 | 3.8400 | 98.900 | |
| 01/15/2040 | 700M | 3.8750 | 3.8900 | 99.807 | |
| 01/15/2041 | 700M | 3.8750 | 3.9200 | 99.407 | |
| 01/15/2042 | 700M | 3.8750 | 3.9600 | 98.846 | |

Total Interest Cost: \$6,985,357.29
 Premium: \$1,192,783.55
 Net Interest Cost: \$5,792,573.74
 TIC: 3.344716
 Total Insurance Premium: \$0.00
 Time Last Bid Received On: 05/24/2022 10:56:18 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Citigroup Global Markets Inc., New York , NY
 Contact: Charles Reed
 Title: Director
 Telephone: 212-723-7205
 Fax: 212-723-8951

Issuer Name: Town of Concord

Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

Robert W. Baird & Co., Inc. - Red Bank , NJ's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,690,234.14, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8100 | 101.849 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1300 | 104.450 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3500 | 106.609 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.4100 | 108.844 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4700 | 110.904 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5900 | 112.456 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.7100 | 113.725 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7700 | 115.161 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8800 | 116.022 | |
| 01/15/2033 | 700M | 5.0000 | 2.9400 | 115.528 | |
| 01/15/2034 | 700M | 5.0000 | 2.9600 | 115.364 | |
| 01/15/2035 | 700M | 5.0000 | 2.9800 | 115.201 | |
| 01/15/2036 | 700M | 5.0000 | 3.0100 | 114.955 | |
| 01/15/2037 | 700M | 4.0000 | 3.6000 | 102.929 | |
| 01/15/2038 | 700M | 4.0000 | 3.7000 | 102.186 | |
| 01/15/2039 | 700M | 4.0000 | 3.8600 | 101.012 | |
| 01/15/2040 | 700M | 4.0000 | 3.9000 | 100.720 | |
| 01/15/2041 | 700M | 4.0000 | 3.9500 | 100.358 | |
| 01/15/2042 | 700M | 4.0500 | 4.0000 | 100.357 | |

Total Interest Cost: \$7,650,720.42
 Premium: \$1,720,234.14
 Net Interest Cost: \$5,930,486.28
 TIC: 3.350041
 Total Insurance Premium: \$0.00
 Time Last Bid Received On:05/24/2022 10:58:37 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Robert W. Baird & Co., Inc., Red Bank , NJ
 Contact: charles massaro
 Title: director
 Telephone:732-576-4410
 Fax: 732-576-4420

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

Janney Montgomery Scott LLC - Philadelphia , PA's Bid



Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,515,951.20, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|----------------------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.7900 | 101.861 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1100 | 104.482 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3900 | 108.916 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4200 | 111.133 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7700 | 115.161 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.9300 | 115.610 | |
| 01/15/2033 | 700M | 5.0000 | 3.0400 | 114.711 | |
| 01/15/2034 | 700M | 5.0000 | 3.0600 | 114.548 | |
| 01/15/2035 | 700M | 4.0000 | 3.3800 | 104.584 | |
| 01/15/2036 | 700M | 4.0000 | 3.5100 | 103.602 | |
| 01/15/2037 | 700M | 4.0000 | 3.6300 | 102.705 | |
| 01/15/2038 | 700M | 4.0000 | 3.7000 | 102.186 | |
| 01/15/2039 | 700M | 4.0000 | 3.8000 | 101.450 | |
| 01/15/2040 | | | | | |
| 01/15/2041 | | | | | |
| 01/15/2042 | 2,100M | 4.0000 | 4.0500 | 99.325 | |

Total Interest Cost: \$7,460,659.72
 Premium: \$1,545,951.20
 Net Interest Cost: \$5,914,708.52
 TIC: 3.365289
 Total Insurance Premium:
 Time Last Bid Received On:05/24/2022 10:55:01 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: Janney Montgomery Scott LLC, Philadelphia , PA
 Contact: Lauren Carter
 Title:
 Telephone:215-665-6521
 Fax: 215-557-8648

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

StoneX Financial Inc. - Atlanta , GA's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,375,071.15, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8300 | 101.838 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1200 | 104.466 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3800 | 108.952 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4200 | 111.133 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7500 | 115.309 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8300 | 116.435 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.9100 | 115.775 | |
| 01/15/2033 | 700M | 4.0000 | 3.2000 | 105.962 | |
| 01/15/2034 | 700M | 4.0000 | 3.3000 | 105.194 | |
| 01/15/2035 | 700M | 4.0000 | 3.4000 | 104.433 | |
| 01/15/2036 | 700M | 4.0000 | 3.5000 | 103.678 | |
| 01/15/2037 | 700M | 4.0000 | 3.6000 | 102.929 | |
| 01/15/2038 | 700M | 4.0000 | 3.7000 | 102.186 | |
| 01/15/2039 | 700M | 4.0000 | 3.7500 | 101.818 | |
| 01/15/2040 | 700M | 4.0000 | 3.8000 | 101.450 | |
| 01/15/2041 | 700M | 4.0000 | 3.8500 | 101.085 | |
| 01/15/2042 | 700M | 4.0000 | 3.9000 | 100.720 | |

Total Interest Cost: \$7,305,454.17
 Premium: \$1,405,071.15
 Net Interest Cost: \$5,900,383.02
 TIC: 3.373856
 Total Insurance Premium: \$0.00
 Time Last Bid Received On: 05/24/2022 10:59:31 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: StoneX Financial Inc., Atlanta , GA
 Contact: Tony Posthauer
 Title: Underwriter
 Telephone: 470-378-3390
 Fax:

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

UBS Financial Services Inc. - New York , NY's Bid



Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,647,097.56, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8100 | 101.849 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1300 | 104.450 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.4200 | 108.808 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.5400 | 110.584 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5600 | 112.623 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.7100 | 113.725 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7700 | 115.161 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8800 | 116.022 | |
| 01/15/2033 | 700M | 5.0000 | 2.9400 | 115.528 | |
| 01/15/2034 | 700M | 5.0000 | 2.9600 | 115.364 | |
| 01/15/2035 | 700M | 5.0000 | 2.9800 | 115.201 | |
| 01/15/2036 | 700M | 5.0000 | 3.0100 | 114.955 | |
| 01/15/2037 | 700M | 4.0000 | 3.8000 | 101.450 | |
| 01/15/2038 | 700M | 4.0000 | 3.9000 | 100.720 | |
| 01/15/2039 | 700M | 4.0000 | 4.0000 | 100.000 | |
| 01/15/2040 | 700M | 4.0000 | 4.0500 | 99.372 | |
| 01/15/2041 | 700M | 4.0000 | 4.1000 | 98.705 | |
| 01/15/2042 | 700M | 4.0000 | 4.1500 | 97.999 | |

Total Interest Cost: \$7,643,865.28
Premium: \$1,677,097.56
Net Interest Cost: \$5,966,767.72
TIC: 3.376335
Total Insurance Premium:
Time Last Bid Received On:05/24/2022 10:59:51 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: UBS Financial Services Inc., New York , NY
Contact: Michael Ciliento
Title: Executive Director
Telephone:212-713-3000
Fax:

Issuer Name: Town of Concord

Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

BofA Securities - New York , NY's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$22,181,559.29, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|---------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.7600 | 101.879 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.0800 | 104.530 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3600 | 109.024 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4200 | 111.133 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7600 | 115.235 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.9300 | 115.610 | |
| 01/15/2033 | 700M | 5.0000 | 2.9900 | 115.119 | |
| 01/15/2034 | 700M | 5.0000 | 3.0100 | 114.955 | |
| 01/15/2035 | 700M | 5.0000 | 3.0300 | 114.792 | |
| 01/15/2036 | 700M | 5.0000 | 3.0700 | 114.467 | |
| 01/15/2037 | 700M | 5.0000 | 3.1000 | 114.224 | |
| 01/15/2038 | 700M | 5.0000 | 3.1300 | 113.981 | |
| 01/15/2039 | 700M | 5.0000 | 3.1600 | 113.739 | |
| 01/15/2040 | 700M | 5.0000 | 3.1800 | 113.578 | |
| 01/15/2041 | 700M | 5.0000 | 3.1900 | 113.498 | |
| 01/15/2042 | 700M | 5.0000 | 3.2100 | 113.337 | |

Total Interest Cost: \$8,361,481.94
 Premium: \$2,211,559.29
 Net Interest Cost: \$6,149,922.65
 TIC: 3.380545
 Total Insurance Premium:
 Time Last Bid Received On: 05/24/2022 10:59:01 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: BofA Securities, New York , NY
 Contact: Robert Holmes
 Title:
 Telephone: 212-449-5081
 Fax:

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

KeyBanc Capital Markets - Cleveland , OH's Bid



Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,000,498.95, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|----------------------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8100 | 101.849 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1300 | 104.450 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 4.4000 | 101.966 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4600 | 110.949 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7900 | 115.013 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8200 | 116.518 | |
| 01/15/2032 | 1,125M | 3.4000 | 3.3500 | 100.368 | |
| 01/15/2033 | 700M | 3.5000 | 3.4200 | 100.588 | |
| 01/15/2034 | 700M | 3.6250 | 3.5200 | 100.769 | |
| 01/15/2035 | 700M | 3.6250 | 3.6200 | 100.034 | |
| 01/15/2036 | 700M | 3.7500 | 3.7500 | 100.000 | |
| 01/15/2037 | 700M | 3.8000 | 3.7700 | 100.215 | |
| 01/15/2038 | 700M | 3.8750 | 3.8200 | 100.396 | |
| 01/15/2039 | 700M | 3.8750 | 3.8600 | 100.106 | |
| 01/15/2040 | | | | | |
| 01/15/2041 | | | | | |
| 01/15/2042 | 2,100M | 4.0000 | 3.9000 | 100.720 | |

Total Interest Cost: \$6,960,053.75
 Premium: \$1,030,498.95
 Net Interest Cost: \$5,929,554.80
 TIC: 3.436856
 Total Insurance Premium:
 Time Last Bid Received On:05/24/2022 10:47:45 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: KeyBanc Capital Markets, Cleveland , OH
 Contact: Robert Bond
 Title: Managing Director
 Telephone:720-904-4571
 Fax:

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

Upcoming Calendar Overview Result Excel

BNYMellon Capital Markets - Pittsburgh , PA's Bid



**Concord (Town)
\$19,970,000 General Obligation Municipal Purpose Loan of 2022
Bonds**

For the aggregate principal amount of \$19,970,000.00, we will pay you \$21,492,690.35, plus accrued interest from the date of issue to the date of delivery. The Bonds are to bear interest at the following rate(s):

| Maturity Date | Amount \$ | Coupon % | Yield % | Dollar Price | Bond Insurance |
|----------------------------|-----------|----------|---------|--------------|----------------|
| 01/15/2023 | 1,475M | 5.0000 | 1.8100 | 101.849 | |
| 01/15/2024 | 1,475M | 5.0000 | 2.1300 | 104.450 | |
| 01/15/2025 | 1,470M | 5.0000 | 2.3000 | 106.739 | |
| 01/15/2026 | 1,470M | 5.0000 | 2.3700 | 108.988 | |
| 01/15/2027 | 1,450M | 5.0000 | 2.4300 | 111.087 | |
| 01/15/2028 | 1,130M | 5.0000 | 2.5400 | 112.734 | |
| 01/15/2029 | 1,125M | 5.0000 | 2.6600 | 114.049 | |
| 01/15/2030 | 1,125M | 5.0000 | 2.7500 | 115.309 | |
| 01/15/2031 | 1,125M | 5.0000 | 2.8100 | 116.601 | |
| 01/15/2032 | 1,125M | 5.0000 | 2.8900 | 115.940 | |
| 01/15/2033 | 700M | 5.0000 | 2.9600 | 115.364 | |
| 01/15/2034 | 700M | 5.0000 | 3.0000 | 115.037 | |
| 01/15/2035 | 700M | 5.0000 | 3.0600 | 114.548 | |
| 01/15/2036 | 700M | 3.8750 | 3.8750 | 100.000 | |
| 01/15/2037 | | | | | |
| 01/15/2038 | | | | | |
| 01/15/2039 | 2,100M | 4.0000 | 4.0000 | 100.000 | |
| 01/15/2040 | | | | | |
| 01/15/2041 | | | | | |
| 01/15/2042 | 2,100M | 4.1250 | 4.1250 | 100.000 | |

Total Interest Cost: \$7,585,663.19
 Premium: \$1,522,690.35
 Net Interest Cost: \$6,062,972.84
 TIC: 3.449364
 Total Insurance Premium:
 Time Last Bid Received On:05/24/2022 10:47:58 EDST

This proposal is made subject to all of the terms and conditions of the Official Bid Form, the Official Notice of Sale, and the Preliminary Official Statement, all of which are made a part hereof.

Bidder: BNYMellon Capital Markets, Pittsburgh , PA
 Contact: Andrew Richless
 Title: Trader
 Telephone:212-815-8282
 Fax:

Issuer Name: Town of Concord Company Name: _____

Accepted By: _____ Accepted By: _____

SOURCES AND USES OF FUNDS

Town of Concord, Massachusetts
 General Obligation Municipal Purpose Loan of 2022 Bonds dated June 14, 2022

Dated Date 06/14/2022
 Delivery Date 06/14/2022

| Sources: | General Fund (non-exempt) | General Fund (exempt) | Water Fund | Total |
|--------------------------------|------------------------------|--------------------------|--------------|---------------|
| Bond Proceeds: | | | | |
| Par Amount | 5,475,000.00 | 11,083,000.00 | 1,847,000.00 | 18,405,000.00 |
| Premium | 543,085.20 | 1,013,913.81 | 169,134.19 | 1,726,133.20 |
| | 6,018,085.20 | 12,096,913.81 | 2,016,134.19 | 20,131,133.20 |
| Uses: | | | | |
| Project Fund Deposits: | | | | |
| New Money | 5,970,000.00 | 12,000,000.00 | 2,000,000.00 | 19,970,000.00 |
| Delivery Date Expenses: | | | | |
| Cost of Issuance | 33,239.67 | 67,286.84 | 11,213.49 | 111,740.00 |
| Underwriter's Discount | 13,603.49 | 27,537.41 | 4,589.14 | 45,730.04 |
| | 46,843.16 | 94,824.25 | 15,802.63 | 157,470.04 |
| Other Uses of Funds: | | | | |
| Net Premium | 1,242.04 | 2,089.56 | 331.56 | 3,663.16 |
| | 6,018,085.20 | 12,096,913.81 | 2,016,134.19 | 20,131,133.20 |

CREDIT OPINION

7 May 2020

 Rate this Research

Contacts

Nicholas Lehman +1.617.535.7694
 VP-Senior Analyst
 nicholas.lehman@moodys.com

Robert Weber +1.212.553.7280
 VP-Senior Analyst
 robert.weber@moodys.com

CLIENT SERVICES

| | |
|--------------|-----------------|
| Americas | 1-212-553-1653 |
| Asia Pacific | 852-3551-3077 |
| Japan | 81-3-5408-4100 |
| EMEA | 44-20-7772-5454 |

Concord (Town of) MA

Update to credit analysis

Summary

Concord (Aaa stable) benefits from a strong tax base with high residential wealth and income. The town is favorably located northwest of Boston (Aaa stable) and we expect tax base valuation to continue to grow largely from the strong residential market. The financial position is stable with healthy reserves and liquidity that is bolstered by conservative and proactive management as well as historical support from taxpayers for debt exclusions and overrides to the tax levy limits of Proposition 2½. The debt burden is below average due to the town's capital planning and debt policies. Additionally, the town remains committed to aggressive contributions toward its unfunded pension and OPEB liabilities.

We regard the coronavirus outbreak as a social risk under our ESG framework, given the substantial implications for public health and safety. We do not see any material immediate credit risks for Concord. However, the situation surrounding Coronavirus is rapidly evolving and the longer term impact will depend on both the severity and duration of the crisis. If our view of the credit quality of Concord changes, we will update our opinion at that time.

Credit strengths

- » Wealthy, favorably located tax base
- » Stable financial operations
- » Strong fiscal management
- » History of voter support for operating overrides and debt exclusions to the tax levy limit

Credit challenges

- » Rising education operating and capital costs
- » Limited revenue raising flexibility under the Proposition 2½ tax levy limit

Rating outlook

The stable outlook reflects our expectation that the town will continue to exercise conservative fiscal management to maintain a healthy financial position. The outlook also incorporates the stable tax base valuation and continuing voter support when needed to approve debt exclusions and general overrides to the Proposition 2½ tax levy limit.

Factors that could lead to an upgrade

- » Not applicable

Factors that could lead to a downgrade

- » Decline in general fund reserves and liquidity
- » Lack of voter support for large operating and capital needs
- » Material increase in the debt burden

Key indicators

Exhibit 1

| Concord (Town of) MA | 2015 | 2016 | 2017 | 2018 | 2019 |
|---|-------------|-------------|-------------|-------------|-------------|
| Economy/Tax Base | | | | | |
| Total Full Value (\$000) | \$5,540,602 | \$5,540,602 | \$6,238,215 | \$6,238,215 | \$6,572,448 |
| Population | 19,271 | 19,432 | 19,357 | 19,323 | 19,323 |
| Full Value Per Capita | \$287,510 | \$285,128 | \$322,272 | \$322,839 | \$340,136 |
| Median Family Income (% of US Median) | 237.2% | 233.2% | 228.0% | 233.6% | 233.6% |
| Finances | | | | | |
| Operating Revenue (\$000) | \$91,705 | \$93,969 | \$104,926 | \$107,046 | \$111,077 |
| Fund Balance (\$000) | \$25,116 | \$25,580 | \$25,421 | \$26,111 | \$26,674 |
| Cash Balance (\$000) | \$39,876 | \$39,604 | \$39,419 | \$40,802 | \$41,331 |
| Fund Balance as a % of Revenues | 27.4% | 27.2% | 24.2% | 24.4% | 24.0% |
| Cash Balance as a % of Revenues | 43.5% | 42.1% | 37.6% | 38.1% | 37.2% |
| Debt/Pensions | | | | | |
| Net Direct Debt (\$000) | \$41,805 | \$48,765 | \$47,525 | \$44,830 | \$36,266 |
| 3-Year Average of Moody's ANPL (\$000) | \$88,577 | \$93,494 | \$89,096 | \$95,986 | \$91,811 |
| Net Direct Debt / Full Value (%) | 0.8% | 0.9% | 0.8% | 0.7% | 0.6% |
| Net Direct Debt / Operating Revenues (x) | 0.5x | 0.5x | 0.5x | 0.4x | 0.3x |
| Moody's - adjusted Net Pension Liability (3-yr average) to Full Value (%) | 1.6% | 1.7% | 1.4% | 1.5% | 1.4% |
| Moody's - adjusted Net Pension Liability (3-yr average) to Revenues (x) | 1.0x | 1.0x | 0.8x | 0.9x | 0.8x |

As of June 30 fiscal year end

Source: Moody's Investors Service and Concord's audited financials

Profile

Concord is primarily a residential community with a population of 19,323 (2018 American Community Survey). The town is located approximately 17 miles northwest of Boston.

Detailed credit considerations

Economy and tax base: affluent, residential tax base with a long history of stable valuation

Concord's \$6.4 billion tax base (2019-20 equalized value) is expected to remain stable over the near term given timing of assessments in Massachusetts. The long term trend is also expected to remain stable given the town's history through the Great Recession and the strong housing demand that has continued today. The town is favorably located 17 miles northwest of Boston, MA (Aaa stable) and while its primarily a mature suburb (92% residential of 2020 assessed value) it does have a small commercial sector including healthcare, research and development, and office space. The 2019-20 equalized value increased 5.4% since the last state certification in 2017 and annual assessed value continues to see modest growth through 2020 with a five year compound annual growth rate of 4.5%.

This publication does not announce a credit rating action. For any credit ratings referenced in this publication, please see the ratings tab on the issuer/entity page on www.moody's.com for the most updated credit rating action information and rating history.

Town resident income levels are strong with a median family income representing almost 2.5 times the national median. Similarly, wealth levels are well above average with 2020 equalized value per capita of \$371,577, reflecting the high-end housing stock.

The coronavirus is driving an unprecedented economic slowdown. We currently forecast US GDP to decline significantly during 2020 with a gradual recovery commencing toward the end of the year. Local governments with the highest exposure to the tourism, healthcare, retail, oil and gas and international trade sectors could suffer particularly severe impacts.

Financial operations and reserves: conservative fiscal management expected to help maintain healthy position over near term

Concord's financial position is likely to remain healthy over the near term as the town works to address the economic challenges brought on by the coronavirus pandemic. The town benefits from conservative fiscal management and is bolstered by strong taxpayer support that allows for some additional operating flexibility that we expect to assist in maintaining balanced operations. The town's ability to rely on property taxes which make up 80% of general fund revenue and not have to rely as much on state aid funding and economically sensitive revenue is also a positive factor.

The fiscal 2019 audited financials reflect an operating surplus of \$673 thousand because of positive variance in revenue and expenditures ending the year on budget. The surplus increase the available general fund balance to \$26.7 million representing 24% of revenue.

The fiscal 2020 year-end operations are estimated to reflect a surplus of just over \$500 thousand given that revenue is expected to be just under budget while expenditures should yield smaller turnbacks than in prior years. The revenue shortfall is attributable to the pandemic state of emergency and a rise in expenses for overtime and healthcare equipment has been mitigated by savings from personnel retirements and conservative expense budget.

The fiscal 2021 budget is still preliminary and may not be finalized until after the start of the fiscal year on July 1 given the uncertainty of the state budget and state aid funding. The town's preliminary budget reflects a 3% increase from the prior year but the town now expects to reduce the budget by at least \$3 million in revenue to account for a decline in local receipts and state aid. The town has options on how to close a \$3 million gap but further reductions are possible and could change over the next three months.

LIQUIDITY

The cash position at the end of fiscal 2019 was \$41.3 million representing a healthy 37.2% of general fund revenue. The town's liquidity is not expected to materially change at the end of the current fiscal year.

Debt, pension and OPEB liabilities: debt burden and long term liabilities expected to remain manageable

The town will maintain an affordable debt position due to its modest net direct debt burden of 0.7% of equalized value (net of self supporting water and electric debt) and 0.4 times revenue, an aggressive repayment schedule for non-excluded debt, and a commitment to pay-as-you-go capital funding. The fiscal 2021-25 capital plan totals \$64 million with \$33 million funded with current revenue and \$27 million through borrowing. The town is likely to issue around \$4-\$6 million in debt annually. The town maintains a policy that restricts total pay-go capital spending and tax-supported, non-excluded debt service to 8% of budgeted expenditures.

DEBT STRUCTURE

The entire debt portfolio is fixed rate with strong amortization within 10 years. Fiscal 2019 general fund debt service was \$7 million representing 6.3% of expenditures.

DEBT-RELATED DERIVATIVES

Concord is not party to any derivatives or interest rate swap agreements.

PENSIONS AND OPEB

Concord's pension and OPEB liabilities are larger than the debt burden and, though manageable at this time, represent a potential future credit challenge. The town participates in the Concord Contributory Retirement System, a multi-employer defined benefit plan and makes annual required contributions based on at least its proportional share. The retirement plan is likely to be fully funded by 2029 and currently uses a 7% discount rate. The town's teachers participate in the Massachusetts Teachers Retirement System in which the town receives on-behalf payments toward the liability that is covered by the Commonwealth. The town also funds its OPEB liability

on a pay-go basis plus annual budgeted deposits into an OPEB trust. The table below summarizes the town's 2019 debt, pension and OPEB unfunded liabilities and contributions.

Exhibit 2

Concord's fiscal 2019 debt, pension and OPEB unfunded liabilities and contributions

| 2019 | Amount (\$ thousands) | % of Operating Revenues | Discount Rate |
|--|--------------------------|-------------------------|---------------|
| Operating Revenue | 111,077 | | |
| Reported Net Pension Liability | 35,129 | 31.63% | 7.00% |
| Moody's Adjusted Net Pension Liability | 76,413 | 68.79% | 4.22% |
| Reported Net OPEB Liability | 35,625 | 32.07% | 7.30% |
| Moody's Adjusted Net OPEB Liability | 66,603 | 59.96% | 3.50% |
| Pension Contribution | 5,452 | 4.91% | - |
| Pension Tread Water Gap [1] | -2,758 | -2.48% | - |
| OPEB Contribution | 3,925 | 3.53% | - |
| Net Direct Debt | 36,266 | 32.65% | - |
| Debt Service | 7,002 | 6.30% | - |
| Total Fixed Costs | 16,379 | 14.75% | - |

[1] A positive pension tread water gap reflects a pension contribution smaller than the amount required to prevent the unfunded liability from increasing if all plan assumptions are realized. A negative tread water gap reflects a contribution larger than the amount required to keep the unfunded liability from increasing if all assumptions are realized.

Source: Moody's Investors Service and Concord's audited financial statements

The town's annual pension contributions over the past five years (2016-2019) have averaged a strong 161% of the tread water indicator which is the amount required to keep the unfunded liability from increasing if all actuarial assumptions are realized. Failure to realize the assumed return on pension assets could result in larger required increases to meet the funding schedule. Additionally, the town makes aggressive annual contributions toward its OPEB liability which has a strong fiduciary net position of 34.67% of the total OPEB liability.

ESG considerations

Environmental risk is not material for the town. Concord has a medium risk to water stress and extreme rainfall but has sufficient financial and capital flexibility to address this limited exposure.

Concord's social risks are incorporated into the economy and tax base primary credit factors and discussed in the previous section above.

The town continues to adhere to conservative fiscal management practices and policies including the maintenance of reserves, capital planning and debt management.

Massachusetts towns have an Institutional Framework score of "Aa," which is strong. The sector's major revenue source of property taxes, are subject to the Proposition 2 1/2 tax levy cap which can be overridden with voter approval only. However, the cap of 2.5% still allows for moderate revenue-raising ability. Expenditures primarily consist of personnel costs, as well as education costs for towns that manage school operations, and are highly predictable given state-mandated school spending guidelines and employee contracts. Unpredictable revenue fluctuations tend to be minor, or under 5% annually. Across the sector, fixed and mandated costs are generally greater than 25% of expenditures. Fixed costs are driven mainly by debt service and pension costs. Unpredictable expenditure fluctuations tend to be minor, under 5% annually.

Rating methodology and scorecard factors

The US Local Government General Obligation Debt methodology includes a scorecard, a tool providing a composite score of a local government's credit profile based on the weighted factors we consider most important, universal and measurable, as well as possible notching factors dependent on individual credit strengths and weaknesses. Its purpose is not to determine the final rating, but rather to provide a standard platform from which to analyze and compare local government credits.

Exhibit 3

| Concord (Town of) MA | | |
|--|-----------------------------|-------|
| Scorecard Factors | Measure | Score |
| Economy/Tax Base (30%) ^[1] | | |
| Tax Base Size: Full Value (in 000s) | \$6,572,448 | Aa |
| Full Value Per Capita | \$340,136 | Aaa |
| Median Family Income (% of US Median) | 233.6% | Aaa |
| Finances (30%) | | |
| Fund Balance as a % of Revenues | 24.0% | Aa |
| 5-Year Dollar Change in Fund Balance as % of Revenues | 2.7% | A |
| Cash Balance as a % of Revenues | 37.2% | Aaa |
| 5-Year Dollar Change in Cash Balance as % of Revenues | 7.5% | A |
| Management (20%) | | |
| Institutional Framework | Aa | Aa |
| Operating History: 5-Year Average of Operating Revenues / Operating Expenditures (x) | 1.0x | A |
| Notching Factors: ^[2] | | |
| Unusually Strong or Weak Budgetary Management and Planning | | Up |
| Debt and Pensions (20%) | | |
| Net Direct Debt / Full Value (%) | 0.7% | Aaa |
| Net Direct Debt / Operating Revenues (x) | 0.4x | Aa |
| 3-Year Average of Moody's Adjusted Net Pension Liability / Full Value (%) | 1.4% | Aa |
| 3-Year Average of Moody's Adjusted Net Pension Liability / Operating Revenues (x) | 0.8x | A |
| | Scorecard-Indicated Outcome | Aa1 |
| | Assigned Rating | Aaa |

[1] Economy measures are based on data from the most recent year available. [2] Notching Factors are specifically defined in the US Local Government General Obligation Debt methodology. [3] Standardized adjustments are outlined in the GO Methodology Scorecard Inputs publication.

Source: Moody's Investors Service and US Census Bureau

© 2020 Moody's Corporation, Moody's Investors Service, Inc., Moody's Analytics, Inc. and/or their licensors and affiliates (collectively, "MOODY'S"). All rights reserved.

CREDIT RATINGS ISSUED BY MOODY'S INVESTORS SERVICE, INC. AND/OR ITS CREDIT RATINGS AFFILIATES ARE MOODY'S CURRENT OPINIONS OF THE RELATIVE FUTURE CREDIT RISK OF ENTITIES, CREDIT COMMITMENTS, OR DEBT OR DEBT-LIKE SECURITIES, AND MATERIALS, PRODUCTS, SERVICES AND INFORMATION PUBLISHED BY MOODY'S (COLLECTIVELY, "PUBLICATIONS") MAY INCLUDE SUCH CURRENT OPINIONS. MOODY'S INVESTORS SERVICE DEFINES CREDIT RISK AS THE RISK THAT AN ENTITY MAY NOT MEET ITS CONTRACTUAL FINANCIAL OBLIGATIONS AS THEY COME DUE AND ANY ESTIMATED FINANCIAL LOSS IN THE EVENT OF DEFAULT OR IMPAIRMENT. SEE MOODY'S RATING SYMBOLS AND DEFINITIONS PUBLICATION FOR INFORMATION ON THE TYPES OF CONTRACTUAL FINANCIAL OBLIGATIONS ADDRESSED BY MOODY'S INVESTORS SERVICE CREDIT RATINGS. CREDIT RATINGS DO NOT ADDRESS ANY OTHER RISK, INCLUDING BUT NOT LIMITED TO: LIQUIDITY RISK, MARKET VALUE RISK, OR PRICE VOLATILITY. CREDIT RATINGS, NON-CREDIT ASSESSMENTS ("ASSESSMENTS"), AND OTHER OPINIONS INCLUDED IN MOODY'S PUBLICATIONS ARE NOT STATEMENTS OF CURRENT OR HISTORICAL FACT. MOODY'S PUBLICATIONS MAY ALSO INCLUDE QUANTITATIVE MODEL-BASED ESTIMATES OF CREDIT RISK AND RELATED OPINIONS OR COMMENTARY PUBLISHED BY MOODY'S ANALYTICS, INC. AND/OR ITS AFFILIATES. MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS AND PUBLICATIONS DO NOT CONSTITUTE OR PROVIDE INVESTMENT OR FINANCIAL ADVICE, AND MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS AND PUBLICATIONS ARE NOT AND DO NOT PROVIDE RECOMMENDATIONS TO PURCHASE, SELL, OR HOLD PARTICULAR SECURITIES. MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS AND PUBLICATIONS DO NOT COMMENT ON THE SUITABILITY OF AN INVESTMENT FOR ANY PARTICULAR INVESTOR. MOODY'S ISSUES ITS CREDIT RATINGS, ASSESSMENTS AND OTHER OPINIONS AND PUBLISHES ITS PUBLICATIONS WITH THE EXPECTATION AND UNDERSTANDING THAT EACH INVESTOR WILL, WITH DUE CARE, MAKE ITS OWN STUDY AND EVALUATION OF EACH SECURITY THAT IS UNDER CONSIDERATION FOR PURCHASE, HOLDING, OR SALE.

MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS, AND PUBLICATIONS ARE NOT INTENDED FOR USE BY RETAIL INVESTORS AND IT WOULD BE RECKLESS AND INAPPROPRIATE FOR RETAIL INVESTORS TO USE MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS OR PUBLICATIONS WHEN MAKING AN INVESTMENT DECISION. IF IN DOUBT YOU SHOULD CONTACT YOUR FINANCIAL OR OTHER PROFESSIONAL ADVISER. ALL INFORMATION CONTAINED HEREIN IS PROTECTED BY LAW, INCLUDING BUT NOT LIMITED TO, COPYRIGHT LAW, AND NONE OF SUCH INFORMATION MAY BE COPIED OR OTHERWISE REPRODUCED, REPACKAGED, FURTHER TRANSMITTED, TRANSFERRED, DISSEMINATED, REDISTRIBUTED OR RESOLD, OR STORED FOR SUBSEQUENT USE FOR ANY SUCH PURPOSE, IN WHOLE OR IN PART, IN ANY FORM OR MANNER OR BY ANY MEANS WHATSOEVER, BY ANY PERSON WITHOUT MOODY'S PRIOR WRITTEN CONSENT.

MOODY'S CREDIT RATINGS, ASSESSMENTS, OTHER OPINIONS AND PUBLICATIONS ARE NOT INTENDED FOR USE BY ANY PERSON AS A BENCHMARK AS THAT TERM IS DEFINED FOR REGULATORY PURPOSES AND MUST NOT BE USED IN ANY WAY THAT COULD RESULT IN THEM BEING CONSIDERED A BENCHMARK.

All information contained herein is obtained by MOODY'S from sources believed by it to be accurate and reliable. Because of the possibility of human or mechanical error as well as other factors, however, all information contained herein is provided "AS IS" without warranty of any kind. MOODY'S adopts all necessary measures so that the information it uses in assigning a credit rating is of sufficient quality and from sources MOODY'S considers to be reliable including, when appropriate, independent third-party sources. However, MOODY'S is not an auditor and cannot in every instance independently verify or validate information received in the rating process or in preparing its Publications.

To the extent permitted by law, MOODY'S and its directors, officers, employees, agents, representatives, licensors and suppliers disclaim liability to any person or entity for any indirect, special, consequential, or incidental losses or damages whatsoever arising from or in connection with the information contained herein or the use of or inability to use any such information, even if MOODY'S or any of its directors, officers, employees, agents, representatives, licensors or suppliers is advised in advance of the possibility of such losses or damages, including but not limited to: (a) any loss of present or prospective profits or (b) any loss or damage arising where the relevant financial instrument is not the subject of a particular credit rating assigned by MOODY'S.

To the extent permitted by law, MOODY'S and its directors, officers, employees, agents, representatives, licensors and suppliers disclaim liability for any direct or compensatory losses or damages caused to any person or entity, including but not limited to by any negligence (but excluding fraud, willful misconduct or any other type of liability that, for the avoidance of doubt, by law cannot be excluded) on the part of, or any contingency within or beyond the control of, MOODY'S or any of its directors, officers, employees, agents, representatives, licensors or suppliers, arising from or in connection with the information contained herein or the use of or inability to use any such information.

NO WARRANTY, EXPRESS OR IMPLIED, AS TO THE ACCURACY, TIMELINESS, COMPLETENESS, MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE OF ANY CREDIT RATING, ASSESSMENT, OTHER OPINION OR INFORMATION IS GIVEN OR MADE BY MOODY'S IN ANY FORM OR MANNER WHATSOEVER.

Moody's Investors Service, Inc., a wholly-owned credit rating agency subsidiary of Moody's Corporation ("MCO"), hereby discloses that most issuers of debt securities (including corporate and municipal bonds, debentures, notes and commercial paper) and preferred stock rated by Moody's Investors Service, Inc. have, prior to assignment of any credit rating, agreed to pay to Moody's Investors Service, Inc. for credit ratings opinions and services rendered by it fees ranging from \$1,000 to approximately \$2,700,000. MCO and Moody's investors Service also maintain policies and procedures to address the independence of Moody's Investors Service credit ratings and credit rating processes. Information regarding certain affiliations that may exist between directors of MCO and rated entities, and between entities who hold credit ratings from Moody's Investors Service and have also publicly reported to the SEC an ownership interest in MCO of more than 5%, is posted annually at www.moody's.com under the heading "Investor Relations — Corporate Governance — Director and Shareholder Affiliation Policy."

Additional terms for Australia only: Any publication into Australia of this document is pursuant to the Australian Financial Services License of MOODY'S affiliate, Moody's Investors Service Pty Limited ABN 61 003 399 657AFSL 336969 and/or Moody's Analytics Australia Pty Ltd ABN 94 105 136 972 AFSL 383569 (as applicable). This document is intended to be provided only to "wholesale clients" within the meaning of section 761G of the Corporations Act 2001. By continuing to access this document from within Australia, you represent to MOODY'S that you are, or are accessing the document as a representative of, a "wholesale client" and that neither you nor the entity you represent will directly or indirectly disseminate this document or its contents to "retail clients" within the meaning of section 761G of the Corporations Act 2001. MOODY'S credit rating is an opinion as to the creditworthiness of a debt obligation of the issuer, not on the equity securities of the issuer or any form of security that is available to retail investors.

Additional terms for Japan only: Moody's Japan K.K. ("MJKK") is a wholly-owned credit rating agency subsidiary of Moody's Group Japan G.K., which is wholly-owned by Moody's Overseas Holdings Inc., a wholly-owned subsidiary of MCO. Moody's SF Japan K.K. ("MSFJ") is a wholly-owned credit rating agency subsidiary of MJKK. MSFJ is not a Nationally Recognized Statistical Rating Organization ("NRSRO"). Therefore, credit ratings assigned by MSFJ are Non-NRSRO Credit Ratings. Non-NRSRO Credit Ratings are assigned by an entity that is not a NRSRO and, consequently, the rated obligation will not qualify for certain types of treatment under U.S. laws. MJKK and MSFJ are credit rating agencies registered with the Japan Financial Services Agency and their registration numbers are FSA Commissioner (Ratings) No. 2 and 3 respectively.

MJKK or MSFJ (as applicable) hereby disclose that most issuers of debt securities (including corporate and municipal bonds, debentures, notes and commercial paper) and preferred stock rated by MJKK or MSFJ (as applicable) have, prior to assignment of any credit rating, agreed to pay to MJKK or MSFJ (as applicable) for credit ratings opinions and services rendered by it fees ranging from JPY125,000 to approximately JPY250,000,000.

MJKK and MSFJ also maintain policies and procedures to address Japanese regulatory requirements.

CLIENT SERVICES

| | |
|--------------|-----------------|
| Americas | 1-212-553-1653 |
| Asia Pacific | 852-3551-3077 |
| Japan | 81-3-5408-4100 |
| EMEA | 44-20-7772-5454 |

D-R-A-F-T
2023 Annual Town Meeting and Town Election Calendar

Town Election Schedule

| | |
|----------------------------|--|
| Tuesday, September 6, 2022 | State Primary & Special Town Election |
| Tuesday, November 8, 2022 | State Election |
| Monday, January 30, 2023 | Town Caucus |
| Wednesday, March 8, 2023 | Voter Registration Deadline for Annual Town Election |
| Tuesday, March 28, 2023 | Annual Town Election |

Annual Town Meeting Schedule

| | |
|---|---|
| [date] | Joint SB/SC Capital Planning Forum |
| [date] | Finance Committee Public Forum on Capital Planning |
| [date] | Joint SB/SC Capital Planning Forum |
| Saturday, December 3, 2022, 9AM | Town Meeting Preview Meeting; Warrant Opens |
| Friday, December 16, 2022 | Due Date for Draft Warrant Articles (send to TMSubmissions@concordma.gov) |
| Friday, January 6, 2023, 4PM | Warrant Closes |
| Monday, January 9, 2023, 7PM | Select Board Meeting: vote order of Warrant Articles |
| Thursday, January 12, 2023, 4PM | Warrant Review Meeting with Town Counsel |
| Wednesday, January 25, 2023 | Deadline to submit Warrant to the printer |
| Monday, February 13, 2023 | Warrant Mailed to Households |
| Monday, February 27, 2023, 7PM (Snow Date: Tuesday, February 28) | Public Hearing #1 (hybrid): Select Board |
| Wednesday, March 1, 2023, 7PM (Snow Date: Thursday, March 2) | Public Hearing #2 (hybrid): Finance Committee – Town & CPC |
| Tuesday, March 7, 2023, 7PM (Snow Date: Wednesday, March 8) | Public Hearing #3 (hybrid): Finance Committee -- Schools |
| Thursday, March 9, 2023, 7PM (Snow Date: Tuesday, March 14) | Public Hearing #4 (hybrid): Planning Board |
| Wednesday, March 15, 2023, 7PM (Snow Date: Thursday, March 16) | Public Hearing #5 (hybrid): Finance Committee – Enterprise Fund |

D-R-A-F-T

2023 Annual Town Meeting and Town Election Calendar

| | |
|--|--|
| Monday, March 27, 2023 | Select Board Meeting: SB input on draft Consent Calendar to Moderator |
| Tuesday, April 4, 2023 | Deadline for SB and FinCom Recommendations on Articles |
| Wednesday, April 5, 2023 | Deadline to submit Finance Committee report to Printer |
| Monday, April 10, 2023 | Voter Registration Deadline for Annual Town Meeting |
| Friday, April 7, 2023, 5PM | Deadline for Draft Motions (submit to TMSubmissions@concordma.gov) |
| Thursday, April 13, 2023, 4PM | Motions Review Meeting with Town Counsel |
| Friday, April 14, 2023 | FinCom Report mailed to households |
| Friday, April 14, 2023, 9AM | Moderator's Town Meeting Coordination Meeting (All Article Sponsors and Town Meeting Coordinator) |
| Thursday, April 20, 5PM | Deadline to submit PowerPoint Presentations and Paper Handouts for review and approval (submit to TMSubmissions@concordma.gov) |
| Monday, April 24, 2023 | Moderator's Staff Meeting (location and time TBD) |
| Sunday, April 30, 2023, at 1PM | Annual Town Meeting at Concord Carlisle High School |
| Monday, May 1 to Wednesday, May 3, 2023 at 7PM | Subsequent Additional Days as needed to conclude Annual Town Meeting |

Relevant Holidays

| | |
|---------------------------|--|
| December 18-26, 2022 | Hanukkah |
| Sunday, December 25, 2022 | Christmas Day |
| Sunday, January 1, 2023 | New Year's Day |
| Monday, January 16, 2023 | Martin Luther King, Jr. Day |
| Monday, February 20, 2023 | President's Day |
| February 20-24, 2023 | Concord Public Schools February Vacation |
| March 22- April 21, 2023 | Ramadan |
| April 5-13, 2023 | Passover |
| Sunday April 9, 2023 | Easter |
| Monday, April 17, 2023 | Patriot's Day (observed) |
| April 17-20, 2023 | Concord Public Schools April Vacation |



OFFICE OF THE TOWN CLERK
TOWN HOUSE,
CONCORD, MASSACHUSETTS 01742

ANNUAL TOWN MEETING

April 3, 4 and 10, 1989

ARTICLE 25. Upon motion duly made and seconded, it was

VOTED : That the Town, acting under the provisions of Article II of the Amendments to the Constitution of the Commonwealth of Massachusetts, commonly called the Home Rule Amendment, adopt the following by-law establishing a Sewer Improvement Fund in the Town of Concord.

1. Section 1. The Town of Concord hereby establishes in the Town treasury a separate revolving fund (the "Fund") for the purposes herein specified. The Fund shall be kept separate from any other monies or funds of the Town, and shall be expended only for those purposes herein specified.
2. Section 2. The Public Works Commissioners, acting as Sewer Commissioners, shall assess a sewer improvement fee for all connections to the Town sewer system which will generate a sewage flow rate in excess of the flow rate contemplated for the relevant property in the Facilities Planning Study prepared by Camp, Dresser and McKee, dated May, 1984 or any amendments thereto approved by a Town Meeting or any subsequent study approved by appropriate authorities. The sewer improvement fee assessed shall equal the estimated cost of constructing, reconstructing, and expanding sewer lines, treatment plants, and other related facilities or reducing infiltration or inflow to handle an incremental amount of sewage equal to such excess flow.
3. Section 3. There shall be a schedule of costs of constructing such sewer facilities as are described in Section 2 hereof, expressed in dollars per gallon of daily flow rate, established by the Commissioners which schedule will not be established until the proposed schedule is first published in a newspaper in general circulation in the Town and considered at a public hearing held for such purpose.
4. Section 4. All sewer improvement fees collected shall be deposited into the Fund. Monies deposited into the Fund shall be used only for the purposes set forth in Section 2 hereof, as may be determined by the Commissioners. The Commissioners are expressly allowed to accept grants or gifts for deposit into the Fund.
5. Section 5. The Sewer improvement fees imposed hereunder shall be in addition to any other fees permitted by law, including without limitation sewer connection fees.

A true copy. Attest:

Alice H. Lyden
Town Clerk

Voted April 3, 1989

CONCORD PUBLIC WORKS



DATE: 8/9/2013

MEMORANDUM

To: Public Works Commission

Via: Richard Reine, Director CPW

From: Alan H. Cathcart, Water/Sewer Division Superintendent

Subject: Sewer Improvement Fee
Rate Hearing Background Information

Background

Creation of the Sewer Improvement Fee

In 1988 the Public Works Commission formulated a policy to deal with Sewer Connections and changes in sewer use, outside the scope of a Comprehensive Sewer Facilities Plan (CDM, 1984). The Commission developed a financial approach to sewer connection and use policy whereby new connections and uses outside the plan can be accepted, but must provide financial resources to “create” capacity in the sewer system to allow for additional flow. This avoided the need to judge the merits of every specific use compared with other potential, competing uses in order to allocate the limited capacity available to the Town.

This policy (attached) was authorized by Town Meeting in 1989, in Article 25, creating a Sewer Improvement Fee and was subsequently implemented with an amendment to the Sewer Rules and Regulations (dated December 13, 1989). The regulation stated that this fee would be calculated using Title 5 flows for the building and use. In their discussion the Commission stated that this would be the fairest and most objective way of calculating flows for all types of sewer customers.

The Commission envisioned that any accommodation for increases in flow, attributed to new connections or changes in use, would be offset by the removal of inflow and infiltration, or expansion of the plant with an increase in permitted discharge flows.

Master Planning: Wastewater and Community Development

During the next decade and a half, capacity has effectively been created in the sewer system through removal of inflow and infiltration into the system to an extent beyond what had been accepted in the 1980's, using funds from the sewer improvement fee. This allowed additional sewer connections, and increased sewer use from current customers.



CONCORD PUBLIC WORKS



DATE: 8/9/2013

MEMORANDUM

In 2003, the 1980's facilities plan was updated by the Wastewater Management Plan which was adopted and approved by Town Meeting in 2004, along with a plan to extend sewers into two new neighborhoods. Based on capacity constraints identified at the wastewater treatment plant, the Wastewater Planning Committee (which included representation from both DPLM and Planning Board) determined that the allocation of available capacity would be limited to "existing" developments.

In 2004 the Town's Planned Production Housing Plan was finalized which was subsequently supplemented by the Comprehensive Long Range Master Plan (2005), and Village Centers Study (2007). In these reports, it became apparent that the Town's planning interest was to encourage increased development within more densely populated centers, which are served by town sewer. To integrate previously established wastewater planning efforts, "The Status of the Municipal Wastewater Treatment in Concord, Massachusetts" (2007) was completed, highlighting the gap between wastewater service opportunities and planning interest.

At the 2009 annual Town Meeting, Article 41 was adopted directing the Town Manager to develop wastewater treatment and capacity management alternatives to accommodate wastewater flows above and beyond those flows necessary to meet existing requirements resulting from development and re-development under current zoning in a range between 320,000 to 600,000 gallons per day, which represents projected wastewater flows associated with objectives referenced in the Comprehensive Long Range Plan and Planned Production Housing Plan and quantified in the Wastewater Planning Task Force Report dated December 2008.

Groundwater Discharge Permit

After years of efforts, and with direct guidance offered by the Wastewater Planning Task Force, a comprehensive wastewater capacity alternatives analyses has completed. This effort led to the identification of the most favorable alternative which involves the expansion of our existing wastewater treatment plant along with the addition of a new groundwater discharge site at this same location.

Following a detailed hydrogeologic assessment, MassDEP has favorably received the scientific merits of this alternative, as detailed in their "*Approval of Hydrogeologic Evaluation Report*" (see attached). Most importantly, this approval states that the site could receive up to 155,000 gallons per day of new wastewater capacity – should the town decide to move forward with full permitting efforts required to acquire an actual groundwater discharge permit. As this alternative remains the most viable option presently available to the Town to expand its wastewater treatment capacity, Staff have



CONCORD PUBLIC WORKS



DATE: 8/9/2013

MEMORANDUM

determined that it would be prudent for the PWC to re-visit the cost assumptions behind the existing Sewer Improvement Fee and determine if it is appropriate to revise this fee accordingly. Furthermore, to support the continuation of the "capacity allowance model" established by the Public Works Commission during their March 2008 meeting. This policy requires specific criteria as outlined in the sewer regulations and PWC minutes to be met for projects requiring increased wastewater flows accepted by the town. The required "relief valve" will now be provided by the Town rather than the applicant through the creation of this potential 155,000 gallons of capacity.

Proposal to Update the Sewer Improvement Fee

In his letter to Alan Cathcart from Kent Nichols of Weston and Sampson dated August 8, 2013 Mr. Nichols reviews the history of the calculation of the fee, and notes that "the current situation differs from prior SIF calculations in that the system capacity is nearing the maximum 1,200,000 gpd design flow, and the addition of capacity or creation of new capacity is required to allow continued connections to the system...The calculation of a current SIF that recognizes Concord's need to implement changes to its system (such as the Ground Water Discharge...) may be based on a combination of the historic calculation method (total system value) and these new capacity increase costs."

The letter goes on to describe those calculations in detail. The cost of existing assets and the cost of capacity related equipment upgrades at the wastewater treatment plant distributed over all flow capacity is \$18.90 per gallon per day. The cost of the new groundwater discharge system, the nitrogen removal system for groundwater flows, and related permitting and engineering costs distributed over the new capacity created in the sewer system is \$21.17 per gallon per day. The total costs for new capacity is \$18.90 per gpd plus \$21.17 per gpd, which equals a total of \$40.07 per gallon per day.

The working assumptions required to support the proposed sewer improvement fee has been reviewed by Town Counsel and they have concluded that the proposed increase in the Sewer Improvement Fee is defensible.

Recommendation

I recommend that the Public Works Commission set the Sewer Improvement Fee at \$40.07 per gallon per day of flow, in accordance with the calculation presented in the letter to Alan Cathcart from Kent Nichols of Weston and Sampson dated August 8, 2013 .



DATE: February 7, 2020

MEMORANDUM

TO: Public Works Commission

FROM: Alan H. Cathcart, Acting Director

PREPARED BY: Valerie Doerrer, Public Works Engineer - Water Systems

RE: Wastewater Capacity Update

Background:

Approximately 35% of developed parcels in Concord are connected to the Town's centralized sewer collection system. The wastewater treatment facility (WWTF) is limited to treating and discharging a maximum of 1.2 million gallons per day (mgd) of wastewater per the National Pollution Discharge Elimination System (NPDES) permit issued by the EPA and MASSDEP. Currently, the WWTF is treating an average of 1.05 mgd.

The NPDES permit is a restriction on the Town's centralized sewer system capacity. As such, any changes to Town planning policies must be coordinated in order to avoid NPDES permit violations due to flow exceedances.

For several decades, the Town of Concord has proactively planned for wastewater management through a strong focus on sound environmental planning. The main tenets of this planning strategy involve continuing to provide centralized sewer service to the properties in Town that have a need while maintaining quality wastewater treatment for sustained environmental protection.

The Town's Comprehensive Wastewater Management Plan (CWMP) and Single Environmental Impact Report (EOEA #13088) was completed in February 2004. This town-wide plan was completed over a five-year period, and resulted in a "recommended plan" that identified several areas that were deemed suitable for potential extension of the centralized sewer system, as well as several areas that would be better suited for the construction of decentralized wastewater systems. At the time of the CWMP development, estimated flow contributions from these potential centralized sewer system extensions, future flows from existing sewer system infill/ redevelopment activities, and continued extraneous flow management could all be served within the permitted discharge capacity of the existing WWTF. Four separate implementation phases of the recommended plan were envisioned in the CWMP, dependent upon favorable financial models that were conditioned upon reasonable construction costs based on industry trends or the provision of favorable state or federal grant opportunities. Only one phase of sewer extensions has been constructed to date.

Another tenet of the CWMP was a desire for growth neutrality; this tenet was focused on providing off-site wastewater management for existing developed parcels where on-site wastewater solutions would offer a lesser degree of environmental protection. Not long after the CWMP effort was completed, Concord's Department of Planning and Land Management (DPLM) completed a Planned

Production Housing Plan (PPHP) and a Comprehensive Long Range Plan (CLRP) to guide the Town in development and redevelopment activities through the year 2020. The change in development interest, realized almost immediately by redevelopment projects that were actualized within areas served by municipal sewer, depleted a significant amount of the capacity “infill” allowance that was included in the CWMP. These activities, in addition to the changing housing goals projected in the PPHP/CLRP, led the Town to reexamine actualized wastewater flows and integrate the aforementioned planning models to update future flow projections.

In an effort to accommodate both increasing development and increasingly stringent treatment standards anticipated in a pending NPDES permit (reflected in the 2006 permit), Concord invested in a major WWTF rehabilitation and upgrade project. This project involved the addition of tertiary treatment (CoMag) for advanced phosphorus removal while incorporating other process and support system improvements. Where possible, unit processes were upgraded to provide for the potential to treat higher future flows. Following this work, a third-party process and design engineer performed a technical assessment to update the theoretical “rated” capacity of the WWTF. Their findings indicated that the WWTF could treat up to 1.36 mgd of flow without having to perform any upgrades to the facility, noting a modest increase in operating costs would be required to meet existing NPDES permit conditions for nutrient loading.

In December 2007, “The Status of Municipal Wastewater Treatment in Concord, Massachusetts” was completed to capture flows that had been realized since the creation of the CWMP (including those from the Phase 1 sewer extensions) and characterize how remaining capacity, if any, related to current planning and zoning interests. At the time (October 2007), the calculated average daily flow was 1.097 mgd. Initial redevelopment projections and estimation of impacts in the existing sewered areas based on information in the PPHP/CLRP were also included in this planning work. The results of this study revealed that there would be insufficient permitted discharge capacity at the WWTF to meet the future flow projections, including extension phases, which were identified within the CWMP. Because of the serious nature of these findings, a Wastewater Planning Task Force (WWPTF) was formed and embarked on an Integrated Planning Initiative to better define and quantify additional wastewater capacity that would be needed to support long-range town initiatives, including planned housing programs.

Upon the conclusion of the Integrated Planning Initiative, it was found that if planning interests identified at the time were realized, future wastewater flows could range from 1.097 mgd (in 2007) up to 1.417 mgd or even 1.695 mgd over the 20-year planning period. Such flows could not be accommodated within the current facility without major investments or significant modifications made to the permitted discharge capacity at the WWTF. As a final task for the WWPTF, various wastewater management alternatives required to accommodate the potential future flow were identified. The most feasible alternative identified was an increase to the flow limits of the NPDES discharge permit at the existing WWTF. To this end, the Town has submitted a formal request to EPA and MassDEP for an increase in the discharge flow limit for the WWTF from 1.2 mgd to 1.34 mgd. This request was incorporated into a NPDES permit renewal application submitted in June of 2018. To date, the Town has not been issued a new permit and will continue to operate the facility in compliance with the existing permit until such time as a new permit has been issued.



As of February 2020, the Town has not exceeded the NPDES permitted flow of 1.2 mgd. We continue to accommodate requests for increased sewer flow in accordance with the original CWMP framework, which has been supported by a combination of infiltration and inflow removal and strict adherence to Sewer Use Rules and Regulations. While the PWC continues to understand that acceptance of new sewer flows to the WWTF is done with some level of risk, this risk is less well recognized or appreciated by existing customers who wish to increase their demand on our system or new developments that wish to be connected to our system. Ultimately, should wastewater flow exceed our NPDES permit limit of 1.2 mgd, the Town can expect to be issued a non-compliance Administrative Consent Order from the EPA. At that time, EPA would exert their will as to how they see the Town could manage its' sewer collection system and what, if any, new connections could be made to the system. Essentially, this would create a moratorium on any new sewer connections that would increase flow at the WWTF until the Consent Order is met.

Concord, like many other communities across the country, desires to increase residential dwelling density and diversity; this is evidenced by the existing Zoning Bylaws (Section 4.2.2), as well as by the proposed changes to the Zoning Bylaws that have been presented as warrant articles for the 2020 Town Meeting. Further, the Town is holding public forums to review the Thoreau Depot Business District and develop a vision for the future of the District. This future vision includes attracting new businesses such as restaurants, retail and multi-unit residential developments to encourage mixed-use redevelopment in areas with ready access to public services, including regional transit. Any such zoning change could affect the Division's ability to maintain available sewer capacity that was earmarked in the CWMP for future sewer system expansions and infill.

Discussion:

The Division continues to take on a significant wastewater permit compliance risk while accommodating requests for additional sewer flows and maintaining sewer capacity earmarked for development parcels and future sewer system expansions. The Division keeps this risk calculated through the evolution of policies, such as the one connection per parcel policy, a policy which was devised to protect against unplanned wastewater demands that could arise as a result of significant subdivisions. Additional measures include limiting the administrative approval for new or increased flow of 1,000 gpd for any single parcel, developing plans for capacity "relief valves" (i.e. having property owners identify potential groundwater discharge sites), requiring specific design configurations of water and sewer services depending on the development being proposed on a parcel, and supporting increased investments in ongoing infiltration and inflow efforts.

The Division has seen an increase in requests for additional flows under Zoning Bylaw 4.2.2., which allows for a two family or additional detached dwelling unit by Special Permit if the building on the parcel existed prior to the creation of the Zoning Bylaw. The Division is already accommodating the creation of an additional dwelling unit contained within an existing single family dwelling (creating a two family dwelling) without requiring any changes to the water and sewer service connections. When an additional dwelling is proposed in an existing detached accessory structure, the dwelling unit is required to have both a separate water and sewer service connection, independent of the primary dwelling unit, in accordance with the Division's design criteria (see May 4, 2018 memo to PWC). In both instances, a Form S Sewer Review is required to determine any increases in sewer flows, and a Sewer Improvement Fee (SIF) is assessed based on the resulting flow increase. The proposed bylaw change is intended to allow an additional dwelling unit on a single parcel within an existing single family dwelling (creating a two family dwelling), or a detached structure, up to 750 SF by right. A Special Permit would be required if the proposed additional dwelling is between 750 SF to 1,000 SF. A significant difference in the proposed bylaw is that the structure can be new



construction; it does not have to be an existing structure that was there prior to the creation of the Zoning Bylaw.

Another proposed bylaw change under Zoning Bylaw 4.2.2, is to allow the construction of a new, two family dwelling or alteration of an existing single family dwelling into a two family dwelling in Residence "C" District by Special Permit. Under current Zoning, two family dwelling units are allowed by Special Permit in an existing single family structure if the building on the parcel existed prior to the creation of the Zoning Bylaws as noted above. The Division will continue to accommodate two family dwellings by allowing one water service connection and one sewer service connection to the two family structure. A Form S Sewer Review will be required to determine any increases in sewer flows, and a SIF will be assessed based on the resulting flow increases.

The above changes will result in flow increases from existing sewer, or sewer eligible, parcels in Town, but at no time should the increase be more than 1,000 gpd. While this increase in flow was not considered in the CWMP, the flows are currently being managed using existing policies and design standards.

Medium to large scale private developments are another source of increased sewer flows that adds to the Town's risk when additional flows are requested. Increasingly, stakeholders and development teams who are aware of the limited sewer system capacity approach the Division seeking a commitment of sewer flow to support the development of their projects while the project is still in the conceptual planning stages. This is done to determine cost benefit of the project and the project's feasibility. These proposals include a variety of uses, including affordable housing, residential infill, live/work spaces, proposed planned developments, expansions for existing commercial properties, expansions for existing hotels, expansions for existing assisted living facilities, and expansion of Emerson Hospital. As a practice, increases in sewer flow (typically >1,000 gpd) for medium to large scale private developments have been reviewed based on a case-by-case basis and only given formal consideration by the PWC when the development has garnered sufficient support/approval from other Town Boards and Commissions, and must include commitments to water demand management measures. With the exception of small-scale affordable housing projects, the PWC has not committed sewer flows to private development concepts that may not actually be realized at the will of the developer or cannot be realized due to a regulatory mandate imposed upon the Town through a consent order.

Conclusion:

The Town's sewer capacity is finite. As detailed above, when this finite limit will be reached is based on a number of variables that are not within the Division's control. What is known is that the Town will continue to assume some risk if the NPDES permit flow limit is exceeded which will eventually happen as long as it continues to accommodate long-range planning goals and interests. When this flow limit is exceeded, the Town will no longer have sole control of its wastewater capacity management plan. This will mean the Town will not be able to unilaterally approve requests for flow increases. Until such time, the Town should continue to explore alternative capacity expansion opportunities including; pursuit of flow limit increases through the NDPES permit renewal process, expand our treatment capacity by investing in a groundwater discharge alternative (at the existing site or elsewhere), or explore opportunities to develop a comprehensive water systems management approach that could address flow and contaminant "load" needs for the entire community in a holistic, integrated manner (i.e. an integrated water resource management plan). Several of these options will require considerable investment of time and funds. They all will require regulatory



review and approval. The approach and degree of regulatory review may dictate a need for the Town to revisit our state certified CWMP.

Attachments: The Status of Municipal Wastewater Treatment in Concord, Mass – Dec. 2007
Wastewater Planning Task Force – Summary Report – Feb. 2009



REGIONAL HOUSING SERVICES OFFICE

Concord Update: June 6, 2022



*Regional Agreement between Acton, Bedford, Concord, Lexington,
Lincoln, Maynard, Sudbury, Wayland and Weston*

RHSO Update – Service Model

REGIONAL HOUSING SERVICES OFFICE, *ESTABLISHED 2011*



Member Towns receive housing services for an annual fee per Inter- Municipal Agreement:

- 3 Year IMA Term, specifies Contracted Hours/Fee
- Includes, Advisory Committee Shared Cost for Website, Regional Efforts and Administrative Support
- Services includes Inventory Management, Monitoring, Program Development and Administration, Assessment Valuations and Local Support



RHSO Personnel deliver services through Lead Community.

| | 2010 Housing Units | SHI Units | SHI% |
|-----------|--------------------|-----------|--------|
| Acton | 8,475 | 735 | 8.67% |
| Bedford | 5,322 | 987 | 18.55% |
| Concord | 6,852 | 713 | 10.41% |
| Lexington | 11,946 | 1320 | 11.05% |
| Lincoln | 2,130 | 298 | 13.99% |
| Maynard | 4,430 | 424 | 9.57% |
| Sudbury | 5,921 | 775 | 13.09% |
| Wayland | 4,957 | 477 | 9.62% |
| Weston | 3,952 | 151 | 3.82% |
| | 53,985 | 5,880 | 10.89% |

Membership Fee covers :

- Staffing and Contracting
- Administrative expenses
- Accounting
- Office support
- Technology
- Other

Zero in on SHI

| Current SHI (2010 Denominator) | | | | | | | Estimated 2020 SHI (2020 Denominator) | | | | | |
|--------------------------------|--------------------|-----------|--------|--------------------------|--------------------|--------------------|---------------------------------------|---------------|---------------------------|--------|---------|--|
| | 2010 Housing Units | SHI Units | SHI% | Market Rate units on SHI | "Affordable" SHI % | Safe Harbor | 2020 Housing Units | 2010 Seasonal | 2020 Estimate Denominator | SHI % | +/- 10% | Notes |
| Acton | 8,475 | 735 | 8.67% | 300 | 5.13% | | 9219 | 55 | 9164 | 8.02% | -174 | Awaiting Powder Mill (230), Pipeline (9) |
| Bedford | 5,322 | 987 | 18.55% | 400 | 11.03% | >10% | 5444 | 46 | 5398 | 18.28% | 442 | |
| Concord | 6,852 | 713 | 10.41% | 294 | 6.12% | >10% | 7295 | 95 | 7200 | 9.90% | -7 | Awaiting Junction Village (83), Pipeline (3) |
| Lexington | 11,946 | 1320 | 11.05% | 571 | 6.27% | >10% | 12310 | 73 | 12237 | 10.79% | 112 | Pipeline (34) |
| Lincoln | 2,130 | 298 | 13.99% | 120 | 8.36% | >10% | 2771 | 26 | 2745 | 10.86% | 24 | |
| Maynard | 4,430 | 424 | 9.57% | 18 | 9.16% | | 4741 | 17 | 4724 | 8.98% | -54 | Awaiting Maynard Square (28) HPP Certification |
| Sudbury | 5,921 | 775 | 13.09% | 297 | 8.07% | >10% | 6556 | 30 | 6526 | 11.88% | 123 | |
| Wayland | 4,957 | 477 | 9.62% | 202 | 5.55% | HPP Certified 5/23 | 5296 | 64 | 5232 | 9.12% | 26 | Pipeline (1) |
| Weston | 3,952 | 151 | 3.82% | 0 | 3.82% | | 4043 | 56 | 3987 | 3.79% | -68 | Awaiting 104 BPR (180), Pipeline (1) |
| | 53,985 | 5,880 | 10.89% | 2,202 | 6.81% | | 57,675 | 462 | 57,213 | 10.28% | | |

RHSO Workplan – FY22 Recap

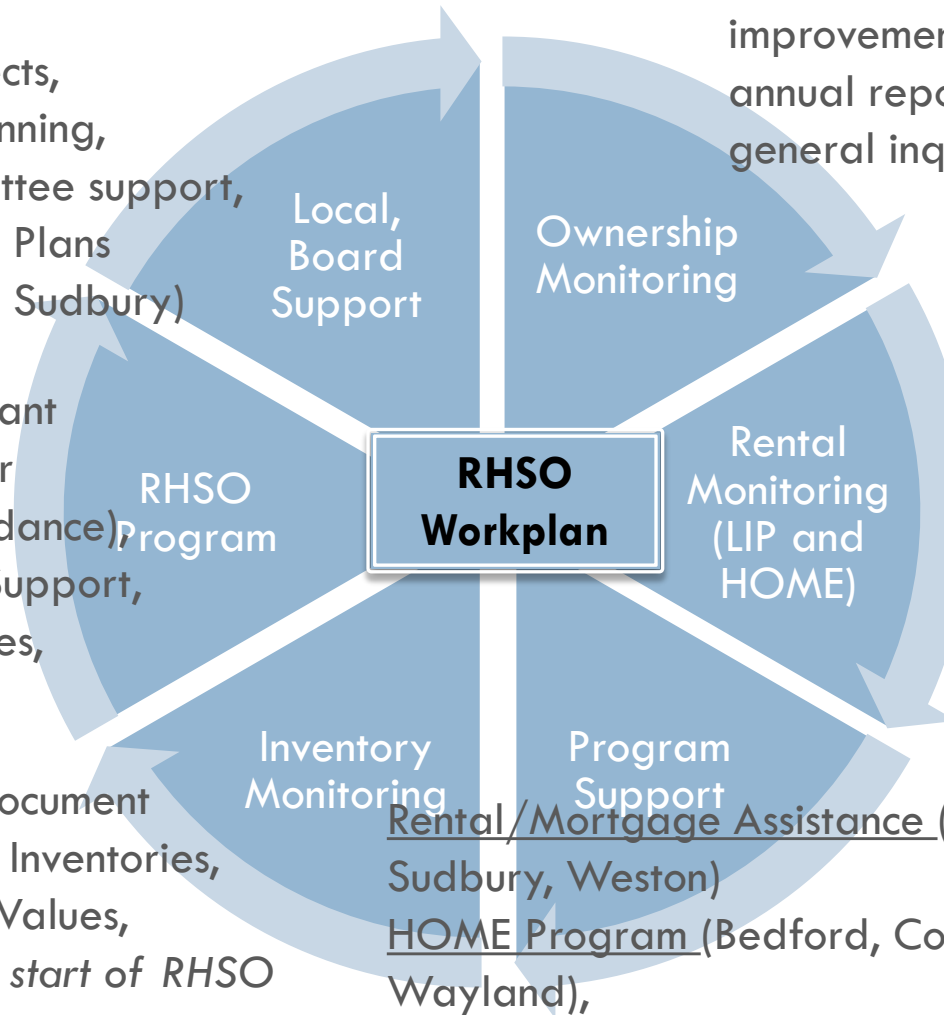
481 Units: Annual certifications (92%), refinancing, capital improvements, residential annual reporting, general inquiries

| | FY20 | FY21 | FY22 | FY23 (IP) |
|-------------|----------|----------|----------|-----------|
| Acton | 1 | 1 | | 1 |
| Bedford | | 2 | | |
| Concord | 2 | 3 | 2 | |
| Lexington | 1 | | 1 | |
| Lincoln | 1 | 3 | 3 | 3 |
| Maynard | | | | |
| Sudbury/SHT | 1 | 2 | 3 | |
| Wayland* | | 1 | 2 | |
| Weston | 1 | 1 | | |
| | 7 | 13 | 11 | |
| | \$29,222 | \$64,682 | \$31,231 | |

Development projects, Feasibility and Planning, Boards and Committee support, Housing Production Plans (Concord now, then Sudbury)

Homeowner and Tenant Inquiries, Homeowner Training (16% attendance), Property Manager Support, Fair Housing Initiatives, RHSO Website

SHI Management, Document Repository, Tracking Inventories, Provide Assessment Values, 1094 SHI units since start of RHSO



844 Restricted Units Across 33 Properties: Rent Approvals, Site Visits, Tenant Recertification, Rent Examination, Marketing Review

Rental/Mortgage Assistance (Acton, Bedford, Maynard, Sudbury, Weston)

HOME Program (Bedford, Concord, Lexington, Sudbury, Wayland),

Small Grant Program (Acton, Bedford, Concord, Sudbury)

RHSO FY23 Budget

Budget is mostly staffing – correlating to hours - with some program and administration

| | FY22 - Budget, 5.1.22 | | | | | | | FY23 - Budget Proposal | | | | | FY23 vs FY22 | |
|-----------------------|-----------------------|-------|-------------|-----|-----------|-------|------------|------------------------|-------|-----------|-------|------------|--------------|-------|
| | Current | | Adjustments | | Total | | % of Total | IMA | | Total | | % of Total | \$ | Hours |
| Starting Balance | \$4,003 | | | | \$4,003 | | | \$4,008 | | \$4,008 | | | | |
| Revenue | | | | | | | | | | | | | | |
| Acton | \$33,976 | 426 | \$4,000 | 50 | \$37,976 | 476 | 11% | \$34,980 | 442 | \$34,980 | 442 | 11% | \$2,996 | 34 |
| Bedford | \$32,939 | 413 | | | \$32,939 | 413 | 10% | \$33,952 | 429 | \$33,952 | 429 | 10% | (\$1,013) | (16) |
| Concord | \$52,638 | 660 | \$10,000 | 126 | \$62,638 | 786 | 19% | \$60,938 | 770 | \$60,938 | 770 | 19% | \$1,700 | 16 |
| Lexington | \$31,902 | 400 | | | \$31,902 | 400 | 9% | \$32,923 | 416 | \$32,923 | 416 | 10% | (\$1,021) | (16) |
| Lincoln | \$20,976 | 263 | \$8,800 | 110 | \$29,776 | 373 | 9% | \$24,930 | 315 | \$24,930 | 315 | 8% | \$4,846 | 58 |
| Maynard | \$11,964 | 150 | | | \$11,964 | 150 | 4% | \$11,951 | 151 | \$11,951 | 151 | 4% | \$13 | (1) |
| Sudbury | \$74,889 | 939 | | | \$74,889 | 939 | 22% | \$74,946 | 947 | \$74,946 | 947 | 23% | (\$57) | (8) |
| Wayland | \$12,362 | 155 | | | \$12,362 | 155 | 4% | \$11,951 | 151 | \$11,951 | 151 | 4% | \$411 | 4 |
| Weston | \$42,110 | 528 | | | \$42,110 | 528 | 13% | \$38,937 | 492 | \$38,937 | 492 | 12% | \$3,173 | 36 |
| Total | \$313,756 | 3,934 | \$22,800 | 286 | \$336,556 | 4,220 | 100% | \$325,508 | 4,113 | \$325,508 | 4,113 | 100% | \$11,048 | 107 |
| Expenses | | | | | | | | | | | | | | |
| Staffing | \$287,751 | | \$22,800 | | \$310,551 | | | \$299,503 | | | | | | |
| Program expenses | \$5,000 | | | | \$5,000 | | | \$5,000 | | | | | | |
| Administrative Cost | \$21,000 | | | | \$21,000 | | | \$21,000 | | | | | | |
| Total Expenses | \$313,751 | | | | \$336,551 | | | \$325,503 | | | | | | |
| Ending Balance | \$4,008 | | | | \$4,008 | | | \$4,014 | | | | | | |
| Billing Rate | \$79.75 | | | | \$79.75 | | | \$79.14 | | | | | | |

RHSO Update – Summary

- RHSO successfully completing 11 years of operation
Thank you for your continued support!
- ▣ Comments and suggestions always welcome



Proactive Compliance Monitoring

- Preserve, Create Units
- Maintain Housing Inventory

Resource Efficiency

- Centralize Information for existing and prospective residents
- Leverage Resources, Resource Continuity

Regional Approach

- Common Solutions for Common Challenges
- Enhance Municipal Services



Regional Housing Services Office

Serving Concord, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland, and
Woburn

Office Address: 37 Knox Trail, Concord, MA 01720
Phone: (978) 287-1092

Website: WWW.RHSOhousing.org
Email: INFO@RHSOhousing.org

June 1, 2022

To: Kerry LaFleur
From: Liz Rust, RHSO Director
RE: RHSO FY23 IMA Amendment

Dear Kerry,

Attached please find the RHSO FY23 IMA Amendment for Concord's consideration and signature.

The IMA is a three-year term, and each year of that term, we update the budget (and any other provisions) through an amendment, to proactively continue membership from the board. For FY23 we have updated the budget and there are no other provisions proposed. FY23 is the last year of the current three-year term, and next year a full IMA will be presented.

Concord was a founding member of the RHSO since its inception in 2011, for 11 years, and is the lead community (since 2015). Concord has received and has received an average of 634 hours of support annually, and for FY23, Concord will receive 770 hours for \$60,940, consistent with past practice. Concord funds the RHSO through CPA, department budget, and the CHDC contributes as well.

The RHSO continues to provide services to Concord in accordance with our agreement, including rental and ownership monitoring, inventory management, program administration for the town and ACHC programs, local support for both the town and its affordable housing groups, and regional efforts including trainings and support for our informational website.

The RHSO greatly appreciates having Concord as a member and lead community, and we are so pleased to have the opportunity to continue providing support for your affordable housing needs,

Sincerely,

Elizabeth Rust

AMENDMENT

The agreement entered into by and between the Towns of Acton, Bedford, Concord, Lexington, Lincoln, Maynard, Sudbury, Wayland and Weston (collectively the “Municipalities”), dated October 1, 2020, effective October 1, 2020 (the “Agreement”) to share services of a Regional Housing Services Office provided by the Town of Concord (the “Agreement”), which is incorporated herein by reference, is hereby amended, effective July 1, 2022, as described below.

WHEREAS, the Town of Concord agrees to provide the services described in the Agreement, and NOW,

- Exhibit B. Fee Structure. This Exhibit is deleted and replaced in its entirety with the Membership Fee Schedule Chart for FY23, attached hereto as Exhibit B.

- [SIGNATURE PAGES FOLLOW EXHIBIT B]

Exhibit B

Membership Fee Schedule Chart for FY23

The participating municipalities will proportionally share the total cost of operating the Regional Housing Services Office. The proportional share is determined based on the percentage of hours planned to support each municipality for core services as represented in the fee schedule.

This fee structure does not include payment for additional supplemental services which will be proposed and invoiced outside of this agreement or payment for additional hours in excess of the allotted hours.

| FY23 Membership Fee Schedule | | | |
|------------------------------|-------|----------|-------------|
| | Hours | % of hrs | Pro rata \$ |
| Acton | 442 | 11% | \$34,980 |
| Bedford | 429 | 10% | \$33,952 |
| Concord | 770 | 19% | \$60,938 |
| Lexington | 416 | 10% | \$32,923 |
| Lincoln | 315 | 8% | \$24,930 |
| Maynard | 151 | 4% | \$11,951 |
| Sudbury | 947 | 23% | \$74,946 |
| Wayland | 151 | 4% | \$11,951 |
| Weston | 492 | 12% | \$38,937 |
| Total | 4,113 | 100% | \$325,508 |

Hereon duly authorized and executed as a sealed instrument,

TOWN OF CONCORD

By its Town Interim Manager

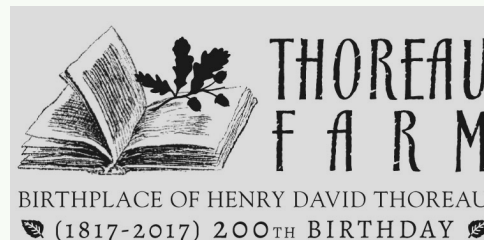
Date: _____, 2022



Two Revolutions footpath

Battle Road Trail to Thoreau Farm

6.6.22



the idea

.8 mile foot path from Battle Road Trail to the Thoreau Farm:

Home of Thoreau Farm Trust, Gaining Ground, and the Thoreau Society

Connecting the birthplace and Virginia Road neighborhood to Meriam Corner and Town center, with further connectivity north to Bedford trails

Promoting conservation & environmental sensitivity, history and education, passive recreation and mobility

Celebrating two storied histories of Concord



The “Envision” inspiration

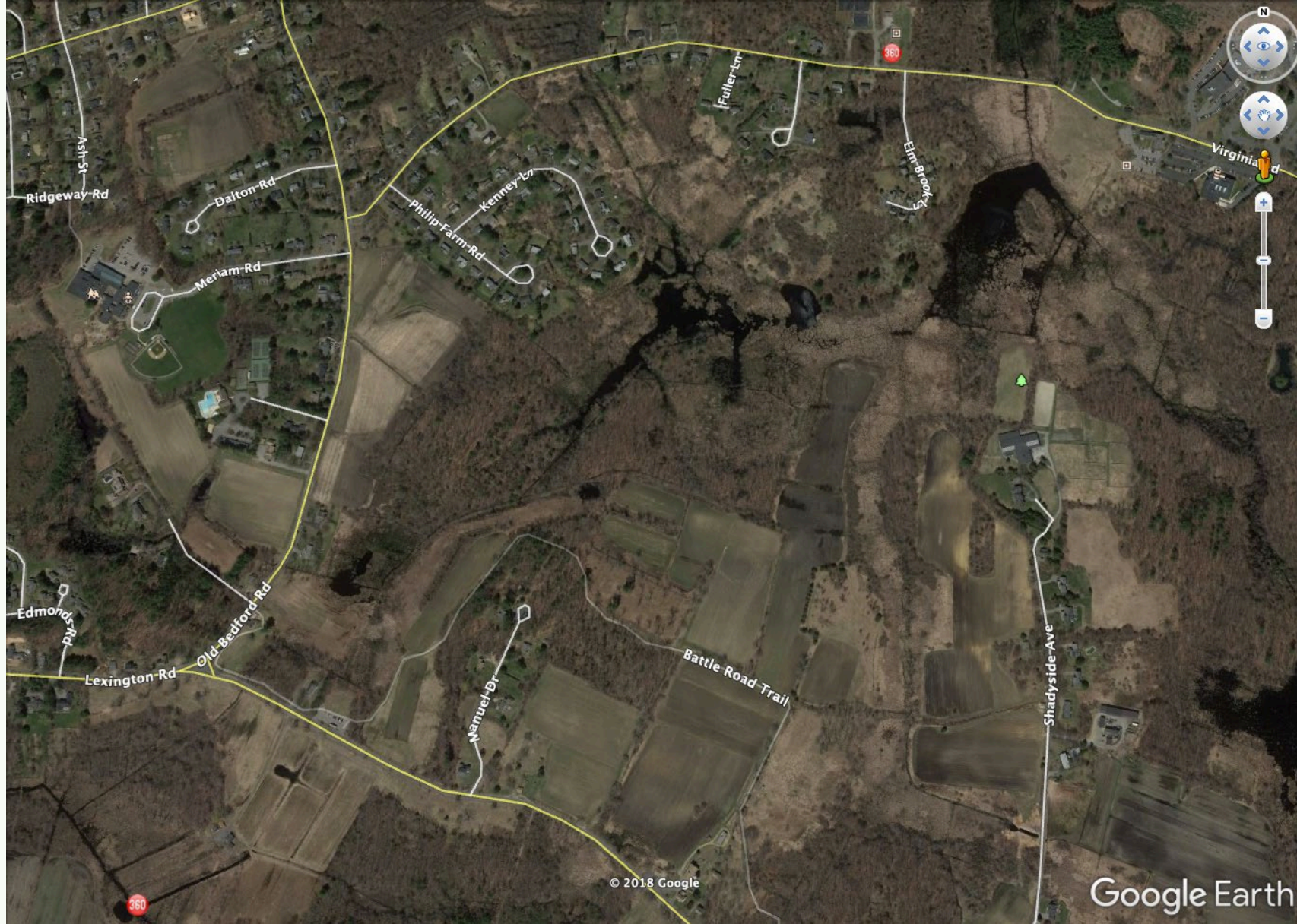
“... strong need to increase both the physical and social connectivity

... expand non-automobile options for all residents to travel in town

... address increased congestion and carbon emissions while increasing residents’ connections to the town’s cultural, recreational and commercial centers and to promote a healthy lifestyle.” (9)

“Foster better collaboration between cultural organizations, historical groups, and local businesses.” (10)

“Enhance the connections and access to bike paths and walking trails between open spaces and the village centers, .. institutions and organizations, and recreation sites.” (12)



Battle Road Trail



Proposed trail route



South from the junction with Battle Road



View northwards from Battle Road junction



Looking west from the new trail



Northern border of the marsh, looking south to Olive Stowe farmhouse



Volunteers maintain the proposed route



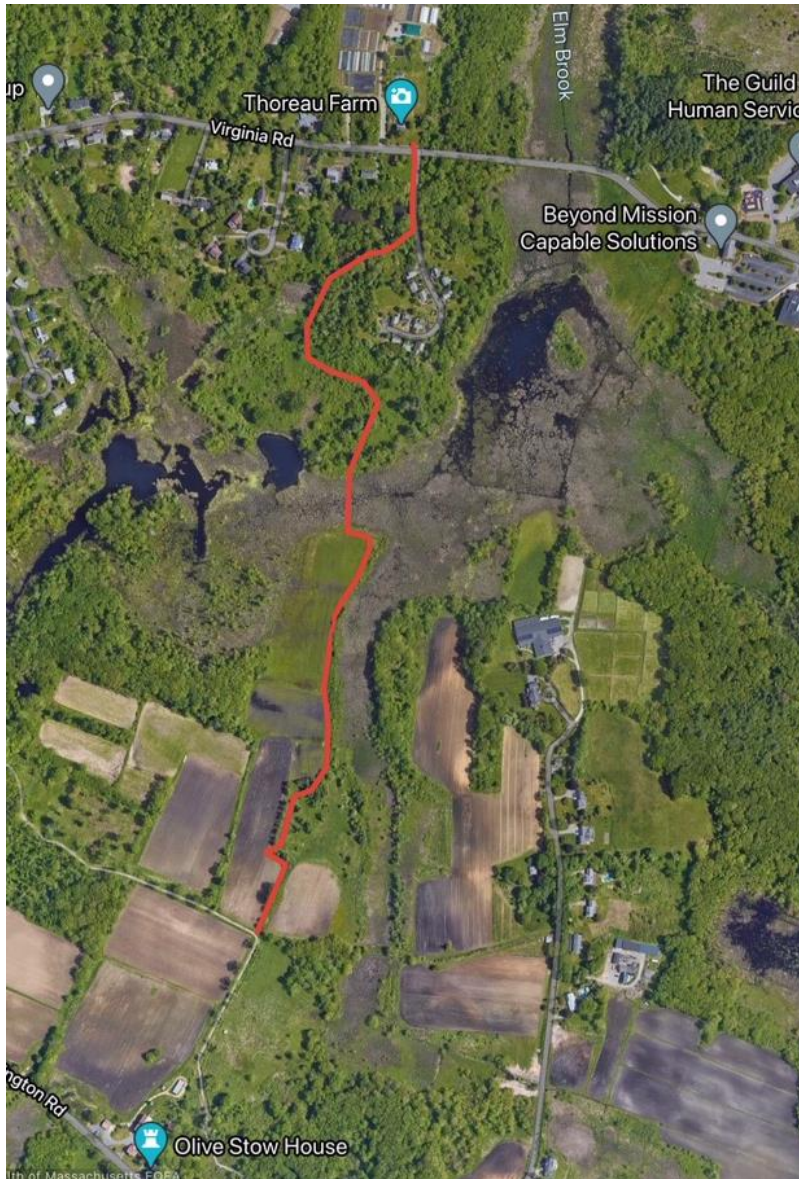
The birthplace of Henry David Thoreau

Long journey to create a trail

- 2011 Thoreau Farm Trust (TFT) envisions a connector trail
- 2012 TFT engages Mass. Audubon for study
- 2020 MMNHP Superintendent BJ Dunn endorses concept
- 2021 Mass. Audubon updates study & recommendations
- 2022 MMNHP Superintendent Simone Monteleone walks trail,
engages NPS Partnership office
- TFT-Town-MMNHP establish General Agreement
- 2023 TFT-Town-MMNHP establish Philanthropic Support Agreement
- 2024 Fundraising & Permitting
- 2025 Construction

A Pathway to Join the Thoreau Birthplace to the Battle Road Trail

Phase Two – Detailed Layout and Cost Estimates



Prepared by Bill Giezentanner
March 2021

Ecological Extension Service
Massachusetts Audubon Society
208 South Great Road
Lincoln, Massachusetts 01773

781 259 2159
781 259 2359 (fax)

Introduction

In 2012 the Mass Audubon Ecological Extension Service prepared a report at the request of the Thoreau Farm Trust to explore the concept and feasibility of a footpath to connect Thoreau Farm, the birthplace of Henry David Thoreau, owned by the Thoreau Farm Trust and located at 341 Virginia Road, with the Battle Road Trail of the Minuteman National Historical Park as it runs north of Lexington Road (see Figure 1).

The Thoreau Farm Trust, a nonprofit organization, protects the farmhouse in which Henry David Thoreau was born in 1817 and offers educational programs that address his life and writings, and his relevance to our world today. A rarity now in Concord, the restored farmhouse is surrounded by fields and woodland, and still evokes the 19th century of Thoreau's time.

The Minuteman National Historical Park protects land and locations associated with the beginning of the American Revolution, specifically those associated with the British march on Lexington and Concord on April 19, 1775. The Battle Road Trail is a 5.5-mile walking, cycling and wheelchair accessible path interpreting the events of that day and life in Concord in the 18th century.

The purpose of this footpath would be to:

- provide a connection between these two historic destinations,
- provide opportunities for visitors primarily interested in one of these destinations to learn about the other,
- accommodate a diversity of trail users (handicapped accessible to the extent practicable)
- extend a network of existing walking paths that stretch to the north and south.

The 2012 report included a summary of discussions of the concept with landowners and neighbors, investigated options for a trail route, proposed methods for constructing a trail, and estimated costs for creating the trail. The 2020 Phase One update built on the earlier work and included a more detailed evaluation of route alternatives and updated cost estimates. This Phase Two report will provide a detailed layout for the trail and realistic cost estimates for the purpose of raising funds for the project.

Because of an extensive area of wetlands associated with Elm Brook, any route for the trail to arrive at the Thoreau Farm on Virginia Road would have to cross land owned by the Elm Brook Lane Homeowners Association, the Town of Concord, and the National Park Service (Figure 1). Elm Brook Lane is a residential neighborhood of 12 houses on a ¼-mile cul-de-sac. The development was created by the Concord Housing Authority in 2002. Individual property owners own a small lot around each house, while the Elm Brook Lane Homeowners Association owns the common land around the houses. The Town of Concord holds a Conservation Restriction (CR) over the Association land which includes the right of public access. The Town of Concord also owns the parcel south of Elm Brook Lane, known as the Hebb Land. This parcel, formerly part of a farm including the Elm Brook Lane parcels, was acquired in 1999. The land is under the control of the Concord Board of Selectmen.

The 2012 planning effort included conversations with each landowner and sought input on the concept and on generally preferred trail routes across the various parcels. Jeff Collins of the Mass Audubon Ecological Extension Service walked the area paying attention to indications of soil wetness, views, and options for placing a walking trail. Historic aerial photographs, available through Google Earth, and Town of



Figure 1

-  Town of Concord
-  Minuteman National Historical Park
-  Town of Concord CR

0 250 500 1,000 Feet



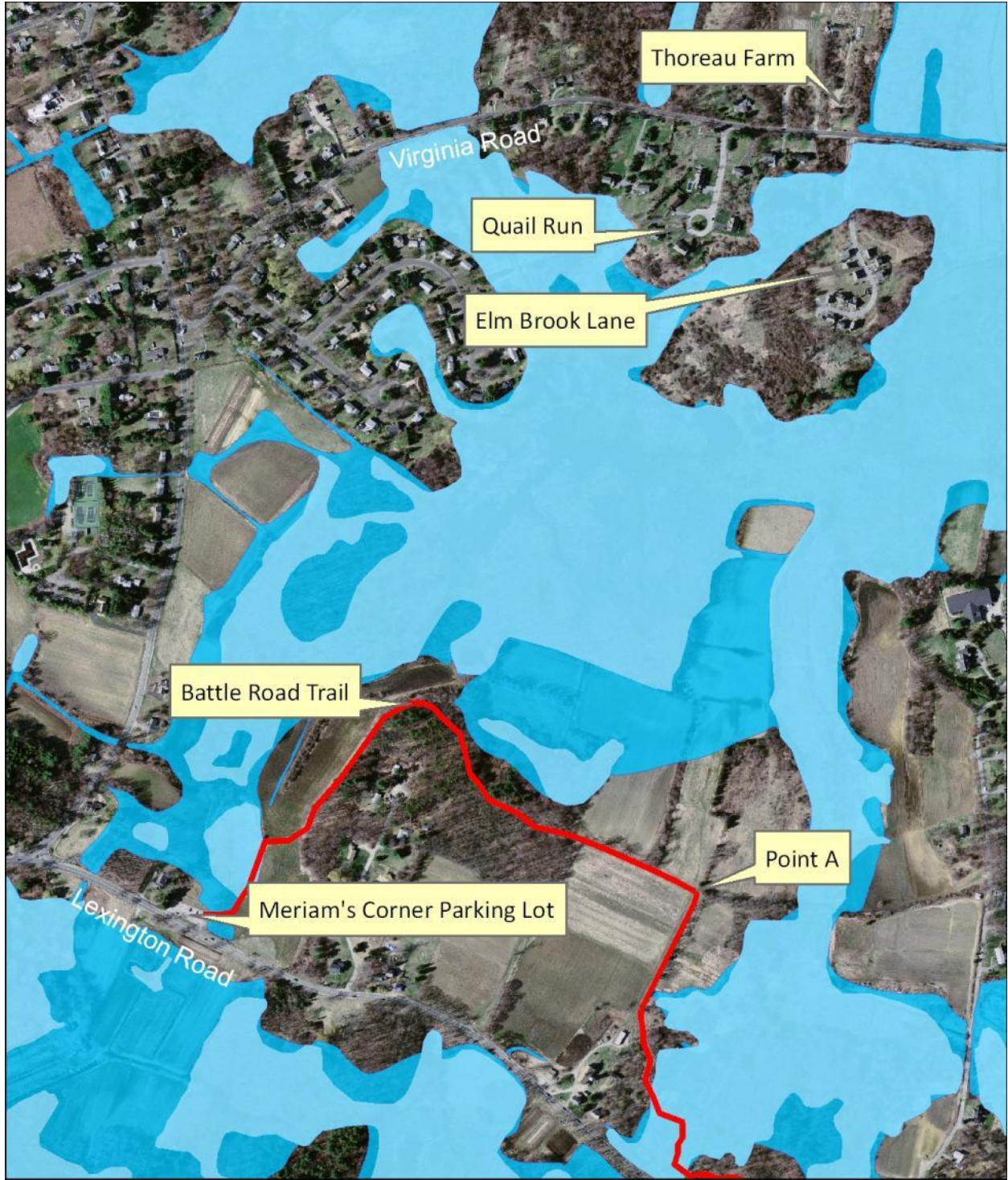


Figure 2 -- Wetlands between Thoreau Farm and the Battle Road Trail

-  DEP Wetlands
-  Concord Wetlands Conservancy District

0 250 500 1,000 Feet



Concord and MassGIS data were used to map the floodplain and wetlands. Aerial photos and field investigations were used to determine vegetation. Representatives of Thoreau Farm Trust, National Park Service, the Town of Concord, and the Elm Brook Lane Homeowners Association walked the potential trail areas in the Spring of 2012 to view and discuss potential trail alignments.

This Phase One effort to update the 2012 proposal began with two stakeholders' meetings arranged by the Thoreau Farm Trust – one with the residents of Elm Brook Lane and one with the National Park Service in October 2019.

In addition to these meetings Bill Giezentanner visited the site several times between November 2019 and March 2020 (Nov. 27, Dec. 5, Jan. 20, and Feb. 20) to explore the possible alternatives and see the area under a variety of weather conditions. Many of the same sources of information, Town of Concord and MassGIS, aerial photos, and Google maps were examined to update any data. In addition, information from the Soil Survey of Middlesex County was added to the Phase One report to show more clearly the factors that could influence trail construction such as soil depth, permeability, depth to water table, and frequency of flooding or ponding.

The first phase of this update was to delve more deeply into alternatives to the route proposed in 2012, partly to meet requirements of the National Park Service, but also to fully explore the possibility that a better alternative might be found. The conclusion of Phase One showed Alternative C (almost the same route as was proposed in 2012) as the shortest route with the least cost and least environmental impact. This second phase report includes a more detailed layout of the trail, a work outline for building the trail segments, and detailed budget estimates for permitting and construction.

The proposed route (Alternative C shown on the cover of this report) begins at the Battle Road Trail where the Battle Road Trail turns south toward the Olive Stow House. The proposed route runs along the eastern edge of the field until it reaches an historic stone wall. It skirts around this stone wall and enters a grove of cedar trees where it continues through the grove and comes out along the edge of the next field. It then proceeds along the field edge until it reaches the Elm Brook wetlands where it would cross the wetlands by a proposed boardwalk to the Hebb land. It proceeds through the Hebb land and around the Elm Brook Lane neighborhood to the Thoreau Farm. The total distance for Alternative C is approximately 4,150 feet.

Trail Layout

During the Summer of 2020, the approximate route of the trail was flagged, bushwhacked, and modestly cleared to better evaluate the route in detail and allow the project team to invite town and National Park representatives to experience the potentials of the trail to connect the two historic sites. The cleared route also served as a means of allowing more accurate cost estimates. Because of dense stands of invasive plants

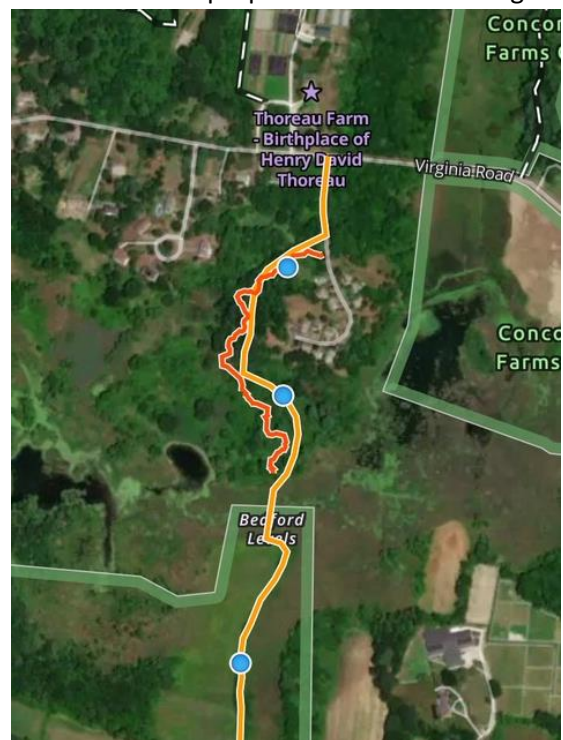


Figure 3 - GPS track of first bushwhacked route

and brambles the cleared route around the Elm Brook Lane neighborhood and through the Hebb Land (shown in orange in Figure 3) deviates from the proposed route as it passes through the Hebb land and around the Elm Brook Lane neighborhood. Subsequently, with help from volunteers with the Concord Trails Committee, a route was cleared that more closely follows the originally proposed route (Figure 4 – shown in green).

The layout minimizes environmental impacts and cost. It crosses the Elm Brook wetlands at their narrowest location.

The total layout is approximately 4,150 feet long. It includes 2,200 feet along the agricultural fields owned by the National Park Service; a 270-foot raised boardwalk crossing of the Elm Brook wetlands; and 1,675 feet from the Elm Brook crossing to the Thoreau Farm site as it passes around the Elm Brook Lane neighborhood and crosses the Hebb land. The width of the treadway is proposed to be 42 inches except for the helical pier boardwalk and other boardwalks which are proposed to be 4-foot wide with 8-foot-wide bump-outs. Wheelchair access will require bump-outs at least every 300 feet so two wheelchairs going in opposite directions can pass.

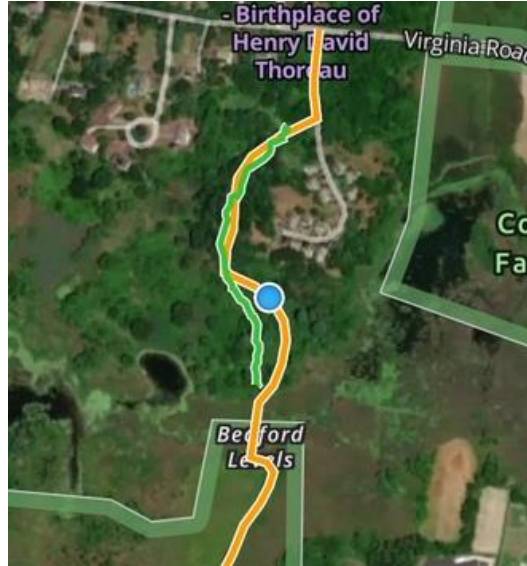


Figure 4 - GPS track of second cleared route

Work Outline for Building Trail

From Battle Road north

| Trai Segment | Reference | Soil Condition | Work Needed/Comments |
|------------------------|--|---|---|
| 1 0 to 345 feet | Hedgerow along field (345 ft.) | Upland, moderate permeability, not in floodplain (FP), seasonally muddy | Clearing, leveling, geotextile base, gravel trail mix |
| 2 345 to 495 feet | Along edge of cedar grove and stonewall (150 ft.) | Upland, moderate permeability, not in floodplain, seasonally muddy | Some clearing up to stone wall, leveling, geotextile base, gravel trail mix. Note: do not disturb historic stone wall. |
| 3 495 to 980 feet | Inside of cedar grove (485 ft.) | Upland, moderate permeability, not in floodplain | Some clearing – treadway can be natural surface (gravel may be required to accommodate wheelchair use) |
| 4 980 to 1,665 feet | Along edge of field with alder hedgerow to right and cattail marsh beyond (685 ft.) | Within wetland Buffer Zone (BZ). Moderate permeability, seasonally muddy, in floodplain | Leveling, geotextile base, gravel trail mix; or boardwalk |

| | | | |
|---------------------|---|--|--|
| 5 1,665 to 2,205 | Along edge of field with alder hedgerow to right and cattail mars beyond (540 ft.) | Within wetland Buffer Zone. In floodplain, moderate permeability | Boardwalk (4-feet wide with curbs on each side and two 8-foot-wide bump-outs to accommodate wheelchair use) |
| 6 2,205 to 2,475 | Crossing of Elm Brook wetland (cattail marsh – 270 ft.) | Wetland crossing | Helical pier raised boardwalk (4 feet wide with two 8-foot bump-outs and handrails) – 4 feet above the water surface |
| 7 2,475 to 4,150 | Along a cleared way from the Elm Brook crossing to the street crossing to the Thoreau Farm (1,675 feet) | Upland, moderate to rapid permeability, some in floodplain and wetland Buffer Zone | Some clearing and leveling – treadway can be natural surface (gravel base would be required to accommodate wheelchairs) |

Trail Surface Types

Building the proposed trail could involve at least four types of surfaces: Natural surface (with gravel base if intended to be accessible) and three types of structures; geotextile and gravel trail mix because of deep and wet soils, a 270-foot raised boardwalk built on helical piers, and boardwalks built on either an aluminum post/auger system or a puncheon system where the agricultural land is too wet and muddy. These four alternatives are described in more detail in Appendix A – Construction Details.

The proposed crossing of the Elm Brook wetlands and the boardwalks could be accessible. The geotextile trail and trail on natural surface would need a gravel trail mix suitable for wheelchair use if the trail is to be accessible. One option that has been discussed has been to make the trail accessible from its connection to the Battle Road to and including the Elm Brook wetlands crossing, but not including the natural surface trail around the Elm Brook Lane neighborhood. Stairs down from the raised boardwalk (segment 6) onto the Hebb land would help discourage bicycle use.



Figure 5- Edge of field at intersection with Battle Road (Jan. 16, 2021)

This report presents four alternatives for the use of these trail surfaces in Appendix B – Cost Estimates. **Alternative 1** uses geotextile with gravel trail mix for all the sections that are too wet and muddy for a natural surface (trail segments 1, 2, 4, and 5). It is the least expensive but involves the most expense to create compensatory flood storage by excavating and removing 240 cubic yards of soil.

Alternative 2 uses a combination of geotextile with gravel trail mix and puncheon boardwalks for these wet and muddy segments (geotextile with gravel trail mix for trail segments 1,2, and 4; puncheon

boardwalk for segment 5). This alternative reduces the amount of excavation to create compensatory flood storage to 145 cubic yards but increases costs.

Alternative 3 uses a combination of geotextile with gravel trail mix, puncheon boardwalks, and aluminum post/auger boardwalks for these wet and muddy segments (geotextile with gravel trail mix for trail segment 1 and 4; puncheon boardwalk for segment 2; and the aluminum post/auger boardwalk for segment 5). This alternative reduces the amount of excavation to create compensatory flood storage to 133 cubic yards but increases cost.

Alternative 4 uses a combination of geotextile with gravel trail mix and aluminum post/auger boardwalks for these wet and muddy segments (geotextile with gravel trail mix for trail segment 1 and 2; and aluminum post/auger boardwalk for segments 4 and 5). This alternative eliminates the need to create compensatory flood storage but increases cost.

The trail segment 7, across the Hebb land and around the Elm Brook Lane neighborhood could be built without permits and by volunteer labor if it is less than 3 feet wide.

Permitting

Mass Audubon was a major participant in the adoption of the Wetlands Protection Act (WPA) in the early 1960s whose purpose is to protect these important habitats. At the same time, Audubon believes for people to value natural resources they must have some degree of familiarity and knowledge of them. For that to happen access is key. Providing access to natural areas is a keystone of Mass Audubon's mission and it has considerable experience in developing trails and boardwalks and working with the regulations.

As indicated in Figure 2, a large portion of this proposed trail is in or adjacent to wetlands subject to Concord, state and federal jurisdiction, or their legally defined buffer areas and the 100-year floodplain and will require the issuance of permits under local, state, and potentially federal regulations. Each of these regulations requires that impacts to wetlands be avoided where practicable, minimized to the extent feasible, and that unavoidable impacts be mitigated. It is worth noting that the DEP Wetlands regulations at 310 CMR 10.02 (b) state "The following minor activities, provided that they comply with 310 CMR10.02(2)(b)1., are not otherwise subject to regulation under M.G.L. c. 131, § 40: a. Unpaved pedestrian walkways less than 30 inches wide for private use and less than three feet wide for public access on conservation property". This provision could apply to the section north of the proposed wetlands crossing (segment 7) if it is not intended to be made accessible. All the area south of the wetlands crossing (segments 1, 2, 3, 4, and 5) require structures because of the wet soils if the trail is to be open year-round. Such structures would be subject to wetland regulations regardless of width.

The alternatives analysis conducted in Phase One of this study shows that the preferred option, Alternative C, avoids wetlands to the extent practicable and minimizes wetland and flooding impacts by using minimum trail widths and structures or the creation of compensatory flood storage, to provide year-round use.

The precise analysis of work within jurisdictional wetland areas, the amount of wetland impact, and any mitigation will be determined during the subsequent design phase of the project when wetland boundaries will be delineated and precisely located. Following this step, the appropriate local, state, and federal permit applications would be prepared and submitted.

The chart below indicates the types of impacts anticipated by the proposed trail surface alternatives.

| Trail surface | Impacts | Regulation |
|---|--|---|
| Natural surface | Alter soil and vegetation (gravel fill if intended for wheelchair use) | Local and state WPA if more than 3 feet wide or intended for wheelchair use |
| Geotextile and gravel fill Note: Located on edge of agricultural fields. | Places fill Loss of flood storage (in floodplain) | Local and state WPA Corps of Engineers if fill is in wetland |
| Elevated helical pier boardwalk or aluminum post/auger boardwalks Note: Helical pier supported boardwalk crosses Elm Brook wetlands. | Minor | Local and State WPA |

It is our opinion that it would be feasible to secure the necessary permits for this project, and that the trail can be designed and constructed in accordance with the appropriate regulatory performance standards. However, additional coordination between the design/construction team and the Concord Natural Resources Department is necessary prior to initiating the final design and permitting process. For example, fill in wetland and loss of flood storage capacity can be permitted if there is mitigation. For example, WPA can allow up to 5,000 sf of wetland alteration with replacement. The replacement in this case could be allowing 5,000+ sf of the adjacent farmland to revert to cattail marsh. Fill in the floodplain could be allowed if compensatory flood storage is provided – excavating and removing soil out of the floodplain. Permitting will also require additional design, especially for the helical pier boardwalk and to determine the exact quantities for some of the impacts.

The Notice of Intent (NOI) permit application should include the work to be done and a request for on-going maintenance in perpetuity. Maintenance will include trimming brush and replacing boards or repairing the boardwalk structures.

The budget outlined in the appendix includes an estimate of costs for permitting but no estimate for additional design.

Conclusion

This new trail link would provide visitors to Thoreau Farm an opportunity to explore Minuteman National Historical Park and vice versa, would serve as local walking path for residents of Elm Brook Lane and employees of businesses along Virginia Road. In addition, the helical pier boardwalk across the marsh would be an attractive destination for close observation of this natural community that is otherwise difficult to experience up close.

In the larger context, this trail link would connect the Battle Road Trail with trails that lead north from Thoreau Farm through the Town of Bedford's Vanderhoof Conservation Area and Mary Putnam Webber Wildlife Preserve and on to the Minuteman path extension, contributing to a network of trails serving Concord and surrounding communities.

The proposed trail promises to link two exceptional historic places and periods: the 18th century Battle Road and the War of Independence with the house where one of America's most influential 19th

century writers was born. The near mile long walk through farmland, wetlands, and woods will offer visitors a deeper understanding of these natural landscapes.

Four alternative cost estimates provided in Appendix B range from approximately \$215,000 to \$300,000 (including a rough estimate for permitting), depending on several options and on requirements that may be imposed during the permitting process. The mass Audubon Ecological Extension Service recommends alternative 4 in Appendix B because it avoids fill in the floodplain and is the most likely to be approved by the town and Massachusetts Department of Environmental Protection. The Appendix also shows several potential additions for a recommended upgrading of boardwalk decking from pressure treated wood to more long-lasting black locust. The added cost for black locust will save maintenance costs over time.

The fundraising goal should also include an amount (10% of the total amount) to endow on-going maintenance.

Concord Trails Committee statement of support for the development of “A Pathway to Join the Thoreau Birthplace to the Battle Road Trail”

The Concord Trails Committee gives its full support to the development of a walking trail between the MMNHP Battle Road Trail and the Thoreau Birthplace farmhouse on Virginia Road. The historical and philosophical linking of these two eras of Concord history is viewed as a significant addition to outdoor recreation, as well as an opportunity to observe the marshland habitat it will pass through.

The approximate half mile link would pass through scenic wetlands and bridge a century of philosophy from the April 1775 spirit of American independence to the 1800’s transcendentalist thinking of Henry David Thoreau, who was born here. Visitors of both venues would experience enrichment from easy access between these two historically significant places.

To apply our support to this important project, the Concord Trails Committee eagerly makes itself available to assist as we may be able to. In anticipation of successful completion, the Committee has already deployed a volunteer group that has built out a section of the trail through the Elm Brook Lane conservation restricted property. We give our full, continued support to completion of the project.

Bob White
Concord Trails Committee Chair

May 29, 2022

June 2, 2022

TO: Matthew Johnson, Chair, Concord Select Board
FR: Concord Business Partnership Board of Directors
RE: Trolley Pilot Project

Sent via email

Dear Select Board Chair Johnson:

The Concord Business Partnership (CBP) writes in support of the Town's proposed Trolley Pilot Project. We thank town staff members Erin Stevens, Beth Williams and Elizabeth Hughes for their Trolley Pilot Project presentation at our June 1, 2022 meeting.

We appreciate the Town is looking for ways to efficiently and conveniently provide transportation options to enhance the visitor experience. And, we are encouraged that this pilot will provide valuable data for the Federal Land Access Program grant being sought in collaboration with the National Park Service, Lexington and Lincoln in advance of Rev250.

We strongly recommend this Pilot include access to the businesses, cultural attractions and residents of West Concord. We are all very proud of the growth and robust business community we have witnessed in West Concord and believe any Pilot Program without West Concord representation would be incomplete. We ask the Pilot Program organizers to revisit the route plan to add crossing Route 2 during off-peak travel/traffic hours to be inclusive.

Cc:

Kerry Lafleur, Town Manager

Elizabeth Hughes, Town Planner

Erin Stevens, Public Information and Communications Director

Beth Williams, Economic Vitality and Tourism Manager

From: equackenbush206@gmail.com <equackenbush206@gmail.com>

Sent: Wednesday, June 1, 2022 6:36 PM

To: Matthew Johnson <mjohnson@concordma.gov>; Terri Ackerman <tackerman@concordma.gov>; Linda Escobedo <lescobedo@concordma.gov>; Henry Dane <hdane@concordma.gov>; Mary Hartman <mhartman@concordma.gov>

Cc: Erin Stevens <estevens@concordma.gov>; Marcia Rasmussen <mrasmussen@concordma.gov>; President@concordchamberofcommerce.org <President@concordchamberofcommerce.org>

Subject: A better trolley Pilot--June 6th SB packet

Concord Needs a Better Trolley Pilot

To the Concord Select Board, Martha Rasmussen, Erin Stevens, and Concord Chamber of Commerce

Folks in West Concord learned about the proposed June-Oct 2022 trolley pilot project when a survey, which I believe was authored by the Concord Chamber of Commerce, was forwarded to these business owners.

While I strongly endorse any activities that supports mass transit and Concord business development, I think the proposed pilot is both too narrow and lacks the foundational research to justify the estimated \$100,000 expenditure.

The pilot assumes that tourism is a major source of economic vitality in Concord, and, that because tourists supposedly arrive by train, the trolley must follow the Concord Center MBTA schedule.

I question many of the pilot's assumptions:

Concord tourists arrive by train and just need an easy way to visit business and historic sites

- No research has been done to confirm that Concord Center tourists arrive by train. In my experience (not supported by data), MBTA users include commuters headed into Boston, student from Boston/metro towns coming to Concord Academy, and, in West Concord (completely omitted from this analysis), employees coming to the many employment sites in West Concord.

Tourists drive economic vitality for Concord

- Tourists are one-time or, at best, infrequent customers of Concord's businesses
- Most businesses know that repeat customers are core to sustainable cashflow. This means local workers and MetroWest people who are attracted to the unique characteristics of Concord businesses.
- The poster child for this draw of foot traffic and the associated health of all nearby businesses is Debra's Natural Gourmet in West Concord. Debra's store is the reason that so many stores in West Concord are thriving. And West Concord's vibrant art scene reinforces this vitality.
- I sincerely think Concord Center could learn a lot by studying the synergy among the business and between the arts-and-business community in West Concord

A Concord Center pilot, focused on historical sites, will lift all Concord business profits

- Tourists/visitors/customers in our town need to come back over and over again based on the vibrancy and diversity of our retail, cultural, agricultural, and historical offerings

- How much does our amazing revolutionary history drive the financial success for the diversity of businesses in Concord Center and West Concord?

Build it and they will come?

- This pilot is too rushed. How will visitors at the Concord Center MBTA even know that the trolley exists? The pilot lacks any marketing. How will we know, if the pilot falls short of goals (not set, by the way), if the shortfall was the structural design or lack of marketing?
- Concord Center is a short, and quite lovely, walk from the train station, passing by our amazing and historic library. Walkers may just fall in love with our town as they walk down the very lovely walk down either Sudbury Rd or Main Street. A trolley may actually disconnect visitors from the beauty of our town.

My recommendation:

- At the very least, define a set of metrics that will measure the success of the pilot.
- Target the metrics to specific, meaningful goals:
 - What types of visitors get off at the Concord MBTA? (tourists, residents, students,)
 - What locations are they likely to visit in the next day? (stores, library, restaurants, historical sites)
 - How frequently do they expect to come to Concord?
- Delay the pilot for one year
 - To incorporate a wider view of how visitors arrive in Concord and what stores they visit
 - To include ALL of Concord—West Concord and Concord Center
 - To expand the “attractions” beyond our wonderful revolutionary sites (the current stops on the trolley) all the amazing sites in Concord
- **What is the rush??**
 - **The 250th is not until April 19, 2025**

With Respect,

Ellen Quackenbush
206 Prairie St
West Concord