



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

1

Call to Order Joint Select Board Meeting

Requested by: SB Chair

Action Sought: Call to Order

Proposed Motion(s)

Open Joint Meeting: Select Board, FinCom, School Committee

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



OLD NORTH BRIDGE

TOWN OF CONCORD

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

Joint Select Board FinCom/School Committee Amended Agenda

Monday, November 18, 2024 at 6:00 PM
 Town House, Public Hearing Room, 22 Monument Square

Join Zoom Meeting

<https://us02web.zoom.us/j/82418539970?pwd=OQ4OZjz65Luch1bHjJeroKVMoYgko1.1>

Meeting ID: 824 1853 9970

Passcode: 479295


Dial In Toll-Free: 833 928 4608

#	Time *	Agenda Item
I.	6:00 PM	Joint Select Board Meeting – Select Board, FinCom, School Committee
II.	7:15 PM	Public Hearing – Fiscal Year 2025 Tax Classification Presenter: Meredith Stone, Town Assessor
III.	8:30 PM	Public Comment: Public Comment is limited to up to 15 minutes, with no more than 3 minutes allocated to any one speaker. Public Comment is limited to items that are not on the agenda.
IV.	8:45 PM	Consent Agenda: i. Meeting Minutes: November 4, 2024 ii. Town Accountant Warrants: October 31, 2024; November 4, 2024 iii. Gift Acceptances: a. Concord 250 Gift Account from Anne W. Hayden in the amount of \$2,500 for the purpose of the Discover Concord Ad Campaign b. Concord250 Gift Account from The Fenn School in the amount of \$5,000 for the purpose of the 250 Memorial Trees c. Concord250 Gift Account from The Middlesex School in the amount of \$50,000 for the purpose of the 250 Memorial Trees iv. One Day Liquor License for Wines & Malt Beverages Only for the Concord250 Corporation for the Patriots Ball on Saturday, April 12, 2025 from 6:00 PM to 11:00 PM at the National Guard Armory, 91 Everett Street v. APP#10 Residential Exemption for Dr. Kurt Herman, of Carlisle Ma, to remain on the 2229 Main Task Force for the term to expire May 31, 2025, the formal completion date of the project.

V.	8:45 PM	Select Board Nominations: i. Agnes Lubega-Kalisa of 12 Nathan Pratt Drive Unit 4 to the Diversity, Equity and Inclusion Commission for a term to expire May 31, 2027. ii. Edward Bernard of 42 Elsinore Street to the Concord Cultural Council for a term to expire May 31, 2027.
VI.	8:50 PM	Town Manager's Report
VII.	8:55 PM	Chair's Report
VIII.	9:00 PM	Discuss Select Board Liaison Report Updates
IX.	9:05 PM	Discuss and Vote to Approve Public Seating License Agreement by the Town for Placement of Benches on Private Property Presenter: Mimi Graney, Economic Development Director
X.	9:15 PM	Discuss and Vote to Approve Recreation Requesting Authorization for more than 2 Food Trucks at the Town Tree Lighting on December 1, 2024 Presenter: Leigh Jackson, Recreation Director
XI.	9: 20 PM	Discuss and Vote to Approve PILOT policy Presenter: Kerry LaFleur, Town Manager and Anthony Ansaldi, Town Chief Financial Officer

** Times are approximate and subject to change*

Upcoming Meetings:
Monday, December 2, 2024 Monday, December 16, 2024 Monday, January 6, 2025

	<p>The Town of Concord endeavors to make public meetings accessible to all members of the community. To request a meeting accommodation or modification, please contact our ADA Coordinator Jessica Porter at jporter@concordma.gov or at 978-318-3028. Please make any requests for accommodation or modifications at least two (2) business days prior to the scheduled meeting.</p>
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Concord Finance Committee
AGENDA ACTION REQUEST

November 18, 2024

Discuss FY26 Capital budget Process

Presentation of FY26-FY30 Financial Forecast and FY26-FY35
“unvetted” Capital Improvement Plan

Requested by: SB Chair

Action Sought: discussion dependent

Proposed Motion(s)

None anticipated.

Additional Information

This meeting is the 2nd of 3 meetings regarding the FY26 Capital Budget process. The first meeting was held on August 19th, of which our internal working group, consisting of the Town Manager, CFO, Superintendent of Schools, and Asst. Supt. of Finance and Operations, presented an updated Tier proposal as well as proposed funding request. Tonight’s meeting will be a FY26-FY30, and a presentation of the FY26-FY35 “unvetted” Capital Improvement Plan. The next tri-board meeting will be to present the FY26 recommended Capital Improvement plan and the updated FY26-FY35 plan.

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



THE TOWN OF
CONCORD
MASSACHUSETTS

**FY26-FY30 Financial Forecast
for
FY26-FY35 Capital Improvement Plan
Overview of Request**

Meeting of the Select Board, Finance Committee, and School Committee
Monday, November 18, 2024



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Agenda

- FY26-FY30 Financial Forecast
- FY26-FY35 Capital Improvement Plan - Overview of all Request
 - Capital Outlay
 - Tier I
 - Tier II
 - Tier II



THE TOWN OF
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MASSACHUSETTS

Five-Year Revenue Forecast

- Property Taxes
- State Aid
- Local Receipts
- Other Financing Sources



THE TOWN OF
CONCORD
 MASSACHUSETTS

Property Taxes

Levy Limit Calculation	Estimated FY2025	Projected				
		FY2026	FY2027	FY2028	FY2029	FY2030
Prior Year Levy Limit	\$ 106,213,177	\$ 110,152,006	\$ 113,905,806	\$ 117,753,451	\$ 121,697,287	\$ 125,739,720
Add: 2.5% Increase	\$ 2,655,329	\$ 2,753,800	\$ 2,847,645	\$ 2,943,836	\$ 3,042,432	\$ 3,143,493
Add: New Growth	\$ 1,283,499	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000
Levy Limit	\$ 110,152,006	\$ 113,905,806	\$ 117,753,451	\$ 121,697,287	\$ 125,739,720	\$ 129,883,213
Add: Debt Exclusions	\$ 10,114,676	\$ 11,490,185	\$ 10,957,677	\$ 10,875,527	\$ 10,044,027	\$ 9,393,902
Maximum Allowable Levy	\$ 120,266,682	\$ 125,395,991	\$ 128,711,128	\$ 132,572,814	\$ 135,783,747	\$ 139,277,115
Projected Property Tax Use						
Base	\$ 106,544,005	\$ 110,143,926	\$ 113,892,117	\$ 117,720,103	\$ 121,666,207	\$ 125,704,899
Less: Debt Exclusions	\$ 10,114,676	\$ 11,490,185	\$ 10,957,677	\$ 10,875,527	\$ 10,044,027	\$ 9,393,902
Total Projected Tax Levy	\$ 116,658,682	\$ 121,634,111	\$ 124,849,794	\$ 128,595,630	\$ 131,710,234	\$ 135,098,801
Unused Levy Capacity	\$ 3,608,000	\$ 3,761,880	\$ 3,861,334	\$ 3,977,184	\$ 4,073,512	\$ 4,178,313
Total Tax Levy	\$ 116,658,682	\$ 121,634,111	\$ 124,849,794	\$ 128,595,630	\$ 131,710,234	\$ 135,098,801



THE TOWN OF
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 MASSACHUSETTS

State Aid

	FY2025 Estimates	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
A. Education						
Chapter 70	\$ 4,240,305	\$ 4,346,313	\$ 4,454,970	\$ 4,566,345	\$ 4,680,503	\$ 4,797,516
Charter Tuition reimbursement	\$ 26,106	\$ 26,759	\$ 27,428	\$ 28,113	\$ 28,816	\$ 29,537
Sub-Total, All education Items	\$ 4,266,411	\$ 4,373,071	\$ 4,482,398	\$ 4,594,458	\$ 4,709,319	\$ 4,827,052
B. General Government						
Unrestricted General Government Aid	\$ 1,428,463	\$ 1,464,175	\$ 1,500,779	\$ 1,538,298	\$ 1,576,756	\$ 1,616,175
Veterans Benefits	\$ 36,003	\$ 36,903	\$ 37,826	\$ 38,771	\$ 39,741	\$ 40,734
Exemp: VBS and Elderly	\$ 27,335	\$ 28,018	\$ 28,719	\$ 29,437	\$ 30,173	\$ 30,927
State Owned land	\$ 894,439	\$ 916,800	\$ 939,720	\$ 963,213	\$ 987,293	\$ 1,011,976
Public Libraries	\$ 49,638	\$ 50,879	\$ 52,151	\$ 53,455	\$ 54,791	\$ 56,161
Sub-Total, All General Government	\$ 2,435,878	\$ 2,496,775	\$ 2,559,194	\$ 2,623,174	\$ 2,688,754	\$ 2,755,972
C. Total Estimated Receipts	\$ 6,702,289	\$ 6,869,846	\$ 7,041,592	\$ 7,217,632	\$ 7,398,073	\$ 7,583,025
B. State Assessments and Charges						
Air Pollution Districts	\$ 9,603	\$ 9,843	\$ 10,089	\$ 10,341	\$ 10,600	\$ 10,865
Metropolitan Area Planning Council	\$ 10,048	\$ 10,299	\$ 10,557	\$ 10,821	\$ 11,091	\$ 11,368
RMV Non-Renewal Surcharge	\$ 5,980	\$ 6,130	\$ 6,283	\$ 6,440	\$ 6,601	\$ 6,766
Sub-Total, State Assessments	\$ 25,631	\$ 26,272	\$ 26,929	\$ 27,602	\$ 28,292	\$ 28,999
C. Transportation Authorities						
MBTA	\$ 447,439	\$ 458,625	\$ 470,091	\$ 481,843	\$ 493,889	\$ 506,236
Sub-Total, Transportation Assessmen	\$ 447,439	\$ 458,625	\$ 470,091	\$ 481,843	\$ 493,889	\$ 506,236
E. Tuition Assessments						
School Choice Sending Tuition	\$ 19,604	\$ 20,094	\$ 20,596	\$ 21,111	\$ 21,639	\$ 22,180
Charter School Sending Tuition	\$ 50,956	\$ 52,230	\$ 53,536	\$ 54,874	\$ 56,246	\$ 57,652
Sub-Total, tuition Assessments	\$ 70,560	\$ 72,324	\$ 74,132	\$ 75,985	\$ 77,885	\$ 79,832
F. Total Estimated Charges	\$ 543,630	\$ 557,221	\$ 571,151	\$ 585,430	\$ 600,066	\$ 615,067
Total State Aid	\$ 6,158,659	\$ 6,312,625	\$ 6,470,441	\$ 6,632,202	\$ 6,798,007	\$ 6,967,957



THE TOWN OF
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MASSACHUSETTS

Local Receipts

	FY2025 Estimates	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
Local Receipts						
Motor Vehicle Excise	\$ 3,766,902	\$ 3,917,578	\$ 4,074,281	\$ 4,237,252	\$ 4,406,742	\$ 4,583,012
Farm Excise	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Interest	\$ 2,000,000	\$ 1,750,000	\$ 1,750,000	\$ 1,750,000	\$ 1,750,000	\$ 1,750,000
Pilot Programs	\$ 31,671	\$ 33,254	\$ 34,917	\$ 36,663	\$ 38,496	\$ 40,421
Misc Revenue Non-Recc	\$ 60,840	\$ 60,840	\$ 60,840	\$ 60,840	\$ 60,840	\$ 60,840
Meals Tax	\$ 471,872	\$ 495,466	\$ 520,239	\$ 546,251	\$ 573,564	\$ 602,242
Room Occupancy	\$ 537,828	\$ 551,273	\$ 565,055	\$ 579,182	\$ 593,661	\$ 608,503
Jet Fuel	\$ 475,000	\$ 475,000	\$ 475,000	\$ 475,000	\$ 475,000	\$ 475,000
Opioid Settlement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
In Lieu of Taxes	\$ 25,000	\$ 50,000	\$ 100,000	\$ 200,000	\$ 400,000	\$ 800,000
Migrant Aid	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Unrealized Gains	\$ 133,189	\$ 133,189	\$ 133,189	\$ 133,189	\$ 133,189	\$ 133,189
Supplemental Re Tax	\$ 65,989	\$ 65,989	\$ 65,989	\$ 65,989	\$ 65,989	\$ 65,989
sub-total, local receipts	\$ 7,568,291	\$ 7,532,590	\$ 7,779,510	\$ 8,084,366	\$ 8,497,481	\$ 9,119,195



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Other Financing Sources

Funds From Other Sources						
Transfers	\$ 2,731,331	\$ 2,799,614	\$ 2,869,605	\$ 2,941,345	\$ 3,014,879	\$ 3,090,251
Fees	\$ 1,462,819	\$ 1,499,389	\$ 1,536,874	\$ 1,575,296	\$ 1,614,678	\$ 1,655,045
Rentals	\$ 68,584	\$ 68,721	\$ 68,859	\$ 68,997	\$ 69,135	\$ 69,273
Permits & Licenses	\$ 1,736,164	\$ 1,753,525	\$ 1,771,061	\$ 1,788,771	\$ 1,806,659	\$ 1,824,725
Misc Revenue	\$ 225,904	\$ 225,904	\$ 225,904	\$ 225,904	\$ 225,904	\$ 225,904
Fines	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000
Health Services Overhead	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000
sub-total, funds from other sources	\$ 6,299,802	\$ 6,422,154	\$ 6,547,302	\$ 6,675,312	\$ 6,806,254	\$ 6,940,198



THE TOWN OF
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Five-Year Revenue Forecast

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
REVENUES						
Property Taxes	\$ 116,658,682	\$ 121,634,111	\$ 124,849,794	\$ 128,595,630	\$ 131,710,234	\$ 135,098,801
Total State Aid	\$ 6,158,659	\$ 6,312,625	\$ 6,470,441	\$ 6,632,202	\$ 6,798,007	\$ 6,967,957
Total Local Receipts, and Other Sources	\$ 13,868,092	\$ 13,954,744	\$ 14,326,812	\$ 14,759,678	\$ 15,303,735	\$ 16,059,393
Total Revenues	\$ 136,685,433	\$ 141,901,480	\$ 145,647,048	\$ 149,987,510	\$ 153,811,977	\$ 158,126,152



THE TOWN OF
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MASSACHUSETTS

Five-Year Expenditure Forecast

- Town Government
- Joint Accounts
- Schools
- Capital Outlay



THE TOWN OF
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 MASSACHUSETTS

Town Government

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
EXPENSES						
Town Government						
General Government	\$ 6,002,619	\$ 6,226,724	\$ 6,459,793	\$ 6,702,184	\$ 6,954,272	\$ 7,216,443
Finance	\$ 2,599,727	\$ 2,703,716	\$ 2,811,865	\$ 2,924,339	\$ 3,041,313	\$ 3,162,965
Planning and Land Management	\$ 2,628,721	\$ 2,733,870	\$ 2,843,225	\$ 2,956,954	\$ 3,075,232	\$ 3,198,241
Human Services	\$ 3,488,951	\$ 3,628,509	\$ 3,773,649	\$ 3,924,595	\$ 4,081,579	\$ 4,244,842
Public Safety	\$ 12,106,896	\$ 12,591,172	\$ 13,094,819	\$ 13,618,611	\$ 14,163,356	\$ 14,729,890
Public Works	\$ 5,112,219	\$ 5,316,707	\$ 5,529,376	\$ 5,750,551	\$ 5,980,573	\$ 6,219,796
Unclassified	\$ 806,506	\$ 821,044	\$ 835,945	\$ 851,218	\$ 866,874	\$ 882,921
Total Town Government	\$ 32,745,639	\$ 34,021,742	\$ 35,348,671	\$ 36,728,453	\$ 38,163,198	\$ 39,655,098

- Our forecast assumes a +4.0% increase in expenditures



THE TOWN OF
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 MASSACHUSETTS

Joint Accounts (Town & CPS)

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
EXPENSES						
Joint Accounts (Town & Concord Public Schools)						
Group Insurance	\$ 8,000,000	\$ 9,176,160	\$ 10,002,014	\$ 10,902,196	\$ 11,883,393	\$ 12,952,899
Property/ Liability Insurance	\$ 539,412	\$ 593,353	\$ 652,689	\$ 717,957	\$ 789,753	\$ 868,728
Unemployment	\$ 140,760	\$ 143,575	\$ 146,447	\$ 149,376	\$ 152,363	\$ 155,410
Worker's Compensation	\$ 176,149	\$ 193,764	\$ 213,140	\$ 234,454	\$ 257,900	\$ 283,690
Social Security & Medicare	\$ 1,028,735	\$ 905,172	\$ 950,430	\$ 997,952	\$ 1,047,849	\$ 1,100,242
sub-total:	\$ 9,885,056	\$ 11,012,024	\$ 11,964,720	\$ 13,001,935	\$ 14,131,259	\$ 15,360,969
Retirement Assessment, General Fund	\$ 4,349,746	\$ 3,584,157	\$ 3,727,523	\$ 3,876,624	\$ 4,031,689	\$ 4,192,956
Retirement Assessment, Pension Reserve	\$ 1,650,000	\$ 1,580,403	\$ 1,513,500	\$ 1,842,608	\$ 1,771,045	\$ 1,697,035
sub-total:	\$ 5,999,746	\$ 5,164,560	\$ 5,241,023	\$ 5,719,232	\$ 5,802,734	\$ 5,889,991
Debt Service, Within Levy Limit						
A1. Town, Principal & Interest	\$ 3,576,699	\$ 4,533,436	\$ 3,865,223	\$ 3,362,344	\$ 2,690,750	\$ 2,379,750
A2. CPS, Principal & Interest	\$ 806,651	\$ 904,470	\$ 819,852	\$ 794,632	\$ 665,250	\$ 568,125
A3. Interest on Short-Term Notes	\$ 70,000	\$ -	\$ -	\$ -	\$ -	\$ -
sub-total:	\$ 4,453,350	\$ 5,437,906	\$ 4,685,075	\$ 4,156,975	\$ 3,356,000	\$ 2,947,875
Debt Service, Excluded from Levy Limit						
B1. Town, Principal & Interest	\$ 303,794	\$ 295,294	\$ 187,000	\$ 178,500		
B2. CPS, Principal & Interest	\$ 6,286,880	\$ 7,670,889	\$ 7,246,675	\$ 7,173,025	\$ 6,520,025	\$ 5,869,900
B3. Interest on Short-Term Notes		\$ -	\$ -	\$ -	\$ -	\$ -
sub-total:	\$ 6,590,674	\$ 7,966,183	\$ 7,433,675	\$ 7,351,525	\$ 6,520,025	\$ 5,869,900
Total: Joint Accounts	\$ 26,928,826	\$ 29,580,673	\$ 29,324,493	\$ 30,229,667	\$ 29,810,018	\$ 30,068,736



THE TOWN OF
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MASSACHUSETTS

Schools

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
EXPENSES						
Schools						
Minuteman Tech.	\$ 1,732,806.00	\$ 1,802,118.24	\$ 1,874,202.97	\$ 1,949,171.09	\$ 2,027,137.93	\$ 2,108,223.45
Concord Public Schools	\$ 46,515,714.00	\$ 48,376,342.56	\$ 50,311,396.26	\$ 52,323,852.11	\$ 54,416,806.20	\$ 56,593,478.45
CCRS D	\$ 26,140,908.00	\$ 27,186,544.32	\$ 28,274,006.09	\$ 29,404,966.34	\$ 30,581,164.99	\$ 31,804,411.59
Total, Schools	\$ 74,389,428	\$ 77,365,005	\$ 80,459,605	\$ 83,677,990	\$ 87,025,109	\$ 90,506,113
Total Expenses	\$ 134,063,892	\$ 140,967,419	\$ 145,132,769	\$ 150,636,110	\$ 154,998,325	\$ 160,229,947

- Our forecast assumes a +4.0% increase in expenditures



THE TOWN OF
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 MASSACHUSETTS

Five-Year Budget Forecast

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
REVENUES						
Property Taxes	\$ 116,658,682	\$ 121,634,111	\$ 124,849,794	\$ 128,595,630	\$ 131,710,234	\$ 135,098,801
Total State Aid	\$ 6,158,659	\$ 6,312,625	\$ 6,470,441	\$ 6,632,202	\$ 6,798,007	\$ 6,967,957
Total Local Receipts, and Other Sources	\$ 13,868,092	\$ 13,954,744	\$ 14,326,812	\$ 14,759,678	\$ 15,303,735	\$ 16,059,393
Total Revenues	\$ 136,685,433	\$ 141,901,480	\$ 145,647,048	\$ 149,987,510	\$ 153,811,977	\$ 158,126,152
EXPENSES						
Total Town Government	\$ 32,745,639	\$ 34,021,742	\$ 35,348,671	\$ 36,728,453	\$ 38,163,198	\$ 39,655,098
Total: Joint Accounts	\$ 26,928,826	\$ 29,580,673	\$ 29,324,493	\$ 30,229,667	\$ 29,810,018	\$ 30,068,736
Total, Schools	\$ 74,389,428	\$ 77,365,005	\$ 80,459,605	\$ 83,677,990	\$ 87,025,109	\$ 90,506,113
Total Expenses	\$ 134,063,892	\$ 140,967,419	\$ 145,132,769	\$ 150,636,110	\$ 154,998,325	\$ 160,229,947
Capital Outlay (3% goal)						
Town Budget	\$ 32,745,639	\$ 34,021,742	\$ 35,348,671	\$ 36,728,453	\$ 38,163,198	\$ 39,655,098
CPS Budget	\$ 46,515,714	\$ 48,376,343	\$ 50,311,396	\$ 52,323,852	\$ 54,416,806	\$ 56,593,478
Total	\$ 79,261,353	\$ 82,398,084	\$ 85,660,067	\$ 89,052,305	\$ 92,580,004	\$ 96,248,576
3% of Town/School Budget Combined	\$ 2,180,000	\$ 2,471,943	\$ 2,569,802	\$ 2,671,569	\$ 2,777,400	\$ 2,887,457
OPEB Assessment	\$ 1,364,609	\$ 1,364,609	\$ 1,364,609	\$ 1,364,609	\$ 1,364,609	\$ 1,364,609
Total Town Surplus/(Deficit)	\$ (923,068)	\$ (2,902,491)	\$ (3,420,132)	\$ (4,684,777)	\$ (5,328,357)	\$ (6,355,862)
Unused Levy Capacity	\$ 3,608,000	\$ 3,761,880	\$ 3,861,334	\$ 3,977,184	\$ 4,073,512	\$ 4,178,313
Projected Unused Levy Capacity	\$ 2,684,932	\$ 859,389	\$ 441,202	\$ (707,593)	\$ (1,254,845)	\$ (2,177,548)



THE TOWN OF
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MASSACHUSETTS

Five-Year Budget Forecast Assumptions

Revenues

- New growth remains constant
- State Aid grows at 2.5% per year
- MV Excise grows at 4%
- Interest revenue decreases with interest rates

Expenses

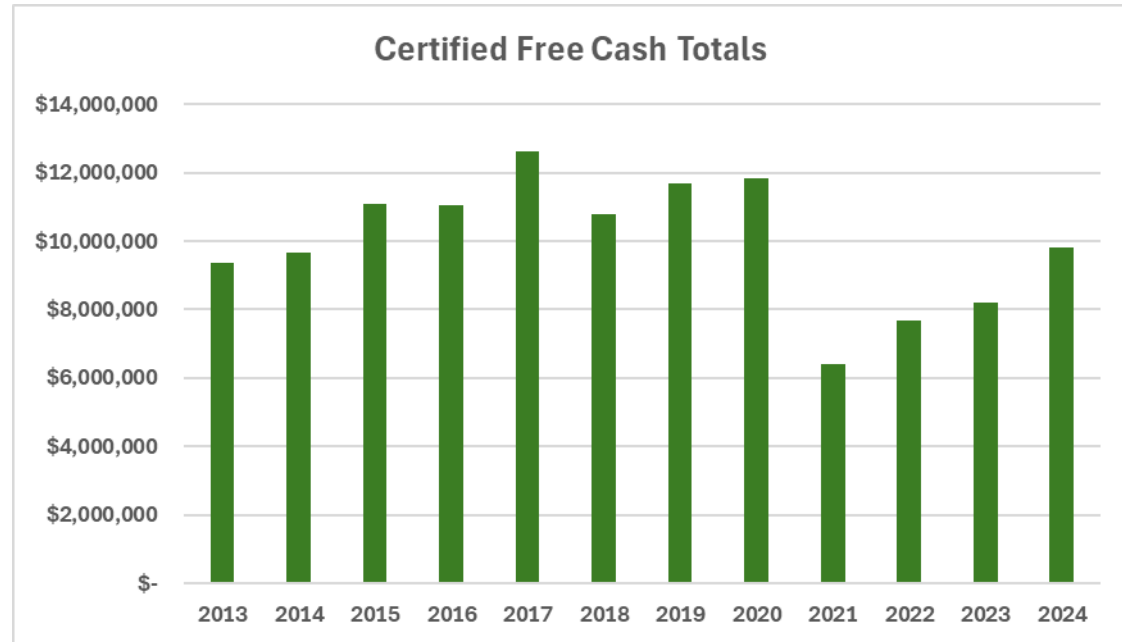
- Town, CPS, CCRSD & MVRTHS grows at 4%
- Health Insurance adjusted for FY25 w/12% increase
- Property/Liability grows at 10%
- SS/Medicare – 5% growth after recognizing \$175,000 savings in FY25



THE TOWN OF
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MASSACHUSETTS

Free Cash

Year	Amount
2013	\$ 9,357,662
2014	\$ 9,664,489
2015	\$ 11,084,916
2016	\$ 11,040,933
2017	\$ 12,605,955
2018	\$ 10,798,936
2019	\$ 11,683,672
2020	\$ 11,839,956
2021	\$ 6,398,206
2022	\$ 7,695,461
2023	\$ 8,190,415
2024	\$ 9,820,395
2025	



Under sound financial policies, a community strives to generate free cash in an amount equal to three to five percent of its annual budget. This goal helps deter free cash from being depleted in any particular year, which enables the following year's calculation to begin with a positive balance.



THE TOWN OF
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MASSACHUSETTS

10 Year Capital Improvement Plan

Town*

Requested

194 Capital
Requests

\$376,910,057 Total Capital
Costs

CPS

Requested

54 Capital
Request

\$28,042,322 Total Capital
Cost

**Town – Includes Town, CMLP, Water, Sewer, Recreation & Beede*



THE TOWN OF
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 MASSACHUSETTS

Town Capital Request Summary

	FY2026	FY2027	FY2028	FY2029	FY2030	FY2031	FY2032	FY2033	FY2034	FY2035	Total
General Government											
Information Systems	\$ 633,200	\$ 153,000	\$ 186,000	\$ 109,000	\$ 112,000	\$ 282,000	\$ 158,200	\$ 163,000	\$ 176,000	\$ 127,000	\$ 2,099,400
Resource Sustainability	\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75,000
Total	\$ 708,200	\$ 153,000	\$ 186,000	\$ 109,000	\$ 112,000	\$ 282,000	\$ 158,200	\$ 163,000	\$ 176,000	\$ 127,000	\$ 2,174,400
Finance											
Finance Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Planning & Land Management											
Planning Administration	\$ -	\$ 275,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 275,000
Natural Resources	\$ 40,000	\$ 120,000	\$ 15,000	\$ 65,000	\$ 15,000	\$ 20,000	\$ 95,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 430,000
Inspections	\$ 100,000	\$ 50,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,000
Health	\$ 60,000	\$ -	\$ -	\$ -	\$ 70,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 130,000
Economic Vitality & Tourism	\$ 150,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,000
Total	\$ 350,000	\$ 445,000	\$ 15,000	\$ 65,000	\$ 85,000	\$ 20,000	\$ 95,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 1,135,000
Human Services											
Library	\$ 90,250	\$ 32,000	\$ 32,000	\$ 34,000	\$ 34,000	\$ 34,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 396,250
Senior Services	\$ 175,000	\$ -	\$ -	\$ -	\$ -	\$ 200,000	\$ -	\$ -	\$ -	\$ -	\$ 375,000
Total	\$ 265,250	\$ 32,000	\$ 32,000	\$ 34,000	\$ 34,000	\$ 234,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 771,250
Public Safety											
Police Department	\$ 392,200	\$ 320,000	\$ 299,000	\$ 221,000	\$ 243,200	\$ 147,000	\$ 74,000	\$ 9,000	\$ 6,000	\$ 6,000	\$ 1,717,400
Fire Department	\$ 1,260,652	\$ 625,000	\$ 414,000	\$ 140,600	\$ 66,500	\$ 2,245,300	\$ 309,000	\$ 1,256,500	\$ 1,947,800	\$ 1,701,800	\$ 9,967,152
Total	\$ 1,652,852	\$ 945,000	\$ 713,000	\$ 361,600	\$ 309,700	\$ 2,392,300	\$ 383,000	\$ 1,265,500	\$ 1,953,800	\$ 1,707,800	\$ 11,684,552
Public Works											
Engineering	\$ 8,738,300	\$ 8,607,800	\$ 9,240,700	\$ 7,756,450	\$ 9,122,375	\$ 5,572,663	\$ 5,876,692	\$ 6,193,281	\$ 6,522,393	\$ 6,865,997	\$ 74,496,651
Highway Maintenance	\$ 840,000	\$ 275,000	\$ 950,000	\$ 625,000	\$ 305,000	\$ 395,000	\$ 1,590,000	\$ 10,000	\$ 730,000	\$ 450,000	\$ 6,170,000
Parks & Trees	\$ 465,000	\$ 505,000	\$ 210,000	\$ 135,000	\$ 290,000	\$ 340,000	\$ 10,000	\$ 10,000	\$ 100,000	\$ 340,000	\$ 2,405,000
Cemetery	\$ 400,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 760,000
Facilities	\$ 4,397,500	\$ 12,650,000	\$ 89,975,000	\$ 975,000	\$ 975,000	\$ 975,000	\$ 975,000	\$ 1,075,000	\$ 6,025,000	\$ 975,000	\$ 118,997,500
Total	\$ 14,840,800	\$ 22,077,800	\$ 100,415,700	\$ 9,531,450	\$ 10,732,375	\$ 7,322,663	\$ 8,491,692	\$ 7,328,281	\$ 13,417,393	\$ 8,670,997	\$ 202,829,151
Grand Totals	\$ 17,817,102.00	\$ 23,652,800.00	\$ 101,361,700.00	\$ 10,101,050.00	\$ 11,273,075.00	\$ 10,250,963.00	\$ 9,162,892.00	\$ 8,811,781.00	\$ 15,602,193.00	\$ 10,560,797.00	\$ 218,594,353.00



THE TOWN OF
CONCORD
MASSACHUSETTS

Town – Non-General Fund

Department	FY2026	FY2027	FY2028	FY2029	FY2030	FY2031	FY2032	FY2033	FY2034	FY2035	Total
Total Beede Swim And Fitness Center	\$ 1,656,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,656,000
Sewer Grand Total	\$ 2,898,000	\$ 8,763,000	\$ 8,691,417	\$ 17,725,188	\$ 527,000	\$ 548,000	\$ 569,000	\$ 592,000	\$ 616,000	\$ 641,000	\$ 41,570,604
Total Water Distribution	\$ 5,598,000	\$ 31,767,300	\$ 31,781,300	\$ 11,342,000	\$ 2,245,000	\$ 2,353,000	\$ 2,621,000	\$ 2,596,500	\$ 2,702,000	\$ 2,810,000	\$ 95,816,100
Total Electric Light Plant	\$ 4,148,500	\$ 2,637,500	\$ 5,225,000	\$ 260,000	\$ 275,000	\$ 1,460,000	\$ 1,450,000	\$ 1,260,000	\$ 275,000	\$ 1,610,000	\$ 18,601,000
Total	\$ 14,300,500	\$ 43,167,800	\$ 45,697,717	\$ 29,327,188	\$ 3,047,000	\$ 4,361,000	\$ 4,640,000	\$ 4,448,500	\$ 3,593,000	\$ 5,061,000	\$ 157,643,704



THE TOWN OF
CONCORD
MASSACHUSETTS

Tier I Capital

Per Concord Policy

	FY2025 Estimates/Budgeted	FY2026 Projected	FY2027 Projected	FY2028 Projected	FY2029 Projected	FY2030 Projected
Capital Outlay (3% goal)						
Total Budget	\$ 132,141,017	\$ 138,108,501	\$ 145,303,971	\$ 149,567,180	\$ 155,172,288	\$ 159,640,334
Capital Outlay at 3%	\$ 3,964,231	\$ 4,143,255	\$ 4,359,119	\$ 4,487,015	\$ 4,655,169	\$ 4,789,210
Capital Outlay at 2%	\$ 2,642,820	\$ 2,762,170	\$ 2,906,079	\$ 2,991,344	\$ 3,103,446	\$ 3,192,807
Appropriated Capital	\$ 2,180,000					



THE TOWN OF
CONCORD
MASSACHUSETTS

Tier II Capital (Debt Service within Levy)

Per Concord Policy

\$4,000,000 - \$5,000,000 per year



THE TOWN OF
CONCORD
MASSACHUSETTS

Tier III Capital

Per Concord Policy

Debt Exclusion

Request Title	Request Groups	Department	FY 2026 Capital Cost	FY 2027 Capital Costs	FY 2028 Capital Costs	FY 2029 Capital Costs	FY 2030 Capital Costs	Total
New Public Safety Building	Public Works	Facilities	\$ -	\$ 3,500,000	\$ 35,000,000	\$ -	\$ -	\$ 38,500,000
New Public Works Building & Campus	Public Works	Facilities	\$ -	\$ 5,400,000	\$ 54,000,000	\$ -	\$ -	\$ 59,400,000
Road Pavement Management	Public Works	Engineer	\$ 5,000,000	\$ 5,250,000	\$ 5,512,500	\$ 4,788,000	\$ 5,027,500	\$ 25,578,000
Total			\$ 5,000,000	\$ 14,150,000	\$ 94,512,500	\$ 4,788,000	\$ 5,027,500	\$ 123,478,000



THE TOWN OF
CONCORD
MASSACHUSETTS

Capital Improvement Plan Potential Excluded Debt Projects

Request Title	Request Groups	Department	FY 2026 Capital Cost	FY 2027 Capital Costs	FY 2028 Capital Costs	FY 2029 Capital Costs	FY 2030 Capital Costs	Total
New Public Safety Building	Public Works	Facilities	\$ -	\$ 3,500,000	\$ 35,000,000	\$ -	\$ -	\$ 38,500,000
New Public Works Building & Campus	Public Works	Facilities	\$ -	\$ 5,400,000	\$ 54,000,000	\$ -	\$ -	\$ 59,400,000
Road Pavement Management	Public Works	Engineer	\$ 5,000,000	\$ 5,250,000	\$ 5,512,500	\$ 4,788,000	\$ 5,027,500	\$ 25,578,000
Total			\$ 5,000,000	\$ 14,150,000	\$ 94,512,500	\$ 4,788,000	\$ 5,027,500	\$ 123,478,000



THE TOWN OF
CONCORD
MASSACHUSETTS

FY26 Town/School (by funding source)

FY2026								
	Capital Outlay	Tier1	Tier2	Tier3	Grants	Revolving	Other	Total
General Government								
Information Systems	\$ 20,000	\$ 613,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 633,200
Resource Sustainability		\$ 75,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75,000
Total	\$ 20,000	\$ 688,200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 708,200
Finance								
Finance Administration	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Total	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Planning & Land Management								
Planning Administration	\$ -	\$ -	\$ 275,000.00	\$ -	\$ -	\$ -	\$ -	\$ 275,000.00
Natural Resources	\$ -	\$ 40,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 40,000.00
Inspections	\$ -	\$ 100,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 100,000.00
Health	\$ -	\$ 60,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 60,000.00
Economic Vitality & Tourism	\$ -	\$ 150,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 150,000.00
Total	\$ -	\$ 350,000.00	\$ 275,000.00	\$ -				\$ 625,000.00
Human Services								
Library	\$ -	\$ 90,250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,250.00
Senior Services	\$ -	\$ 175,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 175,000.00
Total	\$ -	\$ 265,250.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 265,250.00
Public Safety								
Police Department	\$ 47,000.00	\$ 345,200.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 392,200.00
Fire Department	\$ 42,000.00	\$ 283,731.00	\$ 350,000.00	\$ -	\$ 34,921.00	\$ 550,000.00	\$ -	\$ 1,260,652.00
Total	\$ 89,000.00	\$ 628,931.00	\$ 350,000.00	\$ -	\$ 34,921.00	\$ 550,000.00	\$ -	\$ 1,652,852.00
Public Works								
Engineering	\$ -	\$ 653,400.00	\$ 3,084,900.00	\$ 5,000,000.00	\$ -	\$ -	\$ -	\$ 8,738,300.00
Highway Maintenance	\$ -	\$ 45,000.00	\$ 795,000.00	\$ -	\$ -	\$ -	\$ -	\$ 840,000.00
Parks & Trees	\$ -	\$ 465,000.00	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 465,000.00
Cemetery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 400,000.00	\$ 400,000.00
Facilities	\$ -	\$ 307,500.00	\$ 2,040,000.00	\$ -	\$ -	\$ 2,050,000.00	\$ -	\$ 4,397,500.00
Total	\$ -	\$ 1,470,900.00	\$ 5,919,900.00	\$ 5,000,000.00	\$ -	\$ 2,050,000.00	\$ 400,000.00	\$ 14,840,800.00
Concord Public Schools								
Total	\$ -	\$ 908,010.00	\$ -	\$ -	\$ -	\$ -	\$ 627,004.00	\$ 1,535,014.00
Grand Total								
Total	\$ 109,000.00	\$ 4,311,291.00	\$ 6,544,900.00	\$ 5,000,000.00	\$ 34,921.00	\$ 2,600,000.00	\$ 1,027,004.00	\$ 18,092,102.00



THE TOWN OF
CONCORD
MASSACHUSETTS

Concord Public Schools

**Concord Public Schools
FY26 - FY35 Capital Plan - DRAFT**

Key

yellow shaded sections are totals by school
green shaded sections are ideally funded by an energy perf mgmt contract, or green community grant
brown shaded items may be eligible for MSBA funds

School / Category	FY26	FY27	FY28	FY29	FY30	FY31 - 35	FY26 Requests
Alcott	663,979	-	284,492	1,357,009		2,178,000	
ADA Accessibility	20,475					-	ADA Accessibility Panels in multiple locations for accessibility and compliance
Asphalt / paving				1,119,993		-	
Boilers - Perf Mgmt						240,000	
Building Exterior	12,600					16,000	Restore / replace sections of façade and exterior
Cafeteria Equipment						80,000	
Doors / Locks						136,000	
Flooring			12,012	55,016		524,880	
HVAC - Perf Mgmt	94,500	-		182,000		312,000	Replace heating controls system which are 20 years old, are outdated and do not allow the building to be adequately controlled; \$15K of this is to replace an old split system in computer classroom
Lighting - Perf Mgmt	517,504					-	Replace all fluorescent lighting across the entire building with energy efficient lighting
Lighting Controls			156,000			-	
Plumbing - Perf Mgmt						32,000	
Roofing	18,900		116,480			837,120	Replace damaged sections of roofing
CMS	350,000						
Exterior site improvements	350,000						Irrigations for new CMS athletic fields
District	30,000	31,000	16,000	16,500	17,000	170,000	
Office Equipment	30,000	31,000	16,000	16,500	17,000	170,000	Copier replacement plan
Knox Trail	56,000						
Vehicle fleet / equipment	56,000						Replace old pneumatic lifts in Knox Trail garage
Ripley	108,945	573,300	634,566	451,100	1,311,890	856,798	
Asphalt / paving					1,153,940	-	
Boilers			50,000				
Boilers - Perf Mgmt			157,500			-	
Building Exterior	93,945			335,920		26,000	Repairs to various sections of the façade and exterior

School / Category	FY26	FY27	FY28	FY29	FY30	FY31 - 35	FY26 Requests
Doors / Locks					125,450	-	
Electric				97,500		-	
Flooring		-				295,252	
HVAC - Perf Mgmt	15,000	-	-	-	32,500	119,250	Split system needed for IT server room
Lighting - Perf Mgmt						334,737	
Lighting Controls		-	100,421			22,048	
Miscellaneous		-	326,645			19,510	
Roofing		573,300		17,680		-	
Windows/ Glazing (interior)						40,000	
Thoreau	216,440	637,670	174,200	97,500	1,052,177	1,209,300	
Asphalt / paving					702,854	-	
Boilers - Perf Mgmt	-	91,000		97,500	312,000	-	
Building Exterior					23,400	-	
Cafeteria Equipment						80,000	
Doors / Locks						152,000	
Electric						41,600	
Flooring					13,923	700,500	
Lighting - Perf Mgmt		546,670	-			-	
Lighting Controls			97,500			-	
Miscellaneous						216,000	
Plumbing - Perf Mgmt			65,000			-	
Roofing	216,440		11,700			-	Thoreau roof is in the worst condition of elementary school buildings, requires new roofing and new roofing membrane, active leaks and constant repairs
Windows/ Glazing (interior)						19,200	
Vehicle	75,000	100,000		105,000		315,000	Pickup truck for bus mechanic for responding to service calls on the road; existing pickup is 15 yrs old
Willard	34,650	-	681,460	1,687,530	1,028,340	1,521,476	see building exterior below
Asphalt / paving				1,122,030		-	
Boilers - Perf Mgmt					292,500	-	
Building Exterior	34,650					16,000	Refurbish / Replace sections of building façade; repoint masonry and replace flashings, remove and replace sealant joints
Cafeteria Equipment						32,000	
Doors / Locks						88,000	
Exterior site improvements		-	74,620	409,500		-	

School / Category	FY26	FY27	FY28	FY29	FY30	FY31 - 35	FY26 Requests
Flooring			25,090			430,276	
HVAC - Perf Mgmt	-		39,000	58,500	642,500	24,000	
Lighting - Perf Mgmt			542,750			-	
Lighting Controls				97,500		-	
Roofing		-			93,340	931,200	
Grand Total	1,535,014	1,341,970	1,790,718	3,714,639	3,409,407	6,250,574	

Potential Energy Mgmt funded	627,004	637,670	804,250	338,000	1,279,500	1,061,987	
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Total w/out Energy Mgmt items	908,010	704,300	986,468	3,376,639	2,129,907	5,188,587	
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THE TOWN OF
CONCORD
MASSACHUSETTS

Thank you!

Questions?

Concord Public Schools
FY26 - FY35 Capital Plan - DRAFT

Key

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brown shaded items may be eligible for MSBA funds

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ADA Accessibility	20,475					-	ADA Accessibility Panels in multiple locations for accessibility and compliance
Asphalt / paving				1,119,993		-	
Boilers - Perf Mgmt						240,000	
Building Exterior	12,600					16,000	Restore / replace sections of façade and exterior
Cafeteria Equipment						80,000	
Doors / Locks						136,000	
Flooring			12,012	55,016		524,880	
HVAC - Perf Mgmt	94,500	-		182,000		312,000	Replace heating controls system which are 20 years old, are outdated and do not allow the building to be adequately controlled; \$15K of this is to replace an old split system in computer classroom
Lighting - Perf Mgmt	517,504					-	Replace all fluorescent lighting across the entire building with energy efficient lighting
Lighting Controls			156,000			-	
Plumbing - Perf Mgmt						32,000	
Roofing	18,900		116,480			837,120	Replace damaged sections of roofing
CMS	350,000						
Exterior site improvements	350,000						Irrigations for new CMS athletic fields
District	30,000	31,000	16,000	16,500	17,000	170,000	
Office Equipment	30,000	31,000	16,000	16,500	17,000	170,000	Copier replacement plan
Knox Trail	56,000						
Vehicle fleet / equipment	56,000						Replace old pneumatic lifts in Knox Trail garage
Ripley	108,945	573,300	634,566	451,100	1,311,890	856,798	
Asphalt / paving					1,153,940	-	
Boilers			50,000				
Boilers - Perf Mgmt			157,500			-	
Building Exterior	93,945			335,920		26,000	Repairs to various sections of the façade and exterior

School / Category	FY26	FY27	FY28	FY29	FY30	FY31 - 35	FY26 Requests
Doors / Locks					125,450	-	
Electric				97,500		-	
Flooring		-				295,252	
HVAC - Perf Mgmt	15,000	-	-	-	32,500	119,250	Split system needed for IT server room
Lighting - Perf Mgmt						334,737	
Lighting Controls		-	100,421			22,048	
Miscellaneous		-	326,645			19,510	
Roofing		573,300		17,680		-	
Windows/ Glazing (interior)						40,000	
Thoreau	216,440	637,670	174,200	97,500	1,052,177	1,209,300	
Asphalt / paving					702,854	-	
Boilers - Perf Mgmt	-	91,000		97,500	312,000	-	
Building Exterior					23,400	-	
Cafeteria Equipment						80,000	
Doors / Locks						152,000	
Electric						41,600	
Flooring					13,923	700,500	
Lighting - Perf Mgmt		546,670	-			-	
Lighting Controls			97,500			-	
Miscellaneous						216,000	
Plumbing - Perf Mgmt			65,000			-	
Roofing	216,440		11,700			-	Thoreau roof is in the worst condition of elementary school buildings, requires new roofing and new roofing membrane, active leaks and constant repairs
Windows/ Glazing (interior)						19,200	
Vehicle	75,000	100,000		105,000		315,000	Pickup truck for bus mechanic for responding to service calls on the road; existing pickup is 15 yrs old
Willard	34,650	-	681,460	1,687,530	1,028,340	1,521,476	see building exterior below
Asphalt / paving				1,122,030		-	
Boilers - Perf Mgmt					292,500	-	
Building Exterior	34,650					16,000	Refurbish / Replace sections of building façade; repoint masonry and replace flashings, remove and replace sealant joints
Cafeteria Equipment						32,000	
Doors / Locks						88,000	
Exterior site improvements		-	74,620	409,500		-	

School / Category	FY26	FY27	FY28	FY29	FY30	FY31 - 35	FY26 Requests
Flooring			25,090			430,276	
HVAC - Perf Mgmt	-		39,000	58,500	642,500	24,000	
Lighting - Perf Mgmt			542,750			-	
Lighting Controls				97,500		-	
Roofing		-			93,340	931,200	
Grand Total	1,535,014	1,341,970	1,790,718	3,714,639	3,409,407	6,250,574	

Potential Energy Mgmt funded	627,004	637,670	804,250	338,000	1,279,500	1,061,987
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Total w/out Energy Mgmt items	908,010	704,300	986,468	3,376,639	2,129,907	5,188,587
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CONCORD PUBLIC SCHOOLS

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT

120 MERIAM ROAD CONCORD, MA 01742 PHONE 978-318-1500 FAX 978-318-1537 www.concordps.org

To: School Committee, Concord-Carlisle Regional School District

From: Dr. Laurie Hunter, Superintendent
Robert Conry, Assistant Superintendent of Finance and Operations

Date: October 22, 2024

Subject: CCRSD Capital Planning – FY26

District Administration anticipates undertaking a complete assessment of facilities and grounds at CCHS in the time range of 2027 – 2028. In the meantime, capital needs have been identified through internal discussions with Administration, and in School Committee meeting deliberations. Below is a summary of the identified capital priorities for CCRSD over the next few years.

Amenities Building

An Amenities Building adjacent to the CCHS Football / Athletic field on the lower part of campus as a potential capital request. An engineer, Gale Associates, Inc., has been engaged to investigate various options, and present them to the School Committee later this Fall, and to move forward with a full set of bid-ready design specifications for the selected option. This work is anticipated to be completed in March 2025.

At this time, the Administration believes it would be ideal to bring this forward as a capital request for FY27, to allow time for an updated cost estimate of the selected design, and also to allow time to pursue other funding sources (Community Preservation Funds, or other grants) to help defray the costs of this project.

Outdoor Track Facility

The initial discussion on this topic have indicated that this project would be something that the district sought to obtain funding primarily through fundraising efforts. As such, it is not included currently as a cost in the capital plan.

Memorial Field – Turf Replacement

It is anticipated the existing turf has at least a couple years remaining of useful life. The district will investigate whether there are funding sources available to help defray the cost of repairs, and other internal funding sources that may be able to help offset the cost, for example, the facilities rental revolving fund, or athletic revolving funds. Cost estimates will be obtained by leveraging information learned from the Doug White field turf replacement project and shared with the Committee during FY27 budget planning.

CONCORD PUBLIC SCHOOLS

CONCORD-CARLISLE REGIONAL SCHOOL DISTRICT

120 MERIAM ROAD CONCORD, MA 01742 PHONE 978-318-1500 FAX 978-318-1537 www.concordps.org

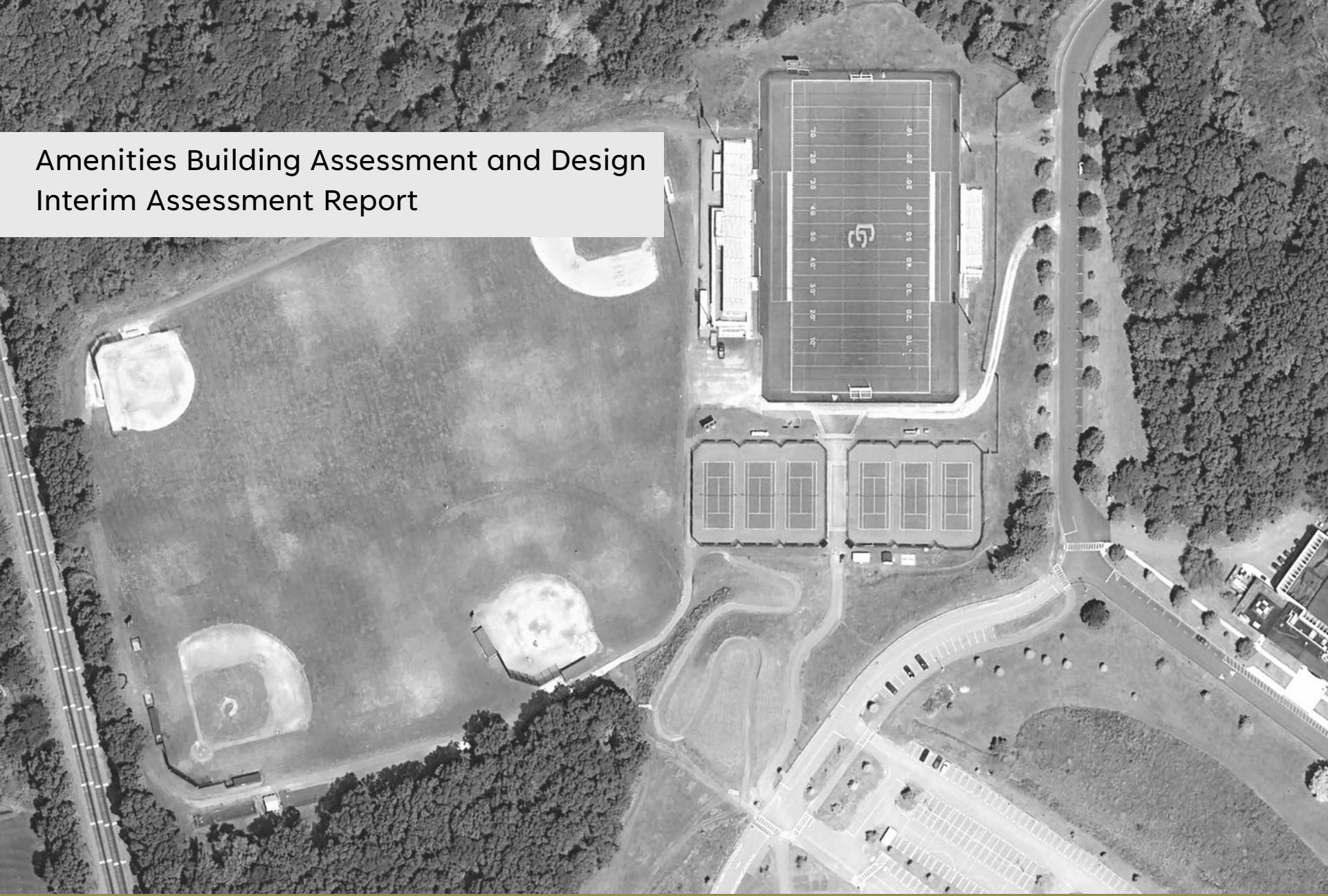
HVAC Replacement

As the large Roof Top Units age, some will fail and need to be replaced. At this point in time, these costs are being absorbed in the operating budget, however, due the number of units, and cost involved, these may need to be factored into future capital planning. Replacing one of the larger RTU's can cost around \$40,000 for the equipment alone, and there are many units on the roof, and costs can add up. Building a surplus balance in the Facilities Rental Revolving Fund that is carried over from year to year would be an ideal way to fund these projects, however, it will take time to grow that fund, and there may also be a need to use those funds to cover unexpected maintenance costs that exceed the operating budget and cannot be offset in other parts of the budget.

Capital Stabilization Fund

We would like to highlight for consideration the inclusion of annual contributions to a Capital Stabilization fund into the regular budget planning process. One of the cited issues from town officials was the difficulty of absorbing large one-time expenses, or an ongoing capital assessment related to a capital project at CCHS. Having a capital stabilization fund to offset capital projects would mitigate this issue. Determining how to fund it is a separate conversation that would need to occur with School Committee and Town Officials.

Amenities Building Assessment and Design Interim Assessment Report



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2. Modular	
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Executive Summary

This report outlines considerations, recommendations, and alternative options for a stand-alone amenities building at the Concord-Carlisle Regional High School.

To meet the expressed program goals, the Gale team recommends that a version of Option 3 (traditional design, bid, build) procurement/construction method be used for realizing the building. There are still several decisions to be made within this overall Option, however we feel it balances the program, cost, and quality to provide the best long-term value.

Options 1A and 1B investigated skid-type trailer modular restrooms. While this option does present a lower cost, it does not provide a concession stand, and it presents challenges for meeting code for permanent restrooms.

Option 2 investigated a pre-fab modular approach to the building. Based on the information we gathered it does not provide a lower cost. Combined with the fact that this process presents some procurement and customization challenges it does not seem like there are any tangible advantages over one of the Option 3 approaches.

Prepared by:

Architecture



150 Wood Road, Suite 1000
Braintree, MA 02184

Civil Engineering



300 LedgeWood Place, Suite 300
Rockland, MA 02370

MEP Engineering



52 Temple Place
Boston, MA 02111

The Site



Project Discovery

During the discovery phase of the project, the needs, goals, and desired outcomes were further defined by the District's building-based staff.

The previously completed feasibility study was used as the starting point of the discussion, from which the following goals were confirmed.

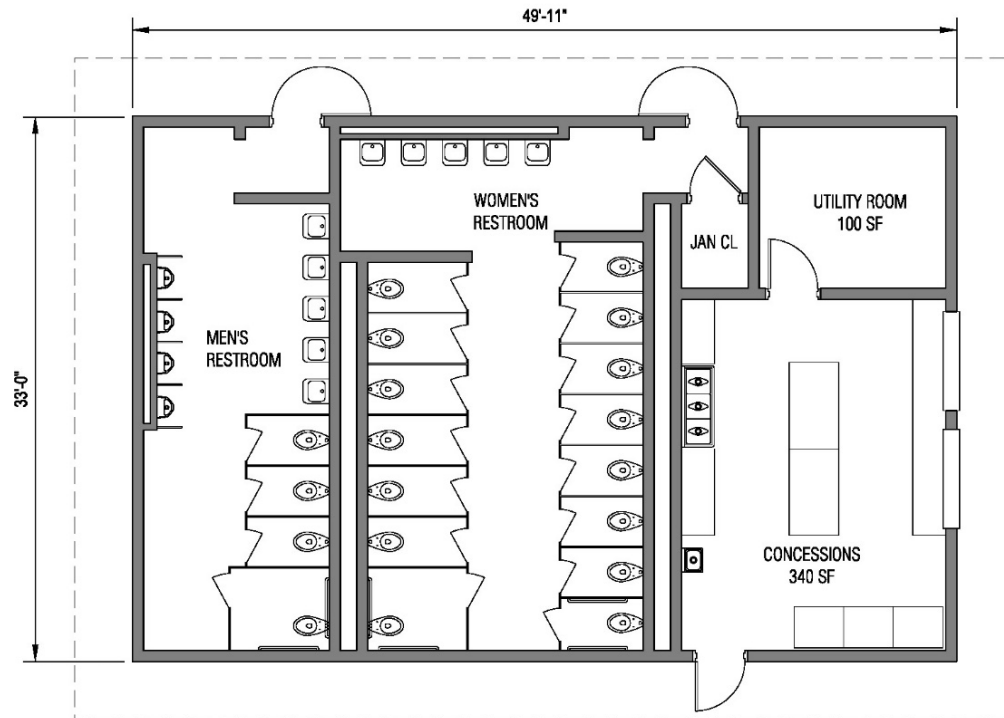
PROJECT GOALS:

- One option should be based on the schematic design developed during the feasibility study of the CCHS campus.
- All options to meet the definition of 'permanent restrooms' as required by MA building code and provide code-required number of restroom fixture counts.
- All options are to have code-required accessible restrooms.
- One option should test the possibility of a lower-cost alternative.

PREVIOUSLY COMPLETED FEASIBILITY STUDY

Floor Plan

Area: 1,650 SF



Code Changes/Requirements

Since the feasibility study was completed, an update to the Uniform MA State Plumbing Code (248 CMR 10.00) became effective on December 8, 2023, and compliance with the new Tenth Edition of the MA State Building Code (CMR 780) will be required for all permit applications received after January 1, 2025.

While most of the code updates do not have a significant impact on the design of the building, the updated Plumbing Code includes significant changes to the restroom fixture quantities required for this type of facility.

The previous version of the Plumbing Code required: 30 WC's and 9 sinks for women, 15 WC's (50% urinals allowed) and 9 sinks for men. Understanding that this requirement was excessive for a high school facility, MA Board of State Examiners of Plumbers and Gas Fitters typically would approve a 50% reduction waiver. This was the approach recommended in the study which resulted in the building being planned to have 15 WC's and 5 sinks for women, 8 WC's (50% urinals allowed) and 5 sinks for men.

The new Plumbing Code assigns different fixture count requirements based on the level of competition of the facility. This recognizes a reduced need for restrooms at the high school level and is consistent with previous waivers that the MA Board of State Examiners of Plumbers and Gas Fitters typically would approve.

One issue is that the sink count requirements were not reduced in the code update, however, we have received a waiver for reducing the sink count in another similar project under the new code and are recommending the same approach for this project.

The requirements and calculations for the required restrooms under the current Uniform MA State Plumbing Code (248 CMR 10.00), and our recommendation for pursuing a waiver for the quantity of sinks are on the following page.

Code Changes/Requirements

The total fixed-seat spectator capacity for Stadium Field is 1,800 people. For this capacity, the code requires; 9 WC's and 12 sinks for women, 7 WC's (67% urinals allowed) and 12 sinks for men. For WC's the building is sized to meet the code having 8 WC's for women, 1 WC single-user restroom, 3 WC's and 4 urinals for men.

The code requirement for more sinks than toilets has been recognized as a code issue through approval of recent waivers granting a reduction. The waiver proposed in this study is for a reduction to 5 sinks for women, 1 sink in single-user restroom, and 5 sinks for men. This puts the sink count at 2/3 of the toilet/urinal count, which is a more typical ratio.

CCHS Amenities Building - Fixture Count NEW CODE

Plumbing Fixture requirements

248 CMR 10 - Uniform State Plumbing Code

Mass. Register #1510, effective 12/8/2023)

Reference:	10.10 Table 1: Minimum Facilities for Building Occupancy	Toilets				Lavatories			
		Females		Males		Female		Male	
Secondary School		up to 300	1 per 60	up to 360	1 per 120	1 per 75		1 per 75	
Outdoor Stadiums		over 300	1 per 150	over 360	1 per 150	1 per 75		1 per 75	

Occupancy	Toilets						Lavatories			
	Females			Males* <small>up to 67% can be urinals</small>			Female		Male	
1800 Total		CALCULATION	ROUND UP		CALCULATION	ROUND UP	CALC.	ROUND UP	CALC.	ROUND UP
900 Each Gender	300	5	5	360	3	3	12	12	12	12
	600	4	4	540	3.6	4				
REQUIRED TOTALS			9			7	12		12	
Recommended Plumbing Code Waiver (sinks 2/3 of toilet count)			no waiver			no waiver	6		5	

Program Confirmation

Once the overall project goals, and code implications were reviewed, the team confirmed the building program needs. A base program was defined that included the minimum program spaces that all options should include. Additional program elements were identified that would be needed to meet the primary goals that were defined for the project.

BASE PROGRAM:

Women's Restroom: Compliant accessible restroom with code required number of fixtures modified by appropriate waiver request.

Men's Restroom: Compliant accessible restroom with code required number of fixtures modified by appropriate waiver request.

Single-User Restroom: Compliant accessible gender-neutral/family single fixture restroom. This restroom will count towards the code fixture count required for women.

Utility Rooms: Water service/electrical rooms as required.

FULL PROGRAM:

Outdoor Water Fountain: Compliant accessible water fountain/bottle filler.

Concessions: Warming kitchen to heat/serve/sell pre-prepared and packaged food and drinks

Options Tested

OPTION 1

Semi-Permanent, Skid pre-fab units



Portable and trailer restrooms were investigated, but these solutions do not meet the code requirement for permanent restrooms.

Skid pre-fab units, if mounted to a foundation and connected to a sanitary waste system are acceptable to the MA Plumbing Board as 'permanent' if the local building inspector gives approval. An accessible walkway/deck system will be needed, and screening can improve the aesthetics.

OPTION 2

Modular Construction



Modular construction would need to follow the alternate procurement process in M.G.L. c. 149, § 44E(4).

Modular construction can meet the program and code requirements of the project. For this delivery process, typically a GC acquires the permit, builds the foundation, slab, and makes the final utility connections. The modular building company builds, delivers, and places the building. There are some material choices and options that can be customized.

OPTION 3

Traditional design/bid/build



This option is based on the previously completed feasibility study, and can provide the full program needs, and be fully code compliant.

This option has the most design customization possible to meet the aesthetic needs of the project.

OPTION 1

Semi-Permanent, skid pre-fab units

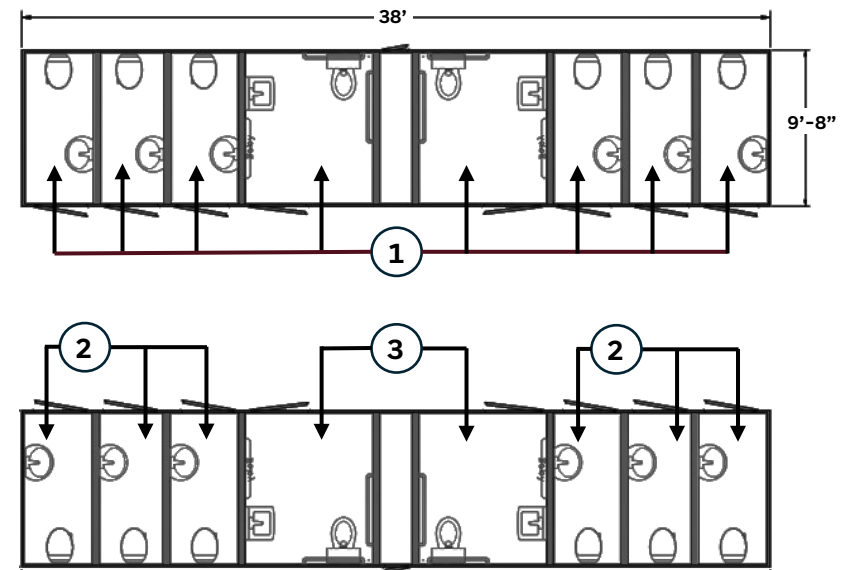
This option investigates the potential to have a lower cost than traditional construction but does have some trade-offs. Modular skid-type restroom units can be permanently mounted to a foundation.

For this study, the option does not include a concessions area. Concession trailers are common, but skid-type 'permanent' units would need to be custom manufactured, and present challenges in meeting the more stringent Health Department requirements for permanent food service kitchens. The team discussed that if this option moved forward, the current concessions would be continued with the option of bringing in a food truck for larger events.

To meet the restroom count, two eight (8) fixture units are recommended. These units each include two (2) accessible restrooms which could be designated as shown to meet the restroom count required for each gender.

Floor Plan

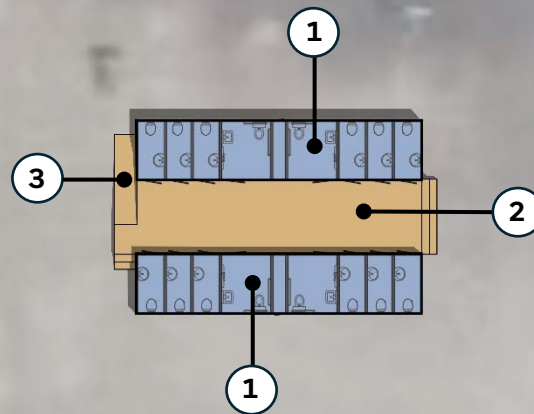
Interior Area: 754 SF



- ① WOMEN'S RESTROOM
- ② MEN'S RESTROOM
- ③ SINGLE-USER/FAMILY RESTROOM

OPTION 1

Semi-Permanent, skid pre-fab units



SITE PLAN

- ① RESTROOM SKID UNITS
- ② ELEVATED DECK/PATIO
- ③ RAMP

OPTION 1

Skid pre-fab units – on foundation

While the aesthetic look of this option presents a challenge, there are things that can be done to improve the design. These examples show some ideas of how these skid-type trailer units can be made to look more permanent.

OPTION 1A – Vinyl Wrap Graphics

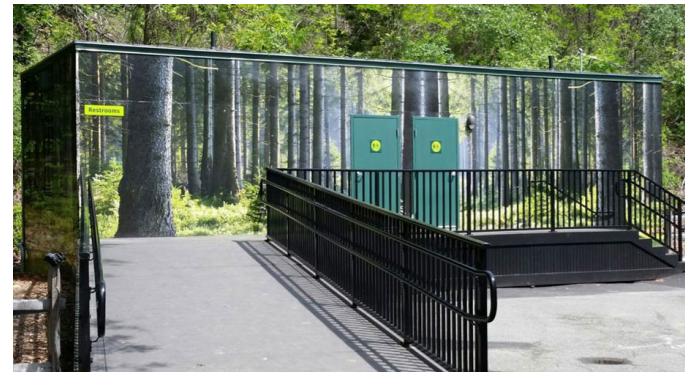
- School branding could be used
- Ramp makes access feel more permanent

OPTION 1B – Deck and screen walls

- Use the need for an elevated walkway to bring natural materials
- Screen units to create a sense of place



Basic skid-unit (not on foundation)



Permanent foundation / vinyl wrap



Deck and wood screens

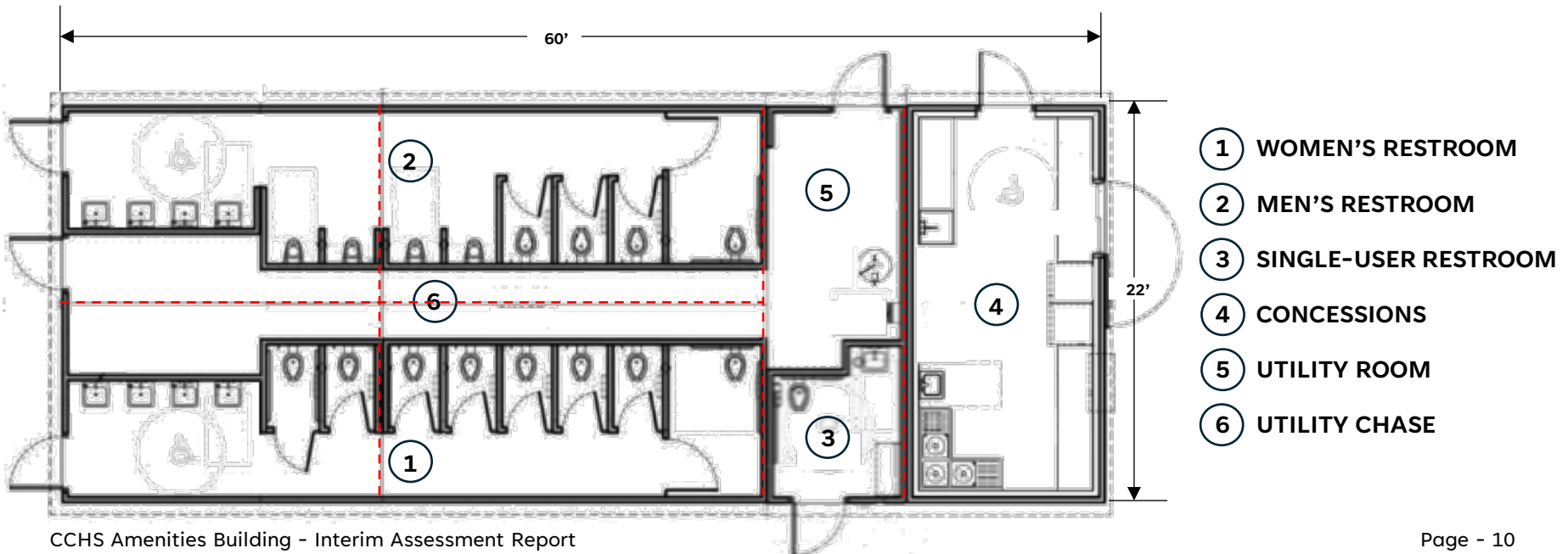
OPTION 2 Modular Construction

Modular construction is an option that can provide the full program. Depending on the manufacturer, this approach can be highly customized, however this will impact the cost. For this study, we assembled a floor plan based on standard units to provide the program at the lowest cost. The red dashed lines indicate each module. As stated earlier this approach would need to be procured under M.G.L. c. 149, § 44E(4). These procedures apply to

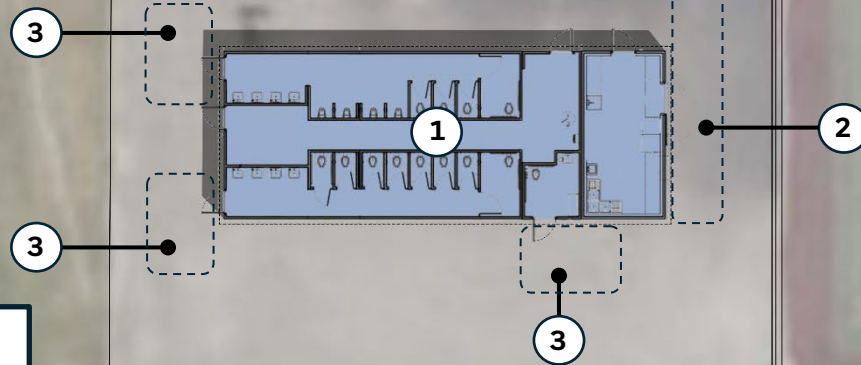
the acquisition and installation of modular buildings, including the solicitation and evaluation of proposals, the award of contracts, and the installation of modular units. Site preparation work, construction of foundations and attachment of modular buildings to utilities can be included as part of the modular building procurement or can be bid separately through the conventional construction bidding procedures.

Floor Plan

Interior Area: 1,320 SF



OPTION 2 Modular Construction



SITE PLAN

- ① MODULAR BUILDING
- ② CONCESSIONS QUEUING
- ③ RESTROOM QUEUING

OPTION 2 Modular Construction

The size and number of modules needed to achieve this project's program will likely impact the cost savings typically seen in this type of construction. In addition, the fixtures inside the building will need to be listed for use in Massachusetts, which also adds cost.

There are several customizations that can enhance the appearance over the standard modular building. While these customizations will also increase the cost, some examples have been provided for reference.

The cost range provided for Option 2 represents the cost range to be expected with the low-end representing a standard configuration and the upper range some level of customization. The manufacturer that assisted in providing costs noted that the pricing would need to be confirmed with the level of customizations that were requested.



Standard Concrete Block



Porch, some added materials/details



Porch, with additional added materials/detail

OPTION 3

Traditional design/bid/build

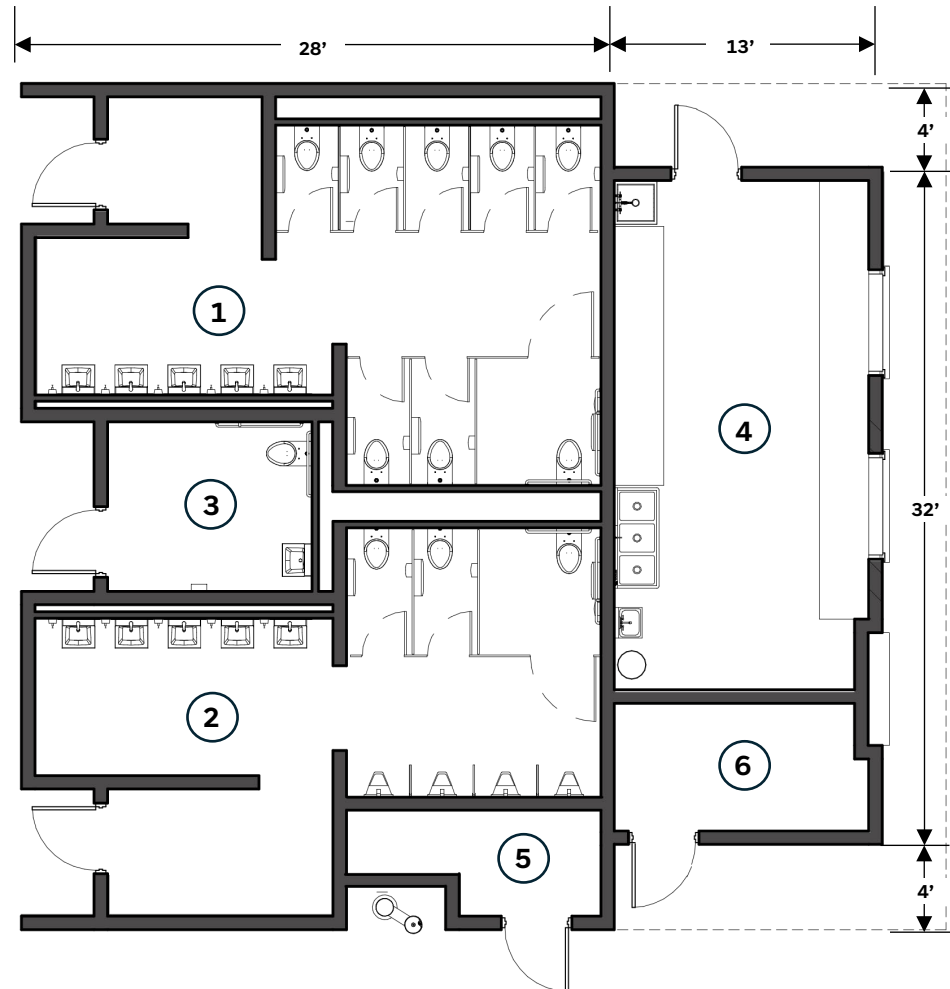
This design option modifies the feasibility study plan with the reduced number of plumbing fixtures per updated code. The program has not significantly changed. However, the updated configuration of the building creates better spectator access, allows views of the field from the concessions area, and provides ample space for service vehicle access around the perimeter.

- ① WOMEN'S RESTROOM
- ② MEN'S RESTROOM
- ③ SINGLE-USER RESTROOM
- ④ CONCESSIONS
- ⑤ WATER SERVICE ROOM
- ⑥ ELECTRICAL ROOM

TOTAL AREA: 1,450 GSF

Floor Plan

Interior Area: 1,450 SF

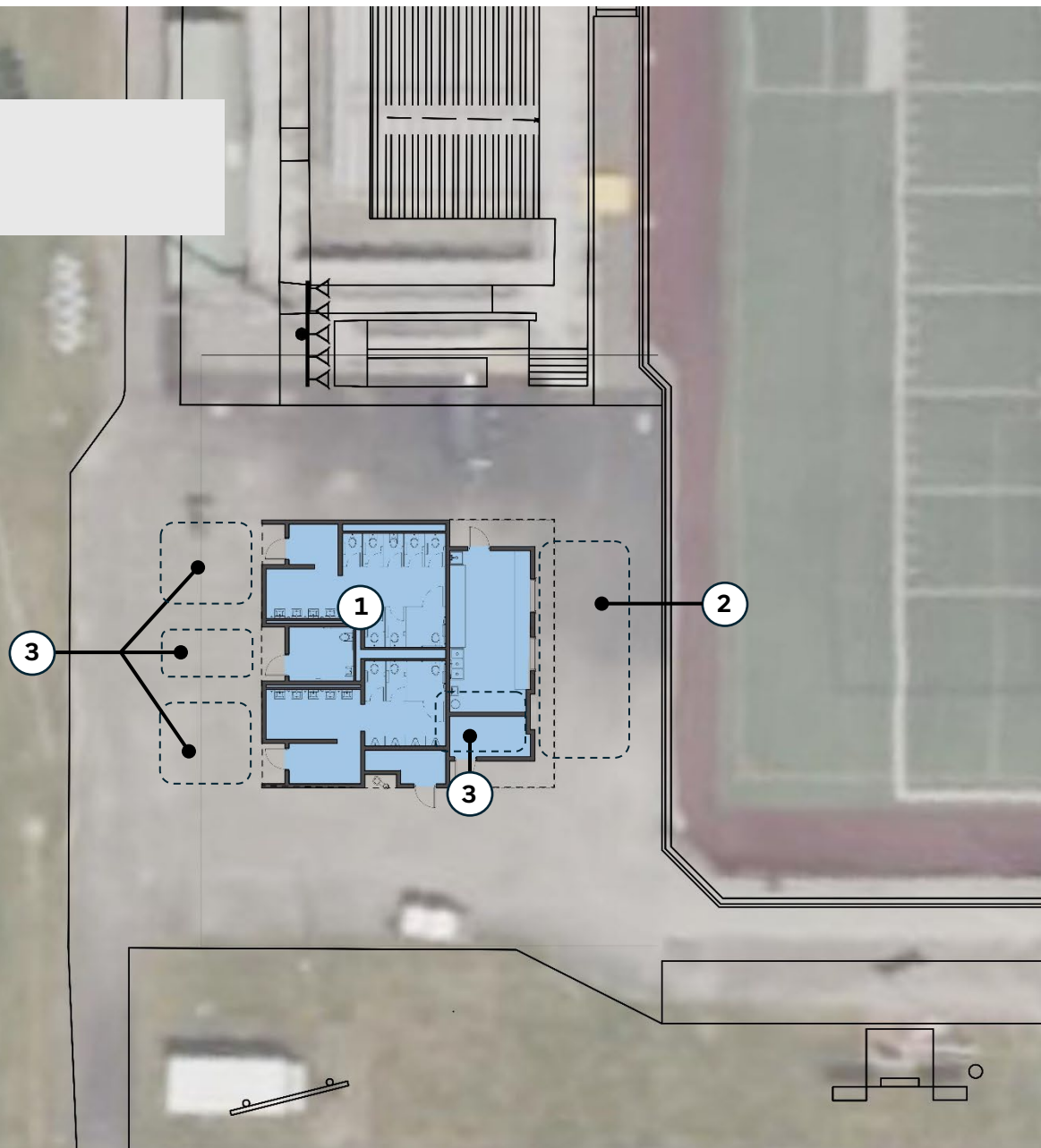


OPTION 3

Traditional design/bid/build

SITE PLAN

- ① BUILDING FOOTPRINT
- ② CONCESSIONS QUEUING
- ③ RESTROOM QUEUING



OPTION 3

Traditional design/bid/build

If this option is selected, the building look, materials and details will be developed and refined in the next design phase. As part of the interim study, the design team was asked to investigate the following alternates for Option 3.

OPTION 3A – Architectural Concrete Block, seasonal

- Single wythe concrete block walls
 - Decorative CMU exterior
 - Painted CMU interior
- Seasonal building
- Ventilation, no heat or AC

OPTION 3B – Wood Frame, seasonal

- Wood frame stud walls
 - Siding exterior
 - Tile / FRP panel /painted GWB interior
- Seasonal building
- Ventilation, no heat or AC

OPTION 3C – Wood Frame, year round

- Wood frame stud walls
 - Siding exterior
 - Tile / FRP panel /painted GWB interior
- Heat and AC – fully insulated (energy code)
 - **3C-1** Add Heating Only
 - **3C-2** Add Heating and Cooling



Architectural Concrete Block



Wood Frame / Siding



Wood Frame / Board + Batten

HVAC System Considerations

Seasonal Building:

The majority of secondary school amenities buildings are seasonal, designed with a plumbing system that can be drained and winterized. Late November games can be a challenge, however portable heaters are typically used to keep the building temperature from falling below freezing in late November.

Providing heat triggers the requirements of the stretch energy code. The primary challenge this presents is that it eliminates a single wythe CMU for the exterior wall. This simple system is commonly used due to its ability to provide a low-maintenance structure that can provide a durable interior and exterior wall finish in one system. The energy code's insulation requirements require a more complex wall system which increases the cost of these buildings. While heat certainly can make the building more comfortable, it is only needed for a short time during the outdoor sports season. Winterizing these buildings is still more energy efficient than conditioning year-round, even with the most efficient systems and thermal envelope.

In a seasonal building, a small heater is used to maintain 50°F in the water utility room. If conditioning the spaces is desired, and within the budget, CCHS can either provide heating alone or both heating and cooling as described here:

Seasonal Building:

- Exhaust ductwork from each space to a rooftop exhaust fan – 2,350 cfm.
- Louvers at each room to provide ventilation air and makeup the exhaust air.
- 3 kW unit heater for the utility room.
- Temporary space heaters can be used in November.
- Building drained down and winterized.

Add Heating Only:

- 2,350 cfm ERV with outside air and exhaust air ductwork to each space. Unit shall have a 50 kW heating coil.
- Supplemental 8 kW coil for the Concessions area.
- 3 kW unit heater for the utility room.
- Option to winterize or keep open.

Add Heating/Cooling:

- 2,350 cfm ERV with outside air and exhaust air ductwork to each space. Unit shall have a 35 kW heating coil.
- 3 kW unit heater for the utility room.
- 2 Ton Heat Pump type split unit for Concessions.
- 1.5 Ton Heat Pump type split unit for Men's Room.
- 1.5 Ton Heat Pump type split unit for Women's Room.
- Alternate to individual splits – 5 Ton Heat Pump type VRF system with 3 terminal units.
- Option to winterize or keep open.

Budgetary Cost Comparison



Option 1A:
Skid pre-fab units
with graphics

Estimated Cost:
\$445,000 – \$534,000

Advantages:

- Lower cost
- Shorter schedule
- Small upcharge for heat/AC
- Simple to winterize

Disadvantages:

- Requires AHJ approval as ‘permanent bldg.’
- +/- 10-year life-span
- MA plumbing code requires customization
- Look and feel
- No Concessions stand
- Multiple procurements /contractors



Option 1B:
Skid pre-fab units
with screening

Estimated Cost:
\$538,000 – \$646,000

Advantages:

- Lower cost
- Shorter schedule
- Small upcharge for heat/AC
- Simple to winterize
- Aesthetics can be improved through simple screening

Disadvantages:

- Requires AHJ approval as ‘permanent bldg.’
- +/- 10-year life-span
- MA plumbing code requires customization
- Look and feel
- No Concessions stand
- Multiple procurements /contractors



Option 2:
Modular Construction

Estimated Cost:
\$1,600,000 – \$1,900,000

Advantages:

- Provides full program
- Durability/Maintenance
- Duration of on-site construction shorter
- Many customization options

Disadvantages:

- MA plumbing code requires customization
- Multiple procurements /contractors
- Does not appear less expensive
- Long lead times possible
- Seasonal building (Thanksgiving game)



Option 3A:
CMU
design/bid/build

Estimated Cost:
\$1,550,000 – \$1,850,000

Advantages:

- Provides full program
- Overall design flexibility/aesthetics
- Durability/Maintenance
- Single source GC procurement/responsibility
- All elements will meet MA code/school standards

Disadvantages:

- Longer on-site construction schedule
- Seasonal building (Thanksgiving game)
- Can feel utilitarian



Option 3B:
Frame
design/bid/build

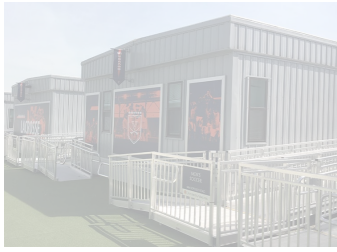
Estimated Cost:
\$1,420,000 – \$1,700,000

Advantages:

- Provides full program
- Overall design flexibility/aesthetics
- Less utilitarian feel
- Single source GC procurement/responsibility
- All elements will meet MA code/school standard

Disadvantages:

- Longer on-site construction schedule
- Seasonal building (Thanksgiving game)
- Less durable



Option 1A:
Skid pre-fab units
with graphics

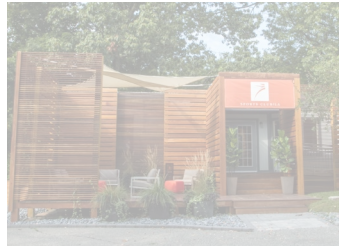
Estimated Cost:
\$445,000 - \$534,000

Advantages:

- Lower cost
- Shorter schedule
- Small upcharge for heat/AC
- Simple to winterize

Disadvantages:

- Requires AHJ approval as 'permanent bldg.'
- +/- 10 year life-span
- MA plumbing code requires customization
- Look and feel
- No Concession stand
- Multiple procurements /contractors



Option 1B:
Skid pre-fab units
with screening

Estimated Cost:
\$538,000 - 646,000

Advantages:

- Lower cost
- Shorter schedule
- Small upcharge for heat/AC
- Simple to winterize
- Aesthetics can be improved through simple screening

Disadvantages:

- Requires AHJ approval as 'permanent bldg.'
- +/- 10 year life-span
- MA plumbing code requires customization
- Look and feel
- No Concession stand
- Multiple procurements /contractors



Option 2:
Modular Construction

Estimated Cost:
\$1,600,000 - \$1,900,000

Advantages:

- Provides full program
- Durability/Maintenance
- Duration of on-site construction shorter
- Many customization options

Disadvantages:

- MA plumbing code requires customization
- Multiple procurements /contractors
- Does not appear less expensive
- Long lead times possible
- Seasonal building (Thanksgiving game)



Option 3A:
CMU
design/bid/build

Estimated Cost:
\$1,550,000 - \$1,850,000

Advantages:

- Provides full program
- Overall design flexibility/aesthetics
- Durability/Maintenance
- Single source GC procurement/responsibility
- All elements will meet MA code/school standards

Disadvantages:

- Longer on-site construction schedule
- Seasonal building (Thanksgiving game)
- Can feel utilitarian



Option 3B:
Frame
design/bid/build

Estimated Cost:
\$1,450,000 - \$1,750,000

Advantages:

- Provides full program
- Overall design flexibility/aesthetics
- Less utilitarian feel
- Single source GC procurement/responsibility
- All elements will meet MA code/school standard

Disadvantages:

- Longer on-site construction schedule
- Seasonal building (Thanksgiving game)
- Less durable

3C-1 heating add:
+ \$55,000 - \$65,000
3C-2 heating/AC add:
+ \$90,000 - \$105,000

Draft Schedule Comparison

Option 1A: SKID/TRAILER RESTROOMS with graphics/branding		2024					2025								
duration		Nov	Dec	Jan	Feb	Mar	Apr	May	June	Jul	Aug	Sept	Oct	Nov	
Foundation/site design - documentation	30 days														
Deck and screen design - documentation	30 days														
Bidding/foundation - Bidding/Procuring units	30 days														
Permitting	30 days														
Unit Manufacture worst case (lead time can vary significantly)	60-120 days														
Foundation Construction/utilities:	45 days														
Unit Delivery install (includes utility connections)	15 days														
Deck, ramp, stair construction	30 days														

Option 1B: SKID/TRAILER RESTROOMS with graphics/branding + screens		2024					2025								
duration		Nov	Dec	Jan	Feb	Mar	Apr	May	June	Jul	Aug	Sept	Oct	Nov	
Foundation/site design - documentation	30 days														
Deck and screen design - documentation	30 days														
Bidding/foundation - Bidding/Procuring units	30 days														
Permitting	30 days														
Unit Manufacture worst case (lead time)	200 days														
Foundation Construction/utilities:	45 days														
Unit Delivery install (includes utility connections)	15 days														
Deck, ramp, stair, screen construction	45 days														

Option 2: MODULAR RESTROOMS		2024					2025								
duration		Nov	Dec	Jan	Feb	Mar	Apr	May	June	Jul	Aug	Sept	Oct	Nov	
Bidding/Procurement Modular building Manufacturer	30 days														
Modular Building design customization	30 days														
Foundation/site design (owners engineers)	45 days														
Permitting	30 days														
Modular Building Manufacture (NTP + approved architectural submittal)	240 days														
Bidding: site/foundations contractor	30 days														
Foundation Construction/utilities	45 days														
Modular Delivery Install	15 days														
Final utility connections	15 days														

Option 3A + 3B: DESIGN/BID/BUILD CMU or frame w/ siding		2024					2025								
duration		Nov	Dec	Jan	Feb	Mar	Apr	May	June	Jul	Aug	Sept	Oct	Nov	
Building/Site Design	90 days														
Bidding	30 days														
Permitting	30 days														
Construction	180 days														

Option 3C-1 + 3C-2: DESIGN/BID/BUILD frame w/ siding - heat, cooling		2024					2025								
duration		Nov	Dec	Jan	Feb	Mar	Apr	May	June	Jul	Aug	Sept	Oct	Nov	
Building/Site Design	90 days														
Bidding	30 days														
Permitting	30 days														
Construction	210 days														

Composting Toilet Analysis

Under the Title 5 Regulations (310 CMR 15.000), MassDEP must approve an innovative/alternative septic-system technology before it can be used in Massachusetts. General Use systems must provide a level of environmental protection at least equivalent to that of a conventional on-site system designed in accordance with Title 5. Since a composting toilet is a plumbing fixture, the Board of Registration of Plumbers and Gas Fitters must also approve the units.

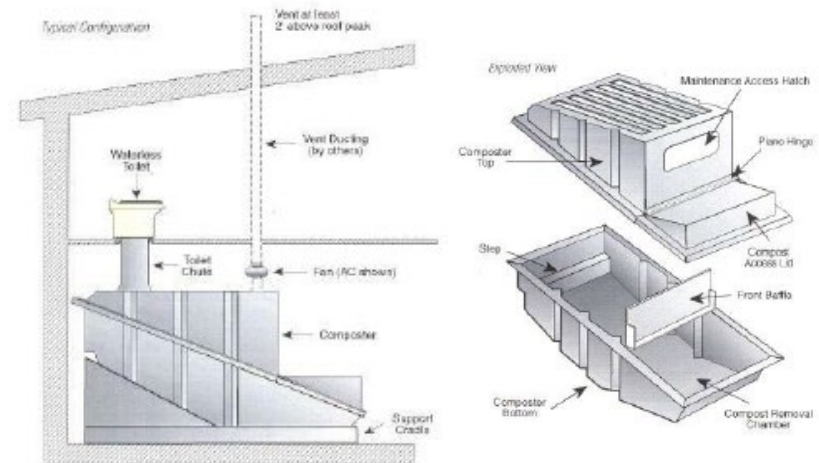
Based on our team's research and experience, the list of approved units only includes one system (Clivus Multrum) that would be appropriate for this application. Our team has experience with a successful installation of this system. However, it was only used on two second-floor toilets, due to the way in which the system works.

This system uses gravity to drain toilets to a tank below. The tank processes the waste, and the treated effluent is then pumped into the sanitary system. The tanks would require a full basement with an access bulkhead under the building to house the area needed for the tanks. The largest tanks available would likely only serve 2-3 toilets and have a footprint of 6'x9'.

The composting system is fairly low maintenance but additional building systems are needed to keep it operating efficiently. These include:

- A moistening system feeding the tanks
- Effluent removal pump system
- Dedicated ventilation system
- Fire suppression system (ABC dry chemical)

System diagram:



Composting Toilet Analysis

Budgetary Cost:

Additional cost for basement: \$90,000

Additional cost for composting system: \$190,000

Total estimated added cost: \$280,000



Basement for Composting Tanks





Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

2

Open Public Hearing – Fiscal Year 2025 Tax Classification

Requested by: SB Chair

Action Sought: Open Public Hearing

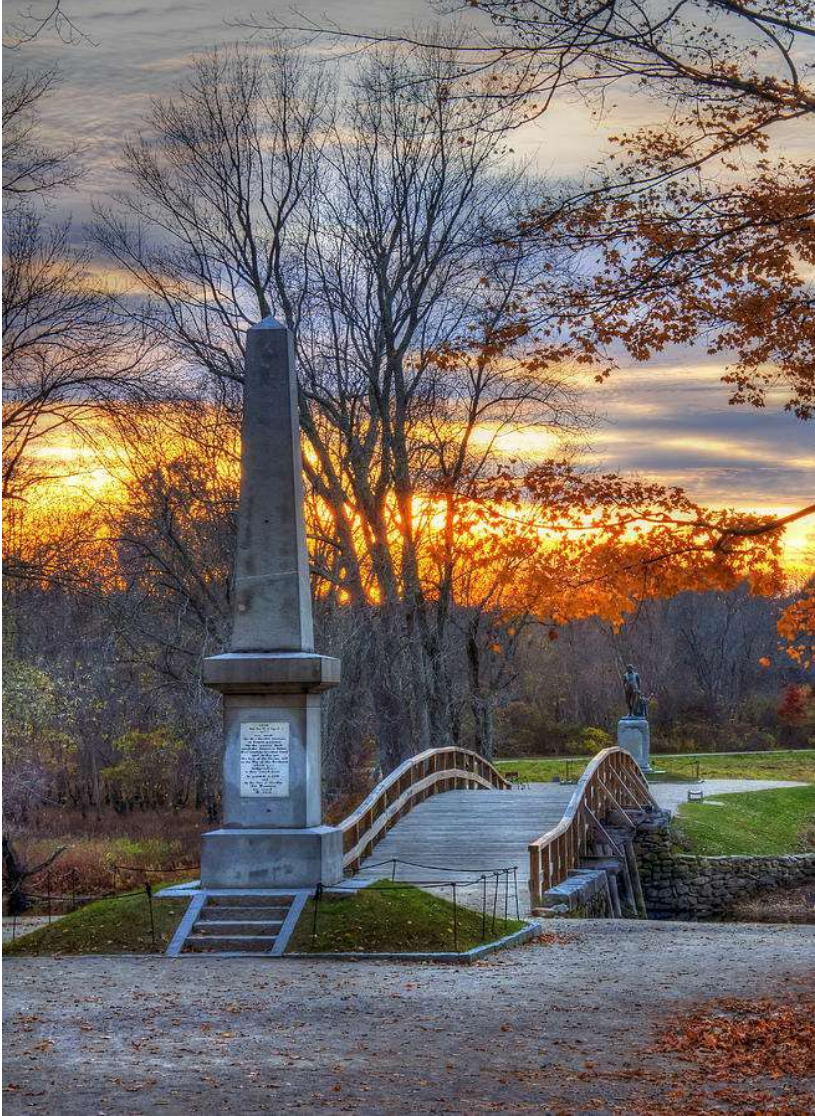
Proposed Motion(s)

Open Public Hearing: Fiscal Year 2025 Tax Classification

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



Fiscal Year 2025

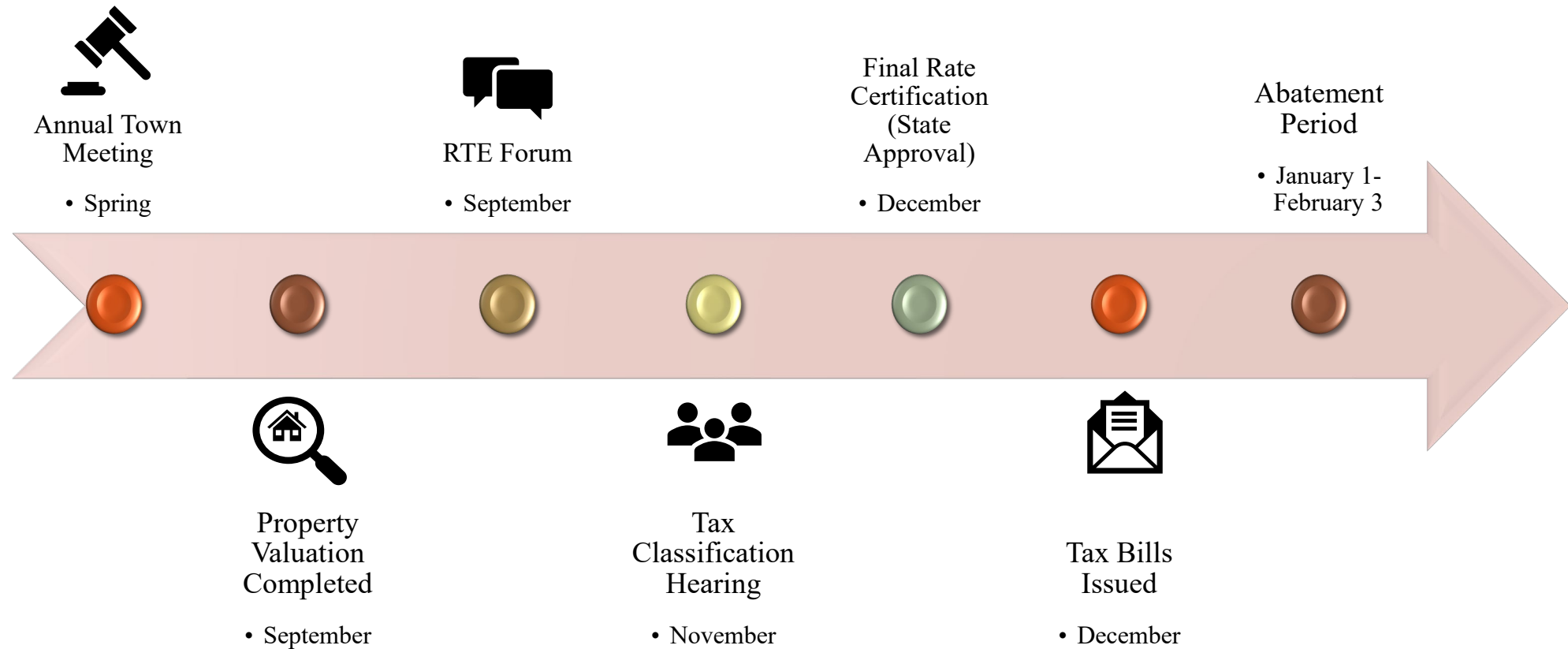
TAX RATE CLASSIFICATION HEARING

**A REVIEW OF THE FISCAL YEAR 2025
PROPERTY TAX LEVY AND CLASSIFICATION
OPTIONS.**

TOWN OF CONCORD

NOVEMBER 18, 2024

Timeline



Purpose of Tax Classification Hearing

- To determine whether to distribute the tax levy equally among all classes of property.



Or



- To reduce the share of the levy by the residential classes and shift some of the burden to the Commercial, Industrial and Personal Property Classes.

Select Board's Role

The Select Board will consider four key decisions for tax classification:

Vote: Selection of a Minimum Residential Factor, Single or Split Tax Rate

Vote: Whether to Grant an Open Space Discount


Vote: Whether to Adopt a Residential Exemption

Vote: Whether to Adopt a Small Commercial Exemption


Selection of a Minimum Residential Factor, Single or Split Tax Rate



Selection of an Open Space Discount-or not



Granting of a Residential Exemption or not



Granting of a Small Commercial Exemption or not

CERTIFIED VALUES—FISCAL YEAR 2025

BLA-LA13A : FORM APPROVED

CONCORD - 067 2025

Jurisdiction Fiscal Year

Property Type	Parcel Count	Class1 Residential	Class2 Open Space	Class3 Commercial	Class4 Industrial	Class5 Pers Prop
101	4,628	7,318,881,900				
102	914	679,632,361				
MISC 103,109	54	161,761,800				
104	90	86,515,200				
105	1	1,441,400				
111-125	27	276,602,900				
130-32,106	273	52,906,112				
200-231	0		0			
300-393	323			475,005,000		
400-442	27				26,554,800	
450-452	2				3,430,404	
CH 61 LAND	4 12		0	48,470		
CH 61A LAND	26 20		0	1,143,159		
CH 61B LAND	22 8		0	9,329,005		
012-043	25	163,356,306	0	48,443,429	0	
501	119					8,702,780
502	135					22,032,380
503	0					0
504	2					31,146,640
505	3					8,087,100
506	1					3,152,800
508	3					1,542,690
550-552	0					0
TOTALS	6,719	8,741,097,979	0	533,969,063	29,985,204	74,664,390
Real and Personal Property Total Value						9,379,716,636
Exempt Parcel Count & Value				645		1,152,658,000

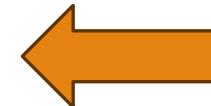
* See Addendum #1 for historical data regarding Town Levy

**PROPOSED TAX RATE =
LEVY/CERTIFIED VALUES**

\$116,237,779 (LEVY)
9,379,716,636 (VALUES)

Single Tax Rate = \$12.39

IF A FACTOR OF 1 IS SELECTED
(NO SHIFT)



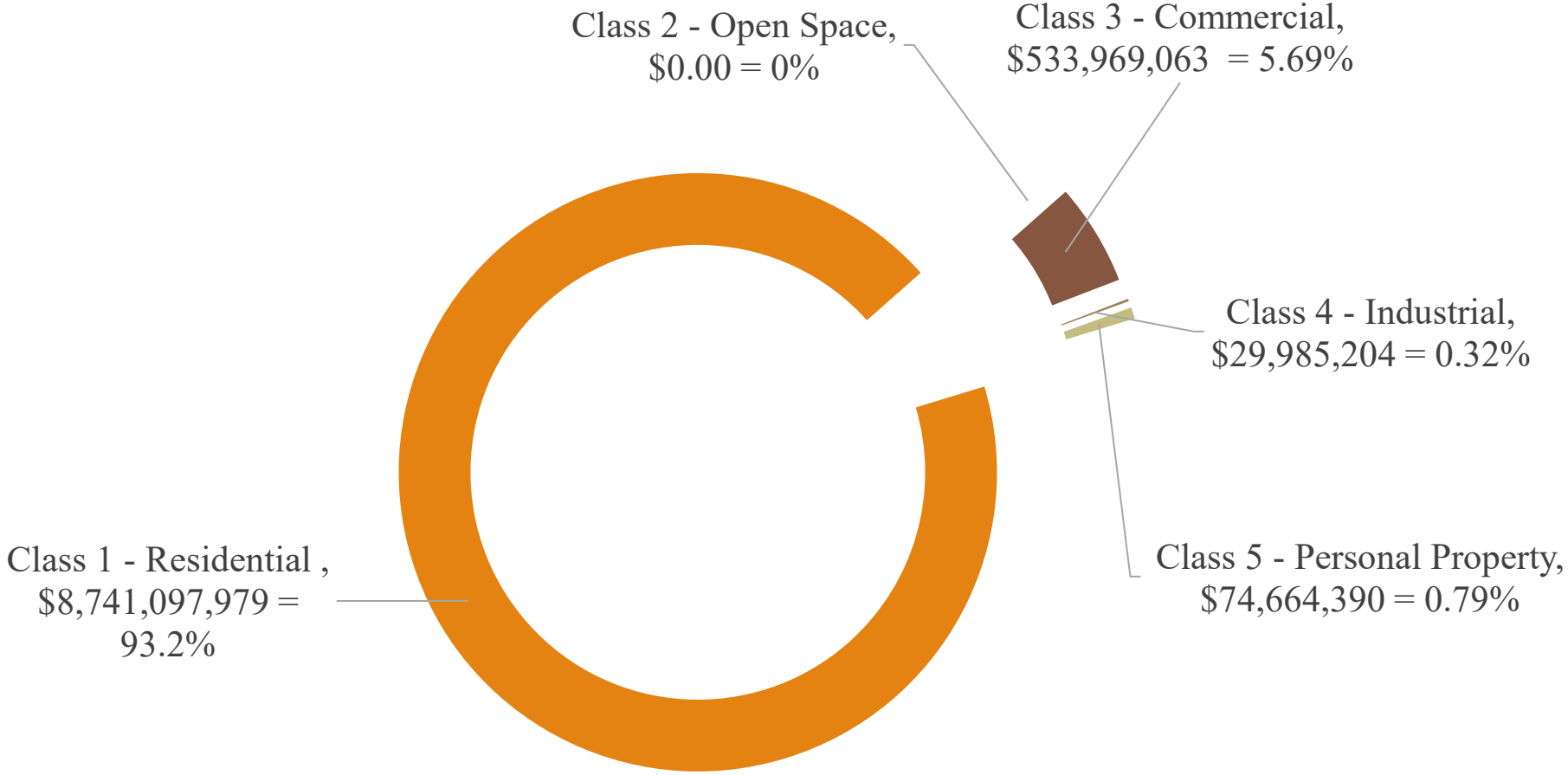
Tax Rate Calculation

Single Rate, with no shift, the Tax Rate would be \$12.39/\$1,000 of assessed value

$$\begin{array}{l}
 \text{FY2025 Property Tax Levy} \\
 \text{Town Taxable Valuation}
 \end{array}
 \begin{array}{l}
 \mathbf{\$116,237,779} \\
 \mathbf{\$9,379,716,636}
 \end{array}
 =
 \begin{array}{l}
 \mathbf{\$12.39 \text{ per thousand dollars of}} \\
 \mathbf{\text{assessed value}}
 \end{array}$$

	<u>FY24</u>	<u>RE Taxes</u>	<u>FY25</u>	<u>RE Taxes</u>
Average Assessed Value 101-Single Family:	\$ 1,554,227.00	\$ 20,407.00	\$1,581,435.00	\$ 19,593.98
Median Assessed Value 101-Single Family	\$ 1,303,250.00	\$ 17,111.67	\$1,331,300.00	\$ 16,494.81
Average Assessed Value 102-Condominium	\$ 731,154.00	\$ 9,600.05	\$743,580.00	\$ 9,212.96
Median Assessed Value 102-Condominium	\$ 629,950.00	\$ 8,271.24	\$639,587.00	\$ 7,924.48

Breakdown of Taxable Property Classes



VOTE 1

**SELECTION OF A MINIMUM RESIDENTIAL
FACTOR, SINGLE OR SPLIT TAX RATE**

What is a Split Tax Rate?



Communities decide to tax Residential, Commercial, Industrial & Personal Property (CIP) differently.



Statute allows an increase in CIP's share of the tax levy up to 50% higher than Residential



Does not generate new revenue; reallocates levy burden



Concord has used a single tax rate since 1998

Minimum Residential Factor Comparison

Class	Value	%	
Residential	8,741,097,979	93.1915	RO %
Open Space	0	0.0000	93.1915
Commercial	533,969,063	5.6928	
Industrial	29,985,204	0.3197	CIP %
Personal Property	74,664,390	0.7960	6.8085
Total	9,379,716,636	100.0000	

ENTER A LEVY (ESTIMATED IF NECESSARY)

Levy	116,237,779
Single Tax Rate	12.39

Estimated Tax Rates with CIP Shift from 1.0-1.50

CIP Shift	Res Factor	Share Percentages						Levy Amounts					Estimated Tax Rates				
		Res SP	OS SP	Comm SP	Ind SP	PP SP	Total SP	Res LA	OS LA	Comm LA	Ind LA	PP LA	Total LA	Res ET	OS ET	Comm ET	Ind ET
1.0000	1.0000	93.1915	0.0000	5.6928	0.3197	0.7960	100.0000	108,323,730	6,617,184	371,612	925,253	116,237,779	12.39	0.00	12.39	12.39	12.39
1.1000	0.9920	92.4426	0.0000	6.3190	0.3549	0.8836	100.0000	107,453,183	7,345,075	412,490	1,027,031	116,237,778	12.29	0.00	13.76	13.76	13.76
1.2090	0.9847	91.7685	0.0000	6.8826	0.3865	0.9624	100.0000	106,669,692	8,000,176	449,279	1,118,631	116,237,777	12.20	0.00	14.98	14.98	14.98
1.3080	0.9775	91.0945	0.0000	7.4462	0.4182	1.0412	100.0000	105,886,200	8,655,277	486,069	1,210,231	116,237,776	12.11	0.00	16.21	16.21	16.21
1.4070	0.9703	90.4204	0.0000	8.0098	0.4498	1.1200	100.0000	105,102,708	9,310,378	522,858	1,301,831	116,237,775	12.02	0.00	17.44	17.44	17.44
1.5000	0.9638	89.8213	0.0000	8.5107	0.4780	1.1900	100.0000	104,406,271	9,892,691	555,560	1,383,253	116,237,775	11.94	0.00	18.53	18.53	18.53

Since 1998 the Town has not shifted the tax burden to Commercial, Industrial, and Personal Property (CIP).

VOTE 2

WHETHER TO GRANT AN OPEN SPACE DISCOUNT

OPEN SPACE DISCOUNT

During the State mandated Classification Hearing, the Select Board must vote on the following in order to establish a tax rate:

OPEN SPACE DISCOUNT:

Open space is land maintained in an open or natural condition which contributes significantly to the benefit and enjoyment of the public and which is not

Subject to a permanent conservation restriction;

Held for the production of income;

Taxable under the provisions of

- Chapter 61 (Forestry Land)
- Chapter 61A (Agricultural/Horticultural Land)
- Chapter 61B (Recreational Land).

The Select Board may discount up to 25% of the Open Space share of taxes.

Historically, the Town of Concord has not adopted an Open Space Discount.

VOTE 3

WHETHER TO ADOPT A RESIDENTIAL EXEMPTION

What Is It?

MGL c.59, sec. 5C

Enacted in 1979, the **Residential Tax Exemption** is an option under property tax classification MGL c.59, sec. 5C that shifts the tax burden within the residential class from owners of moderately valued residential properties to the owners of vacation homes, higher valued homes and residential properties not occupied by the owner, including apartments and vacant land.

Residential Tax Exemption

- The Residential Exemption Factor can be 1% up to 35% of the total **average** residential parcel value
- The property must be the "**primary domicile**" of the owner as used for income tax purposes
- This option exempts value **only within** the Residential Class of property & **does not change the levy amount or impact Commercial, Industrial, or Personal (CIP) Property**
- The Select Board can authorize up to a 35% Residential Exemption.
- 18 communities, out of 351 in MA, chose to adopt in FY23-FY25.
- The Residential Exemption is a fixed value reduction off the assessment for qualified taxpayers, meaning all qualified taxpayers receive the same amount subtracted from their assessed value.
- The assessed value for the exemption is a percentage of the average residential value of the community.

Community	Percentage
Barnstable	25 [^]
Boston	35
Brookline	20
Cambridge	30
Chelsea	35
Concord	10
Everett	25
Malden	30
Mashpee	5
Nantucket	25
Oak Bluffs	15 [^]
Provincetown	35
Somerville	35
Tisbury	22
Truro	30 [^]
Waltham	35
Watertown	33
Wellfleet	30 [^]

* [^] Indicates RTE percentage increased for FY2025

How Is It Calculated?

A = Total Residential Value = \$8,741,097,979

B = Total Residential Parcel Count = **6056**

C = Average Residential Value = \$1,443,378.00

D = Selected Residential Exemption % = 10%

E = Residential Exemption = \$144,338.00

F = Number of qualifying Residential Parcels = **3,870**

G = Total Residential Exemption Value = \$558,588,060

H = Total Residential Value-Exemption = \$8,182,509,919

Break Even Point A divided By F = \$2,258,682.00

Fiscal Year 2025 Real Estate Tax Impact of Residential Tax Exemption (RTE)															
Non-RTE Qualifying Residential Property Tax								RTE Qualifying Residential Property Tax							
		Value	Rate w/o RTE	Estimated Bill w/o RTE	Rate w/ RTE	Estimated Bill w/ RTE	*Variance (Increase)		Value	Rate w/o RTE	Estimated Bill w/o RTE	Taxable Value w/ RTE	Rate w/ RTE	Estimated Bill w/ RTE	*Variance (Savings)
5% RTE	\$72,169	500,000	12.39	6,195	12.80	6,400	205		500,000	12.39	6,195	427,831	12.80	5,476	-719
		750,000	12.39	9,293	12.80	9,600	308		750,000	12.39	9,293	677,831	12.80	8,676	-616
		1,000,000	12.39	12,390	12.80	12,800	410		1,000,000	12.39	12,390	927,831	12.80	11,876	-514
		1,500,000	12.39	18,585	12.80	19,200	615		1,500,000	12.39	18,585	1,427,831	12.80	18,276	-309
		1,800,000	12.39	22,302	12.80	23,040	738		1,800,000	12.39	22,302	1,727,831	12.80	22,116	-186
		2,000,000	12.39	24,780	12.80	25,600	820		2,000,000	12.39	24,780	1,927,831	12.80	24,676	-104
		2,258,682	12.39	27,985	12.80	28,911	926		2,258,682	12.39	27,985	2,186,513	12.80	27,987	2
		2,500,000	12.39	30,975	12.80	32,000	1,025		2,500,000	12.39	30,975	2,427,831	12.80	31,076	101
		3,000,000	12.39	37,170	12.80	38,400	1,230		3,000,000	12.39	37,170	2,927,831	12.80	37,476	306
		3,500,000	12.39	43,365	12.80	44,800	1,435		3,500,000	12.39	43,365	3,427,831	12.80	43,876	511
		4,000,000	12.39	49,560	12.80	51,200	1,640		4,000,000	12.39	49,560	3,927,831	12.80	50,276	716
		4,500,000	12.39	55,755	12.80	57,600	1,845		4,500,000	12.39	55,755	4,427,831	12.80	56,676	921
		5,000,000	12.39	61,950	12.80	64,000	2,050		5,000,000	12.39	61,950	4,927,831	12.80	63,076	1,126
		5,500,000	12.39	68,145	12.80	70,400	2,255		5,500,000	12.39	68,145	5,427,831	12.80	69,476	1,331
		6,000,000	12.39	74,340	12.80	76,800	2,460		6,000,000	12.39	74,340	5,927,831	12.80	75,876	1,536
* Difference between taxes without RTE and taxes with RTE								~ \$2.3M is the value where taxes will be increased even if the exemption is received							
NOTE: ALL TAX RATES ARE APPROXIMATE PENDING DOR APPROVAL															

Fiscal Year 2025 Real Estate Tax Impact of Residential Tax Exemption (RTE)															
Non-RTE Qualifying Residential Property Tax								RTE Qualifying Residential Property Tax							
		Value	Rate w/o RTE	Estimated Bill w/o RTE	Rate w/ RTE	Estimated Bill w/ RTE	*Variance (Increase)		Value	Rate w/o RTE	Estimated Bill w/o RTE	Taxable Value w/ RTE	Rate w/ RTE	Estimated Bill w/ RTE	*Variance (Savings)
10% RTE	\$144,338	500,000	12.39	6,195	13.24	6,620	425		500,000	12.39	6,195	355,662	13.24	4,709	-1,486
		750,000	12.39	9,293	13.24	9,930	638		750,000	12.39	9,293	605,662	13.24	8,019	-1,274
		1,000,000	12.39	12,390	13.24	13,240	850		1,000,000	12.39	12,390	855,662	13.24	11,329	-1,061
		1,500,000	12.39	18,585	13.24	19,860	1,275		1,500,000	12.39	18,585	1,355,662	13.24	17,949	-636
		1,800,000	12.39	22,302	13.24	23,832	1,530		1,800,000	12.39	22,302	1,655,662	13.24	21,921	-381
		2,000,000	12.39	24,780	13.24	26,480	1,700		2,000,000	12.39	24,780	1,855,662	13.24	24,569	-211
		2,258,682	12.39	27,985	13.24	29,905	1,920		2,258,682	12.39	27,985	2,114,344	13.24	27,994	9
		2,500,000	12.39	30,975	13.24	33,100	2,125		2,500,000	12.39	30,975	2,355,662	13.24	31,189	214
		3,000,000	12.39	37,170	13.24	39,720	2,550		3,000,000	12.39	37,170	2,855,662	13.24	37,809	639
		3,500,000	12.39	43,365	13.24	46,340	2,975		3,500,000	12.39	43,365	3,355,662	13.24	44,429	1,064
		4,000,000	12.39	49,560	13.24	52,960	3,400		4,000,000	12.39	49,560	3,855,662	13.24	51,049	1,489
		4,500,000	12.39	55,755	13.24	59,580	3,825		4,500,000	12.39	55,755	4,355,662	13.24	57,669	1,914
		5,000,000	12.39	61,950	13.24	66,200	4,250		5,000,000	12.39	61,950	4,855,662	13.24	64,289	2,339
		5,500,000	12.39	68,145	13.24	72,820	4,675		5,500,000	12.39	68,145	5,355,662	13.24	70,909	2,764
		6,000,000	12.39	74,340	13.24	79,440	5,100		6,000,000	12.39	74,340	5,855,662	13.24	77,529	3,189
* Difference between taxes without RTE and taxes with RTE								~ \$2.3M is the value where taxes will be increased even if the exemption is received							
NOTE: ALL TAX RATES ARE APPROXIMATE PENDING DOR APPROVAL															

Fiscal Year 2025 Real Estate Tax Impact of Residential Tax Exemption (RTE)															
Non-RTE Qualifying Residential Property Tax								RTE Qualifying Residential Property Tax							
		Value	Rate w/o RTE	Estimate d Bill w/o RTE	Rate w/ RTE	Estimate d Bill w/ RTE	*Variance (Increase)		Value	Rate w/o RTE	Estimate d Bill w/o RTE	Taxable Value w/ RTE	Rate w/ RTE	Estimated Bill w/ RTE	*Variance (Savings)
15% RTE	\$216,507	500,000	12.39	6,195	13.71	6,855	660		500,000	12.39	6,195	283,493	13.71	3,887	-2,308
		750,000	12.39	9,293	13.71	10,283	990		750,000	12.39	9,293	533,493	13.71	7,314	-1,978
		1,000,000	12.39	12,390	13.71	13,710	1,320		1,000,000	12.39	12,390	783,493	13.71	10,742	-1,648
		1,500,000	12.39	18,585	13.71	20,565	1,980		1,500,000	12.39	18,585	1,283,493	13.71	17,597	-988
		1,800,000	12.39	22,302	13.71	24,678	2,376		1,800,000	12.39	22,302	1,583,493	13.71	21,710	-592
		2,000,000	12.39	24,780	13.71	27,420	2,640		2,000,000	12.39	24,780	1,783,493	13.71	24,452	-328
		2,258,682	12.39	27,985	13.71	30,967	2,981		2,258,682	12.39	27,985	2,042,175	13.71	27,998	13
		2,500,000	12.39	30,975	13.71	34,275	3,300		2,500,000	12.39	30,975	2,283,493	13.71	31,307	332
		3,000,000	12.39	37,170	13.71	41,130	3,960		3,000,000	12.39	37,170	2,783,493	13.71	38,162	992
		3,500,000	12.39	43,365	13.71	47,985	4,620		3,500,000	12.39	43,365	3,283,493	13.71	45,017	1,652
		4,000,000	12.39	49,560	13.71	54,840	5,280		4,000,000	12.39	49,560	3,783,493	13.71	51,872	2,312
		4,500,000	12.39	55,755	13.71	61,695	5,940		4,500,000	12.39	55,755	4,283,493	13.71	58,727	2,972
		5,000,000	12.39	61,950	13.71	68,550	6,600		5,000,000	12.39	61,950	4,783,493	13.71	65,582	3,632
		5,500,000	12.39	68,145	13.71	75,405	7,260		5,500,000	12.39	68,145	5,283,493	13.71	72,437	4,292
		6,000,000	12.39	74,340	13.71	82,260	7,920		6,000,000	12.39	74,340	5,783,493	13.71	79,292	4,952
* Difference between taxes without RTE and taxes with RTE							~ \$2.3M is the value where taxes will be increased even if the exemption is received								
NOTE: ALL TAX RATES ARE APPROXIMATE PENDING DOR APPROVAL															

Options for Residential Exemption

(Example Calculation of 10%)

A. Total Residential Value	\$8,741,097,979
B. Total Residential Parcels	6056
C. Average Residential Value	\$ 1,443,378
D. Exemption %	10%
E. Exemption Amount	\$ 144,338.00
F. Number of Eligible (est)	3870
G. Total Residential Exemption	\$ 558,588,060
H. Residential Value less Exemp	\$8,182,509,919
I. Break Even	\$ 2,258,682

<u>EX. %</u>		<u>AVG RES. VALUE</u>		<u>EX. AMOUNT</u>	<u>TAX RATE</u>
5%	X	\$1,443,378.00	=	\$ 72,169	12.80
10%	X	\$1,443,378.00	=	\$ 144,338	13.24
15%	X	\$1,443,378.00	=	\$ 216,507	13.71
20%	X	\$1,443,378.00	=	\$ 288,676	14.21
25%	X	\$1,443,378.00	=	\$ 360,845	14.75
30%	X	\$1,443,378.00	=	\$ 433,013	15.33
35%	X	\$1,443,378.00	=	\$ 519,616	16.10

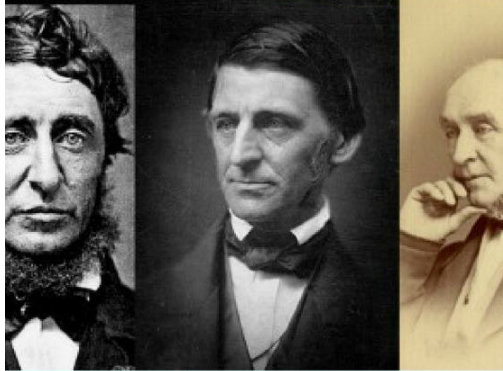
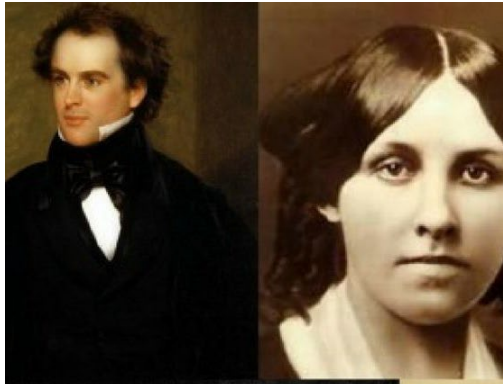
VOTE 4

WHETHER TO ADOPT A SMALL COMMERCIAL EXEMPTION

SMALL COMMERCIAL EXEMPTION

- Council could adopt an exemption that reduces the taxable valuation by up to 10% of eligible Commercial parcels only.
- Eligible businesses must have an average annual employment of **not more than 10 people** during the previous calendar year.
- Assessed value of the parcel occupied by eligible business must be **\$1 million or less**.
- In order for a commercial parcel to qualify, every business occupying the parcel must also qualify for the exemption.
- This exemption shifts the tax burden within the CIP Classes from small commercial properties to larger commercial and industrial parcels.
- Increases the Commercial/Industrial/Personal Property Tax Rate.
- The exemption goes to the building owner, not the business owner, so depending on lease agreements, a small business owner may or may not benefit.

Concord has not historically adopted this exemption



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THE CONCORD WRITERS

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Town of Concord

Board of Assessors

Dr. Mera Tilley, Chair

Yannis Tsitsas, Vice Chair

Brendan Kemeza

Arry Charles

Shriram Bharath

Assessing Division

Meredith Stone- Town Assessor

Michael Gibbons-Assistant Town Assessor

Carolyn Dee-Office Administrator

Lee Phalen-Data Lister

Samantha Perry-Administrative Specialist

ADDENDA

ADDENDUM #1—Historical Levy Data

ADDENDUM #2—Classification Hearing Terms

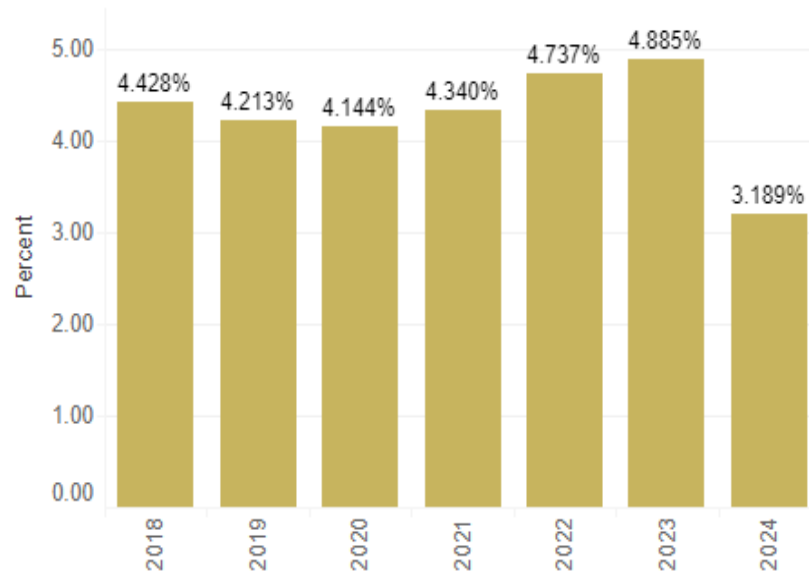
ADDENDUM #3—LA-4 Comparison FY24 to FY25

ADDENDUM #1

History of Town Levy 2018-Present

Concord

Excess Levy Capacity as % of Max Levy



Excess Levy Capacity is the difference between the levy limit and the amount of real and personal property taxes actually levied in a given year. Annually, the board of selectmen or city council must be informed of excess levy capacity and their acknowledgment must be submitted to DOR when setting the tax rate.

Property Tax Levy Data

Levy Data	2018	2019	2020	2021	2022	2023	2024
Maximum Levy	91,875,014	95,307,264	99,149,414	102,580,714	105,774,848	110,170,315	116,503,661
Levy Limit w/o Exclusions	85,491,022	88,864,251	92,281,116	95,545,971	98,905,503	102,619,655	106,213,177
Total Tax Levy	87,807,057	91,291,587	95,040,945	98,128,300	100,764,774	104,788,383	112,788,698
Excess Levy Capacity	4,067,957	4,015,677	4,108,469	4,452,414	5,010,074	5,381,932	3,714,963

Data appearing in this dashboard includes information extracted from the DLS Gateway database on 9/5/2023, based on data submitted to DLS by municipalities as part of the annual tax rate setting process. Excess Levy Capacity as % of Max Levy will be displayed as 0% if the value is less than 0.001%.

FY25 PROJECTED LEVY \$116,237,779

ADDENDUM #2

CLASSIFICATION HEARING TERMS

CIP - Commercial, Industrial, and Personal Property Classes

Levy - the revenue a community can raise through real and personal property taxes.

Levy Limit - The maximum amount a community can levy in a given year; equal to last year's levy plus 2.5% plus new growth plus debt exclusion / override if applicable.

Levy Ceiling - Equal to 2.5% of the total full and fair cash value of all taxable real and personal property in the community.

New Growth - Increase in the tax base due to new construction, parcel subdivisions, condo conversions and property renovations, but not due to revaluation. It is calculated by dividing the resulting increased assessed value by \$1,000 and multiplying by the prior year's tax rate for the property class.

Override - A permanent increase to a community's levy limit.

Override Capacity - The difference between the levy ceiling and the levy limit. It is the maximum amount by which a community may override its levy limit.

Debt Exclusion - A temporary increase to the levy limit for the payment of a specific debt service item over a specified period of time.

Capital Outlay Expenditure - A temporary exclusion for the purpose of raising funds for capital projects.

Excess Levy Capacity - The difference between the actual levy and the levy limit.

ADDENDUM #3

Property Type	Description	FY 2024 Mix Use Parcel Count	FY 2024 Parcel Count	FY 2024 Assessed Value	FY 2025 Mix Use Parcel Count	FY 2025 Parcel Count	FY 2025 Assessed Value	Parcel Dif	Parcel % Dif	Assessed Value Dif	Assessed Value % Dif
101	Single Family		4,623	7,185,189,700		4,628	7,318,881,900	5	0.1%	133,692,200	1.9%
102	Condominiums		902	659,500,600		914	679,632,361	12	1.3%	20,131,761	3.1%
MISC 103,109	Miscellaneous Residential		54	161,726,200		54	161,761,800	0		35,600	0.0%
104	Two - Family		93	88,639,050		90	86,515,200	-3	-3.2%	-2,123,850	-2.4%
105	Three - Family		1	1,384,700		1	1,441,400	0		56,700	4.1%
111-125	Apartment		27	268,994,700		27	276,602,900	0		7,608,200	2.8%
130-32,106	Vacant / Accessory Land		277	54,863,012		273	52,906,112	-4	-1.4%	-1,956,900	-3.6%
200-231	Open Space		0	0		0	0	0		0	
300-393	Commercial		322	468,626,800		323	475,005,000	1	0.3%	6,378,200	1.4%
400-442	Industrial		27	26,128,200		27	26,554,800	0		426,600	1.6%
450-452	Industrial Power Plant		2	3,430,404		2	3,430,404	0		0	
CH 61 LAND	Forest	4	12	60,981	4	12	48,470	0		-12,511	-20.5%
CH 61A LAND	Agriculture	26	20	1,119,411	26	20	1,143,159	0		23,748	2.1%
CH 61B LAND	Recreational	22	8	9,309,210	22	8	9,329,005	0		19,795	0.2%
012-043	Multi-use - Residential		27	163,691,552		25	163,356,306	-2	-7.4%	-335,246	-0.2%
012-043	Multi-use - Open Space		0	0		0	0	0		0	
012-043	Multi-use - Commercial		0	49,059,993		0	48,443,429	0		-616,564	-1.3%
012-043	Multi-use - Industrial		0	0		0	0	0		0	
501	Individuals / Partnerships / Associations / Trusts / LLC		122	7,077,620		119	8,702,780	-3	-2.5%	1,625,160	23.0%
502	Corporations		135	20,035,060		135	22,032,380	0		1,997,320	10.0%
503	Manufacturing		0	0		0	0	0		0	
504	Public Utilities		2	31,255,340		2	31,146,640	0		-108,700	-0.3%
505	Centrally Valued Telephone		3	7,925,300		3	8,087,100	0		161,800	2.0%
506	Centrally Valued Pipelines		1	3,038,500		1	3,152,800	0		114,300	3.8%
508	Wireless Telephone		3	1,725,050		3	1,542,690	0		-182,360	-10.6%
550-552	Electric Generating Plant		0	0		0	0	0		0	
EXEMPT VALUE	Exempt Property		645	1,126,356,400		645	1,152,658,000	0		26,301,600	2.3%
Total Class 1	TOTAL RESIDENTIAL		6,004	8,583,989,514		6,012	8,741,097,979	8	0.1%	157,108,465	1.8%
Total Class 2	TOTAL OPEN SPACE		0	0		0	0	0		0	
Total Class 3	TOTAL COMMERCIAL		414	528,176,395		415	533,969,063	1	0.2%	5,792,668	1.1%
Total Class 4	TOTAL INDUSTRIAL		29	29,558,604		29	29,985,204	0		426,600	1.4%
Total Class 5	TOTAL PERSONAL PROPERTY		266	71,056,870		263	74,664,390	-3	-1.1%	3,607,520	5.1%
Total Taxable	TOTAL REAL & PERSONAL		6,713	9,212,781,383		6,719	9,379,716,636	6	0.1%	166,935,253	1.8%

To: Concord Select Board
From: Concord Municipal Affordable Housing Trust c/o chair Keith Bergman
Date: November 14, 2024
SUBJ: FY 2025 Tax Classification Hearing – Residential Tax Exemption

Please accept this letter for the Select Board’s November 18, 2024 property tax rate classification hearing. At its meeting on October 29, 2024, the Concord Municipal Affordable Housing Trust voted (4-0-2)¹ to support continuation of the 10% residential tax exemption for FY 2025.

The Trust was established pursuant to votes of the 2019 and 2020 Annual Town Meetings to provide for the preservation and creation of affordable housing in Concord for the benefit of low- and moderate-income households and for the funding of community housing.

The Trust is concerned about the loss of naturally affordable housing in Concord and is prioritizing the use of its funds to preserve as well as create affordable units, including workforce housing to address the Select Board’s goal to enhance the diversity of the Town’s affordable housing stock.

We join the Concord Housing Foundation in finding that, in general, those in Concord with smaller, lower valued homes have lower incomes; and that the residential tax exemption is one of the few policy tools available for the Town to help low- and moderate-income homeowners.

The Housing Production Plan adopted by the Select Board in 2022 found that “older adults can also face other challenges in single-family housing situations, such as routine maintenance and upkeep, cost of property taxes, access to services, and transportation.”

To help low- and moderate-income renters, the Town could explore accepting the provisions of [MGL C.59,§50](#), added by [St. 2023, C.50,§3](#), by which a Select Board can establish an exemption for properties rented at an affordable rate (set by the Town), and occupied year-round by persons whose household income does not exceed an affordable rate (also set by the Town).

The Trust was an early supporter of the Planning Board’s MBTA Communities Zoning proposal including the affordability provisions which will require that, for projects of 10 or more housing units, 20% must be affordable at 80% of area median income (AMI).

Thanks very much for your leadership and support of affordable housing in Concord.

¹ Members Keith Bergman, Linda Escobedo, Rich Feeley, Mary Hartman voted in the affirmative; no members were opposed; members Mike Lawson and Kerry Lafleur abstained from the vote.



Concord Select Board Meeting
AGENDA ACTION REQUEST
Monday, November 18, 2024

3

Select Board Meeting

Public Comment

Requested by: SB Chair

Action Sought: None

Proposed Motion(s)

Public Comment

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

4

Consent Agenda

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Motion to Approve Consent Agenda: Consent Agenda:

- i. Meeting Minutes: November 4, 2024
- ii. Town Accountant Warrants: October 31, 2024; November 4, 2024
- iii. Gift Acceptances:
 - a. Concord 250 Gift Account from Anne W. Hayden in the amount of \$2,500 for the purpose of the Discover Concord Ad Campaign
 - b. Concord250 Gift Account from The Fenn School in the amount of \$5,000 for the purpose of the 250 Memorial Trees
 - c. Concord250 Gift Account from The Middlesex School in the amount of \$50,000 for the purpose of the 250 Memorial Trees
- iv. One Day Liquor License for Wines & Malt Beverages Only for the Concord250 Corporation for the Patriots Ball on Saturday, April 12, 2025 from 6:00 PM to 11:00 PM at the National Guard Armory, 91 Everett Street
- v. APP#10 Residential Exemption for Dr. Kurt Herman, of Carlisle Ma, to remain on the 2229 Main Task Force for the term to expire May 31, 2025, the formal completion date of the project.

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>

**Town of Concord
Select Board
Minutes
November 4, 2024**

Pursuant to notice duly filed with the Town Clerk, the Concord Select Board convened in a meeting both in-person at 22 Monument Square on the 2nd floor in the Select Board Room and via Zoom at 6:00 PM on November 4, 2024.

Present during roll call were Mary Hartman, Chair; Mark Howell, Clerk; Wendy Rovelli, Cameron McKennitt, Terri Ackerman attended remotely via Zoom.

Call to Order

Select Board Chair Mary Hartman called the meeting to order at 6:00 PM.

Roll Call

Ms. Ackerman – present
Ms. Hartman - here
Mr. Howell - here
Mr. McKennitt - here
Ms. Rovelli - here

Mr. Howell confirmed that all the members were present.

Public Comment

Elizabeth More 105 Blueberry Lane appeared before the Select Board to comment regarding the preference to use clickers for Town Meeting and if it might be a consideration to have Meridia in to speak to educate all of us of the benefits, cost, mechanics.

Consent Agenda

- a. Meeting Minutes: September 9, 2024
- b. Town Accountant Warrants: October 15, 2024; October 31, 2024
- c. Verizon Temporary License Agreement for Construction of the new Concord Middle School
- d. Gift Acceptances:
 - i. From the Collins Family to the Concord 250 Gift Account in the amount of \$2,500.00 and to be used for the 250 Memorial Trees
 - ii. From the Garden Club of Concord to the Concord 250 Gift Account in the amount of \$3,500.00 and to be used for the 250 Memorial Trees
- e. One Day Liquor License for Visnja Zarak for a Bat Mitzvah on Saturday, November 23, 2024 from 4:00 PM – 8:00 PM at the Concord Scout House

The vote passed 5-0-0.

**Town of Concord
Select Board
Minutes
November 4, 2024**

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the Consent Agenda. With thanks to the Collins family and Garden Club of Concord for gifts to the 250th Memorial Trees Gift account.

Roll Call Vote:

Ms. Ackerman - Aye
Ms. Hartman - Aye
Mr. Howell - Aye
Mr. McKennitt - Aye
Ms. Rovelli -Aye

Committee Appointments

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to Reappointment of Rose Cratsley of 79 Hillcrest Road, to the DEI Commission for a term to expire May 31, 2027.

The vote passed 5-0-0.

Roll Call Vote:

Ms. Ackerman - Aye
Ms. Hartman - Aye
Mr. Howell - Aye
Mr. McKennitt - Aye
Ms. Rovelli -Aye

Town Manager's Report

Town Manager, Kerry Lafleur reported on:

Doug White Field project has gained a lot of interest in the fields condition and there is a long - standing agreement, since 2007, that the Town manages operating and maintaining the fields but not replace the field.

Ms. Lafleur fielded general questions from the Select Board members. She suggested a Feasibility Study and review, and the importance of discussing the process currently and going forward for the fields.

Mr. McKennitt directed his question towards the goal of a Feasibility Study to determine the best approach to replacing turf or grass.

Ms. Hartman would like to include information on the costs associated and environmental issues as well as the Health and Safety impact

Ms. Rovelli expressed her support in having a public process on all the issues by performing an assessment.

**Town of Concord
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Mr. Howell provided some history of his role and the Doug White fields when they were first approved, and the replacement of the first system. Comments and concerns at the time from the community were heard about how the turf fields worked. At this stage, we have 15-years of experience, and did not anticipate the fields maintenance issues.

Mr. McKennitt mentioned reviewing the annual report completed on the condition of the fields, and the status of the fields currently, including timeframe and urgency.

It was agreed to discuss this topic in a December Select Board meeting, including the agreement documents for review to determine the town maintenance of the fields and the public private elements of the funding resources.

Ms. Ackerman supported the direction of the Select Board member discussion and suggested also including financial information and budget.

Ms. Lafleur continued with her update reporting on:

The Light Board, which will be conducting their budget and annual rate setting hearing in December, the town has applied for the IRS Clean Energy Credit for electric vehicles for a credit totaling \$52,500. The same \$7500 an individual would receive as credit for an electric vehicle. The issuance of RFP 25-2006 for a cell tower at the landfill. A site visit was conducted and several vendors attended. Responses deadline is November 25th

Town Manager also mentioned last week town's response to wildfires and the potential ban on outdoor burning, Salem MA and other communities. There may be an advisory issue regarding outdoor burning, based on State Fire Marshall statements.

- Solid Waste Curbside Recycling Program bins will be available for those residents that would be interested in downsizing to a 64-gallon bin vs the 96-gallon bin, starting sometime this week. Check the town website or contact Public Works.
- Water Service Line inventory currently under way with informational letter going out by November 15th, for homes built before 1986. Citizens with lead pipes or other materials, at low cost to residents, may participate in having the town replace the service line.
- Water Main Leak Detection program is going on and should not cause any inconvenience during testing.
- Roadwork update, November 15 is the date that private parties will be required to stop work in the Right of Way.

Ms. Lafleur ended her update with announcements about Veteran's Day Events.

Lastly, the town was awarded \$500,000 through the Complete Streets Funding Program.

Please visit the Town Manager's Webpage for the full [Bi-Weekly Operations Report](#) online and included in the Select Board meeting packets.

**Town of Concord
Select Board
Minutes
November 4, 2024**

Chair's Report

Chair Hartman announced an upcoming Joint Select Board Meeting with the School Committee and the Finance Committee on November 18th to discuss capital spending requirements for the next 10 years.

Ms. Hartman reported on:

- Housing Groups Roundtable is scheduled for December
- Commercial Roundtable Forum to discuss Commercial Development Business Groups, Concord Business Partners, Economic Vitality Group, Chamber of Commerce, MCI Advisory Board, 2229 Task Force and the public to discuss what we mean by commercial development and revenue generation potential and realistic grounding. Hosted by Economic Vitality Director in January.
- Sustainability Roundtable is being scheduled
- Consistent with our Select Board Goal for training, the chair proposed training related to First Amendment issues which impacts how we run our open meetings and our correspondence policy. We are considering a date in late November or early December. Details to follow.

Select Board Liaison Reports

Ms. Rovelli reported on:

- School Committee:

Reviewed their Capital Plans & Energy Projects: Focus on energy-related capital plans and collaboration with the town's energy management services contract. Energy savings could offset capital costs. Amenities Building discussion, design options under \$2M. Some plumbing code changes may reduce bathroom requirements; sink issues remain. Very preliminary Budget Forecasts with Five-year projections: CPS budget to grow 2.7%-3.5%; Regional budget 2.3%-3.6%.

- Planning Board:

MBTA Communities Zoning: Preliminary state feedback received earlier this year. The board prefers to submit the formal compliance model this year and await formal feedback before bringing any MBTA District zoning changes to town meeting. Parking Policy with regards to Residential vs. Business District: Simplification of residential parking requirements is being considered, and a proposal to waive parking requirements

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for new business uses in our business districts where parking requirements remain unchanged between old and new uses.

- Zoning Board of Appeals (ZBA):

40B Project – 40 Beharrell Road:

Project Details: 237 units in 2 five-story buildings; 25% affordable housing; mix of one, two, and three-bedroom units. Parking & Sustainability was also mentioned, with 474 parking spaces; 20% designated for EVs. Also being discussed is the potential for underground parking. The project was quoted as being All-Electric, further clarification is needed on gas appliance use.

Ms. Rovelli concluded her update with the next steps of peer reviews of civil engineering and traffic studies. The next formal review will occur on December 5th.

Mr. Howell reported on:

- Warners Pond

Drawdown feasibility Engineering assessment revealed control structures only allow for a 6-inch water level reduction, which may be insufficient for plant control; likely intended for spillway maintenance. There was some disappointment expressed over limited plant control options.

- MCI Advisory Board

Participated in a November 1 First Friday Forum hosted by the League of Women Voters, is available on MMN for viewing replay. They covered the project timeline and Advisory Board structure, which includes:

- Public Engagement Subcommittee (led by John Boynton).
- Legal and Government Affairs (led by Elizabeth Akehurst-Moore).
- Land Use Group (led by Peter Lowitt).

They had some Q&A, to keep the public updated.

MCI Advisory Board also meeting November 4 primarily discussing the drafting of RFP requirements to use state funds for planning, visioning, and zoning. Community outreach will be handled by town staff initially, with adjustments later based on the RFP outcome.

- Middle School Building Committee

Met last week, project continues to remain on schedule for February opening. An issue was discovered with sixth-grade lockers: custom design too small for practical use. Work Special meeting held to investigate and discuss design alternatives. The next regular meeting is scheduled for November 14 to when the building committee is likely to make final decisions about the lockers.

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Mr. McKennitt reported on:

- Town Meeting Subcommittee:

In-person and Last week an Online Forum held last week.

An in-person forum took place at Harvey Wheeler, which had 35-40 attendees, including Select Board members. An Online Forum was also conducted last week with very positive engagement.

The Survey Results included over 1,000 responses received from the now-closed survey. Eric Moore and the team were thanked by Mr. McKennitt. Some detailed analysis of the survey results will be presented next month, highlighting key feedback and potential recommendations to improve town meetings.

Ms. Hartman clarified that the Town Meeting Study Committee will present their results of the survey at an upcoming Select Board meeting, but they do not report to the Select Board but directly to the Town Meeting.

Mr. McKennitt concluded by stating that the focus areas include improving town meeting experiences and exploring legally constrained options like remote voting. The survey results revealed strong support for certain changes, e.g., 86% in favor of using clickers.

- Flag Policy Subcommittee:

Mr. McKennitt stated that the subcommittee has been considering whether to fly flags at a single location or multiple locations around the town. A new issue emerged regarding the display of flags representing United Nations countries. The subcommittee is now researching the best practices and developing clear guidelines to address this issue comprehensively. The Subcommittee is aiming to finalize and present its findings to the Select Board by December 16th.

Ms. Hartman followed up by mentioning the backlog for December's Select Board agendas, and that a moratorium on new flag policies remains in place while this work is completed, and townspeople are asked for their continued patience.

- Public Works and Recreation Commissions:

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In collaboration with Public Works and Recreation Groups the discussions are underway regarding the roles of various town departments in managing and maintaining the Doug White Fields. These fields represent a significant community asset, and there's ongoing dialogue about optimizing their use and upkeep.

Mr. McKennitt concluded that there were discussions with the Town Manager regarding roles in the Doug White Fields project and it remains a priority for the board as it assesses current needs and future responsibilities.

Ms. Ackerman reported on:

- 2229 Main Street

The 2229 Main Street Commission is finalizing its report, which will be made available to the public and officials.

- Hanscom Field Advisory Commission

Ms. Ackerman discussed the Economic Impact Meeting which took place with Chris Elliott (Hanscom Field Advisory Committee Chair), Mimi Graney, and Chris Carmody, where they discussed the economic impact and revenue implications of Hanscom Airfield's operations.

- Jet Fuel Tax Revenue:

The current state formula used for calculating jet fuel taxes may be outdated. Chris Carmody is liaising with the Department of Revenue to assess the formula's accuracy and its implications for potentially increased revenue for the town.

- Economic Impact Study:

The previous study includes both military and private jet operations, with military activities comprising 90% of the reported economic impact. There's a recommendation to reassess the study to focus solely on the 10% impact attributed to private jet activities, as it would provide a clearer rationale for Hanscom expansion proposals.

- Future Considerations:

If the formula is updated and revenue increases, this could strengthen the town's position in ongoing negotiations regarding Hanscom operations.

Ms. Ackerman reminded the public of the importance of participating in the upcoming election. She emphasized that voting is a civic duty and encouraged residents who haven't already voted to take advantage of the opportunity.

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November 4, 2024**

Ms. Ackerman summarized a recent visit from our sister city Nanae Japan: Along with other Board Members, they welcomed a group of nine international student visitors to the town. The visitors observed early voting processes and were particularly intrigued by how voting operates in practice. With keen interest in the ballot question regarding Massachusetts Comprehensive Assessment System (MCAS) graduation requirements.

In conclusion, Ms. Ackerman stated her support of the international student visitor experience, stating it is highly valuable in promoting international exchange.

Ms. Hartman thanked the League of Women Voters for hosting a recent MCI Forum and mentions how valuable the 1st Friday events are in building community ties, appreciating the hard work behind organizing these events.

Ms. Hartman reported on:

- Concord Housing Trust is actively reviewing its buy-down policy and will discuss this in a roundtable event in December. The Trust has also voted to support the Residential Tax Exemption and will send a letter to the Select Board.
- The Community Preservation Committee (CPC) applications are underway, with a total of \$1.2 million allocated for the year. This is less than the previous year's budget of \$1.8 million. Unspent funds can be reserved for future years. An overview of these applications will be given by the CPC in December.
- The Finance Committee (FinCom) is working on their guidelines for the upcoming fiscal year. They are collaborating with the Carlisle Finance Committee to create a unified guideline for the High School Budget.

Ms. Hartman concluded by mentioning the old barrels that are being repurposed by the Agricultural Committee, and farmers are very grateful to use them on their farms.

Ms. Ackerman raised the question about the impact of the Residential Tax Exemption, and the impact depending on whether residents qualify for the Residential Tax Exemption (RTE).

Ms. Lafleur clarified that FinCom is discussing FY 2026, and no decision on the Residential Tax Exemption will be made until the following year.

Discuss and Vote to Approve the Annual Town Meeting 2025 Adjusted Calendar

Ms. Hartman opened the discussion with a proposal for two changes to the Town Meeting 2025 Calendar. 1. Annual Town Meeting Warrants Open move from Monday, January 20th, falls on Martin Luther King Day, to Friday, January 17th to avoid any scheduling conflicts with the holiday. 2. Eliminate the Town Meeting Overview Meeting this year due to low attendance and may not serve its intended purpose this close to opening the warrants.

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Ms. McAndrew suggested talking about Town Meeting processes, and suggested Town Meeting Study Committee talk about this while they are active. Mr. Howell commented that the Coordination meeting is typically held in September to close out the previous year and to preview upcoming issues for the next year, specifically with regard to capital planning and major town projects.

Ms. Hartman supported eliminating this meeting and revisiting next year.

Ms. Rovelli suggested an educational session for citizen petitions may be beneficial. Ms. McAndrew clarified that there is information on the webpage for citizen petitioners to access information and the steps to take.

Ms. Porter commented that meetings have not always been helpful.

Ms. Ackerman mentioned the potential need for a vote, which had been clarified with Ms. McAndrew and the Town Clerk that a vote was not necessary.

The Select Board agreed that it might be appropriate to cancel this year's meeting and reconvene next year to reevaluate the format and need for such a session.

Upon a motion duly made and seconded, it was UNANIMOUSLY voted: to Approve Amended 2025 Town Meeting Calendar

The vote passed 5-0-0.

Roll Call Vote:

Ms. Ackerman - Aye

Ms. Hartman - Aye

Mr. Howell - Aye

Mr. McKennitt - Aye

Ms. Rovelli -Aye

Review and Discuss the 10-Year Capital Plan

Town Manager, Kerry Lafleur opened the discussion by introducing Anthony Ansaldi, Town CFO. Mr. Ansaldi introduced Senior Financial Analyst Zach

Mr. Ansaldi presented the 10-year capital plan which is in progress, with requests closed the previous Friday.

Mr. Ansaldi presented the software platform ClearGov, designed for budgeting purposes, and enhances transparency and community engagement.

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Key Points of this presentation:

- The total capital project requested amount is \$386 million, including major public building projects. Departments had over 30 days to submit requests, which are still in the vetting stage.
- Not all requests are final, and the schools have not yet submitted their budget.
- For 2026, \$32 million is requested, which exceeds the available budget.
- The request categories include infrastructure, public works, and facilities, with roadwork receiving particular attention.
- Projects are broken down by department and year, but full vetting and final numbers are pending.
- Multiple funding sources identified: borrowing, capital outlay, Chapter 90 for roads, and community preservation funds. The focus is on identifying and categorizing these funding sources accurately.
- A detailed example was discussed using fire department request for turnout gear replacement, the request includes vendor quotes and projected costs, with an emphasis on ensuring gear meets safety standards. The goal is to avoid outdated gear that may lead to liability issues.
- The planning process aims to avoid over-commitment of funds and ensures needs are met effectively.

Mr. Ansaldi emphasized focusing on long-term planning to avoid keeping capital projects open for extended periods. Also, expressing the importance of departments justifying capital requests. The goal is to match funding to actual project needs, ensuring efficient use of resources.

The software is already showing significant time savings by automating processes that were previously done manually with spreadsheets, allowing staff to focus on other priorities. And anticipating the first look at the operating budget on December 2, 2024.

In closing, Ms. Hartman emphasized the importance of the criteria being defined well for each department.

Discuss and Vote to Approve the PILOT Policy Draft Update

Mr. Ansaldi, Town CFO and Ms. Stone, Town Assessor, presented on:

Payment in Lieu of Taxes (PILOT) policy which aims to recover lost tax revenue from tax-exempt properties (state, federal, nonprofits). The policy aligns with the Select Board's financial planning goals of increasing revenue and stabilizing finances.

Concord's Land Use Breakdown was presented:

- 89% of Concord's land is taxable, 11% is tax-exempt, divided into:

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November 4, 2024**

- Town-owned land (39%): Public buildings, streets, open spaces.
- State-owned land (12%): Managed by entities like MBTA, MassDOT.
- Exempt Nonprofit properties (43%): Including hospitals, schools.

Ms. Ackerman raised concerns about nonprofits with children attending Concord schools. The impact on the school system should be considered in PILOT negotiations, on a case-by-case basis.

- PILOT agreements will be based on an amount equal to the percentage of tax levy that supports service of the Town's Police, Fire and Public Works operations. This percent is estimated to be 25% of the tax levy.
- The discussion concluded with an action plan to approve the policy with proposed changes (to be voted at the Nov 18 meeting), informing tax-exempt institutions and starting negotiations for PILOT payments.

Mr. Ansaldi and Ms. Stone were invited back to present to the Select Board on November 18th for a vote on PILOT policy updates as discussed.

Discuss the Dog Arbitration Update

Ms. Hartman recuses herself from the Dog Arbitration discussion due to her personal residence and knowledge of the complaint.

Mr. Howell, Town Clerk introduced this item discussion

Town Manager, Kerry Lafleur opened with a summary of what has transpired in assessing and resolving this issue which involves a resident requesting a dog hearing under town bylaw or Massachusetts General Law.

The Special Counsel previously reviewed the case. Animal control officer and police command staff are involved but unable to resolve the issue. The Select Board previously suggested mediation, which was engaged. Unfortunately, one party refused to meet, resulting in a stalemate on any resolution.

Ms. Lafleur emphasized the importance of legal counsel in guiding the Select Board through the process, especially given the potential legal implications of their decision.

The Select Board discussed legal risks associated with holding a hearing or declining to do so, acknowledging that lawsuits could arise but might lack merit if due process was followed. Members emphasized the need for clarity on procedural steps, particularly in assessing whether a hearing is warranted.

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Ms. Lafleur supported seeking further legal counsel to better understand the legal framework and implications of their decisions. There is a specific point of the law that includes mention of the nuisance of a sick person.

It was decided that the Select Board will plan to consolidate questions, seek counsel's input, and review the closeout report from the mediator, C4RJ, and then determine the next steps.

Mr. Howell proposed consolidating questions and schedule a Counsel briefing on the process and adding this topic to a future Select Board agenda for a vote.

Adjournment

Upon a motion duly made and seconded, it was UNANIMOUSLY
voted: to adjourn the meeting at 8:18 PM.

Roll Call Vote:

Ms. Ackerman - Aye
Ms. Hartman - Aye
Mr. Howell - Aye
Mr. McKennitt - Aye
Ms. Rovelli -Aye

Meeting Materials:

[Select Board Meeting Packet November 4, 2024](#)
[Concord Select Board November 4, 2024](#)



TOWN OF CONCORD
Office of the Town Manager
Town House
P.O. Box 535
Concord, Massachusetts 01742

To: Concord Select Board

From: Shannon McAndrew, Management Specialist

Date: November 18, 2024

Re: Gift Acceptance to the Town 250 Gift Account

The Select Board must accept gifts in the amount of \$500.00 or more. Included in the Consent Agenda of your meeting packet is a donation from the Anne W. Hayden of 342 Sudbury Road to the Town 250 Gift Account in the amount of \$2,500.00 for the purpose of the Concord250 Ad Campaign.

Town 250 Gift Account	\$2,500.00
Concord250 Ad Campaign	

Accepted: _____
Select Board Clerk

Date: _____



TOWN OF CONCORD
Office of the Town Manager
Town House
P.O. Box 535
Concord, Massachusetts 01742

To: Concord Select Board
From: Shannon McAndrew, Management Specialist
Date: November 18, 2024
Re: Gift Acceptance to the Town 250 Gift Account

The Select Board must accept gifts in the amount of \$500.00 or more. Included in the Consent Agenda of your meeting packet is a donation from The Fenn School to the Town 250 Gift Account in the amount of \$5,000.00 for the purpose of the 250 Memorial Trees.

Town 250 Gift Account	\$5,000.00
250 Memorial Trees	

Accepted: _____
Select Board Clerk

Date: _____



TOWN OF CONCORD
Office of the Town Manager
Town House
P.O. Box 535
Concord, Massachusetts 01742

To: Concord Select Board

From: Shannon McAndrew, Management Specialist

Date: November 18, 2024

Re: Gift Acceptance to the Town 250 Gift Account

The Select Board must accept gifts in the amount of \$500.00 or more. Included in the Consent Agenda of your meeting packet is a donation from The Middlesex School to the Town 250 Gift Account in the amount of \$50,000.00 for the purpose of the 250 Memorial Trees.

Town 250 Gift Account	\$50,000.00
250 Memorial Trees	

Accepted: _____
Select Board Clerk

Date: _____



TOWN OF CONCORD
Office of the Town Manager
Town House
P.O. Box 535
Concord, Massachusetts 01742

To: Concord Select Board

From: Shannon McAndrew, Management Specialist

Date: November 18, 2024

Re: One Day Liquor License for Henry Dane of the Concord250 Corporation

Included in your meeting packet is a One Day Liquor License application for Wines & Malt Beverages for Henry Dane of the Concord250 Corporation for the Patriot's Ball on Saturday, April 12, 2025 from 6:00 PM to 11:30 PM at the National Guard Armory, 51 Everett Street.

This application is complete with four bartender TIPS Certifications and payment. This application was also reviewed by Public Safety as part of the Use of Town Property permitting process and was approved by Public Safety.

RECEIVED
NOV - 5 2024

TOWN OF CONCORD
APPLICATION FOR ONE DAY SPECIAL LICENSE
FOR THE SALE OF WINES & MALT BEVERAGES/ALL ALCOHOLIC BEVERAGES

TOWN OF CONCORD
TOWN MANAGER'S OFFICE

Fee: \$75.00/per day - One Day All Alcoholic and/or Wines & Malt Beverages Only. Amount Paid \$ 75

The undersigned hereby applies for a One Day Special License in accordance with the provisions of the Statutes relating hereto:

NAME: (please print) HENRY DANE
COMPANY or organization: CONCORD 250 COOP.
ADDRESS: PO BOX 250
TELEPHONE: _____
DATE(S) APPLIED FOR: SAT APRIL 12, 2025
EVENT: PATRIOTS BALL
HOURS OF OPERATION: 600pm - 11:30
PREMISES TO BE LICENSED: NATIONAL GUARD ARMORY
ADDRESS OF PREMISE LICENSED: EVERETT ST

License is for the Sale of: All Alcoholic Beverages
Wines & Malt Beverages Only
Wines Only
Malt Beverages Only

The Licensed Activity or Enterprise is: For Profit
Non-Profit

Are the bartenders TIPS or equivalently trained? Yes No

Will there be people in attendance that are under the age of 21? Yes No

Is this the first one day special license secured by this organization? Yes No

If no, number of consecutive years licensed? _____

Will there be more than 100 people in attendance? Yes No

If yes, the applicant agrees to contact the Police Department to determine whether traffic control coverage is necessary. The traffic control coverage is provided at the expense of the applicant. that has been done

By exercising the privileges of this license in serving persons with alcoholic beverages, the licensee is potentially exposed to significant liability for injuries and damages to the persons served or to others who are injured or damaged by the persons served. Your acceptance and exercise of this license will be deemed to be acknowledgment that you are aware of this potential liability. You are encouraged to discuss the risks associated with exercising your privileges of the license and the precautions appropriate to avoid injuries, damage and liability to others with your legal advisor. The Town of Concord, and the Board of Selectmen, acting as the Local Licensing Authority, shall not be liable to the licensee or others if injury or damage shall result from the exercise of the license.

Signature of Applicant: [Signature] Date: 11/5/24
President



TOWN OF CONCORD
APPOINTMENT POLICY
EXEMPTION

As a representative of the appointing authority for the **2229 MAIN TASK FORCE** here by acknowledge the exemption of Dr. Kurt Herman from the Concord residency requirements as set out in the APP# 10, Section VII(g) for the following reason(s):

A current Carlisle resident, with expertise and experience to remain on the 2229 Main Task Force for a term to expire May 1, 2025 the formal completion date of the project.

I understand that appointments under section VII(g) shall be rare, and that the appointment shall specifically reference this section of this Appointment Policy.

Signed: _____

Appointing Authority: Select Board Chair

Date: November 18, 2024



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

5

Select Board Nominations

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Motion to Approve Select Board Nominations:

Select Board Nominations:

- i. Agnes Lubega-Kalisa of 12 Nathan Pratt Drive Unit 4 to the Diversity, Equity and Inclusion Commission for a term to expire May 31, 2027.
- ii. Edward Bernard of 42 Elsinore Street to the Concord Cultural Council for a term to expire May 31, 2027.

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

6

Town Manager's Report

Requested by: SB Chair

Action Sought: None

Proposed Motion(s)

None Anticipated

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



Concord Select Board Meeting
AGENDA ACTION REQUEST
Monday, November 18, 2024

7

Chair's Report

Requested by: SB Chair

Action Sought: None

Proposed Motion(s)

None Anticipated

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

8

Discuss Select Board Liaison Report Updates

Requested by: SB Chair

Action Sought: None

Proposed Motion(s)

None Anticipated

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>

FinCom (11/7)

The Guideline Process is underway. The Town presented their response to the FinCom FY26 Budget letter. The schools had presented their responses at a prior meeting. A preliminary guideline will be voted by FinCom on Nov 21 followed by their final guideline on Dec 19.

The FinCom emphasized their commitment to avoiding an Override and asked Anthony Ansaldi's help so they can include levy capacity in addition to property tax impact as inputs to setting the guideline.

Mike Lawson, Chair of Economic Vitality Committee, presented the challenges and strengths Concord poses for local businesses.

Concord Business Partnership (11/6)

Good discussion about items impacting the business community and actions that can be taken in the short-term to help including easing parking requirements and allowing secondary use in industrial districts.

NOTE: The Select Board is hosting a forum "What does Concord Mean by Commercial Development" to be held Jan 22, 6:00 in the Town House. Details tbd.

Re-Dedication of Civil War Monument and Veterans Day Parade (11/9 & 11/11)

Both went well – good weather, good crowd. Thanks go out to the Civil War Monument Task Force and the Public Ceremonies and Celebrations Committee.

Concord Housing Development Corporation (11/12)

Parcel 91B (corner of Main St and Rt 2) has a commitment from DPW for sewer hook-up which enables 4 units, total <+9 bedrooms to be built on the site. Next step is to determine construction costs, communicate with state to negotiate a sales price. (We have \$500K earmarked as ARPA for workforce housing at this site).

Work continues at Assabet River Homes. \$30K was allocated (not to exceed) for repairs to existing units. Setting up the condo docs is a complex process. An April 1 closing is anticipated.

An RFP for Junction Village is on hold until Jan 2025.

Public Works

I collected more data on the Doug White fields, as follows:

- The current fields were installed in 2015. Typical lifespan is about 10 years. Most manufacturers will provide an 8-year warranty.
- The original field was put in place prior to 2015, but it's believed there were installation/performance issues, and it needed to be replaced (not because of wear and tear; believe it was covered by the installer/manufacturer)
- In September, the fields were assessed by an independent third party, as they do every year. The fields passed inspection, and data from 2018-2024 was provided.
 - If you extend the trend line of field performance, it would indicate that the fields are at high risk of failing the third-party safety assessment by 2026
 - My conclusion is that replacement in 2025 is the prudent course of action. As a process of design, bid, contract etc. can take several months, it is timely to address.
- The Friends of CC fields donate \$50,000 each year for the maintenance of the fields. In addition, they have designated \$1.5M towards replacement of the fields - funds that can only be applied if the fields remain turf.

Town Meeting Subcommittee

On Tuesday, November 12, the Town Meeting Subcommittee approved a motion to recommend clickers for Town Meeting. While any further details will be conveyed by the Town Moderator and/or TMSC Chair, I am highlighting this because we may want to start considering funding sources for clicker purchase or lease (high level estimate maybe \$40K purchase or \$10-\$15K lease). Perhaps unused ARPA funds could be an avenue.

Flag Subcommittee

Preparing for final presentation and Select Board vote December 2. Meeting next week (target November 19) to review discrete choices and finalize materials.

PEG Access Advisory Committee: Negotiations with Comcast are proceeding well, and we anticipate bringing a contract to Select Board for a vote within the next few months.

2229 Main Street Task Force: Report is being finalized and Task Force will come to Select Board in December, followed by a Public Forum in early 2025.

Public Celebrations and Ceremonies:

Coordinated Veterans Day parade groups, speakers, and flag preparation.

Looking for new members, especially Veterans and people interested in history.

Examining their charge and may come to Select Board soon to recommend some changes, including reducing membership from 9 to 7. With only 6 members now, it is difficult to make quorum.

Cemetery Commission:

Continuing to work on Master Plan update.

Looking for summary of revenue and expenses. Kerry has agreed to attend Dec 4 meeting to provide and discuss these numbers.

School Committee:

- CPS & CCRSD 1st Qtr. budget transfers (across DESE budget categories) approved. CPS: \$1.3 M in Circuit Breaker funds expected to offset \$1.48M in projected OOD budget deficit. CCRSD: \$1.78 M in Circuit Breaker funds expected to offset \$2.27 M in projected OOD budget deficit. The remaining OOD deficit may be addressed through circuit breaker reserves (\$200K) and reduced OPEB contribution (\$200K).
- Amenities Building - Design options and associated cost to be presented on Nov 19th. ADA grants being pursued.
- Track - Outreach to community representatives to assist with leading fundraising is in progress. Current Emerson track is used by 5 different school varsity teams and shared access is challenging. Current track does not allow running and throwing activities to occur concurrently.
- 250 Trees - review of tree planting (n=114). Majority of trees at CCHS campus, others at Ripley and elementary schools; none at CMS.

Planning Board:

- Planned Residential Development proposal to modify density bonus to be based on inclusion of units for work force housing (between 110-150% of AMI) vs Affordable housing units (80% of AMI) was supported by the board. Language for TM article to be forwarded for review by Town Counsel.
- Draft parking bylaw amendment for business districts was discussed that would not require additional parking when a change in use from one permitted use to another permitted use, or to combined business/residence use, and no change in square footage does not increase the required parking above the number of parking spaces required for the current use. Board concern was raised because the proposed language does not address conditions that might have been associated with waivers approved for the current usage.



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

9

Discuss and Vote to Approve Public Seating License Agreement by the Town for Placement of Benches on Private Property

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Move to Approve Public Seating License Agreement by the Town for Placement of Benches on Private Property

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>

Benches for 250th

- Concord received a grant of \$27,000 from MOTT under the Destination Capital Grant program to install a set of benches.
- The goal is to boost economic vitality by facilitating pedestrian movement between Thoreau Depot, Concord Center and the North Bridge.
- Proposing a teak bench with a brass plaque commemorating the 250th.

Sites:

- 27 possible sites have been identified
- At least 7 sites are on private property requiring temporary easements
- At least 12 sites require HDC approval

Bench Style

Solid Teak Bench - "Foxhall" 6 foot
from Country Casual Teak

This same style can be seen at the
Sudbury Road entrance to the
Concord Library

Would include brass plaque
honoring the 250th

DIMENSIONS

WIDTH	DEPTH	HEIGHT	SEAT WIDTH	SEAT DEPTH	SEAT HEIGHT	ARM HEIGHT	WEIGHT	WEIGHT CAPACITY
72"	22.5"	37"	67.25"	18.25"	16.5"	26"	75 lbs.	900 lbs.



Installation details

- Installation by the Town using licensed contractor
- Mounting either with a sub-surface anchor & cable to allow movement for landscaping or L-brackets
- Easement document between property owner and Town. 3-year term. Town agrees to remove bench upon request at any time.



1- Reformatory at Monument St

HISTORIC DISTRICT:
North Bridge



4 – Lexington Road near Emerson House

HISTORIC DISTRICT:
Lexington Road



5 – Reformatory Trail at Lowell Road

HISTORIC DISTRICT:
North Bridge



6 – Monument Square

HISTORIC DISTRICT:
North Bridge

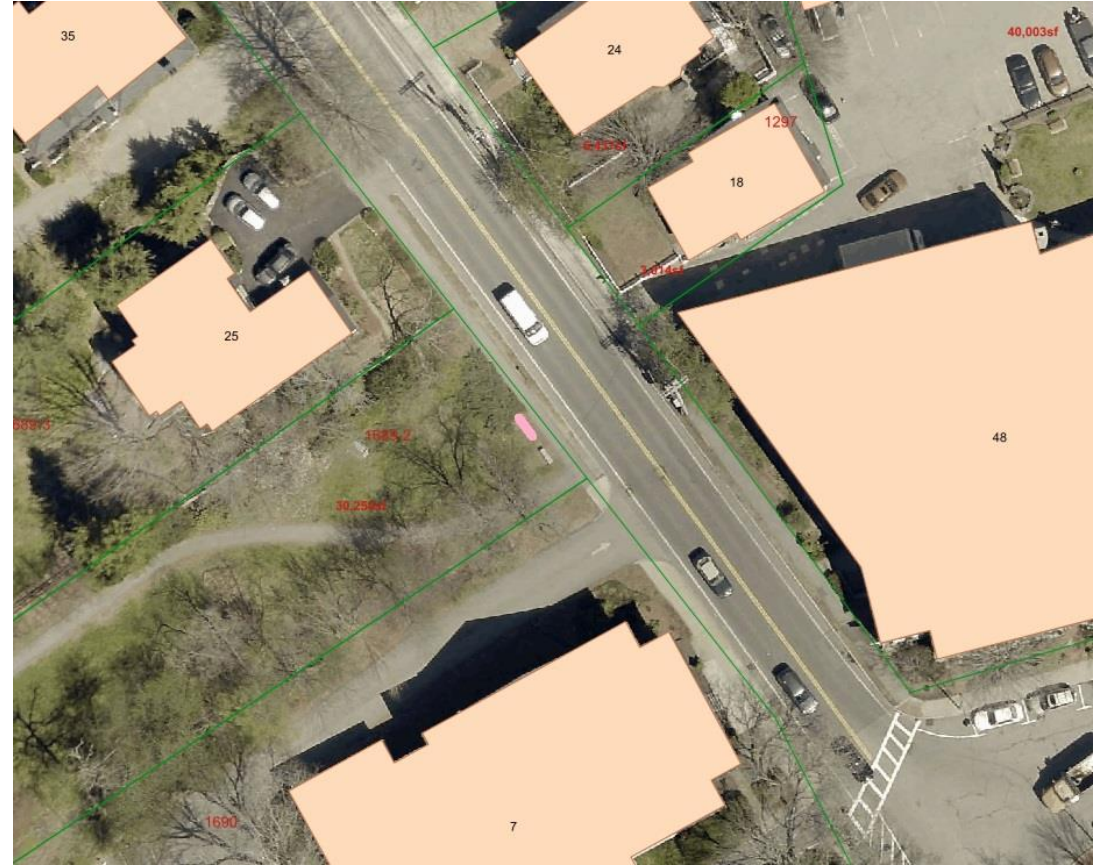


7-97 Thoreau St at Concord Printing



8 – Chamberlain Park

HISTORIC DISTRICT:
North Bridge



9 – Middlesex Savings Bank, rear

HISTORIC DISTRICT:
North Bridge



10- Middlesex Savings Bank, on Keyes Road

HISTORIC DISTRICT:
North Bridge



11 – 87 Stow St



12 – Stow at Sudbury Road



13 – Thoreau St at Emerson Field



14 & 15 – 89 Thoreau St at Target Painting



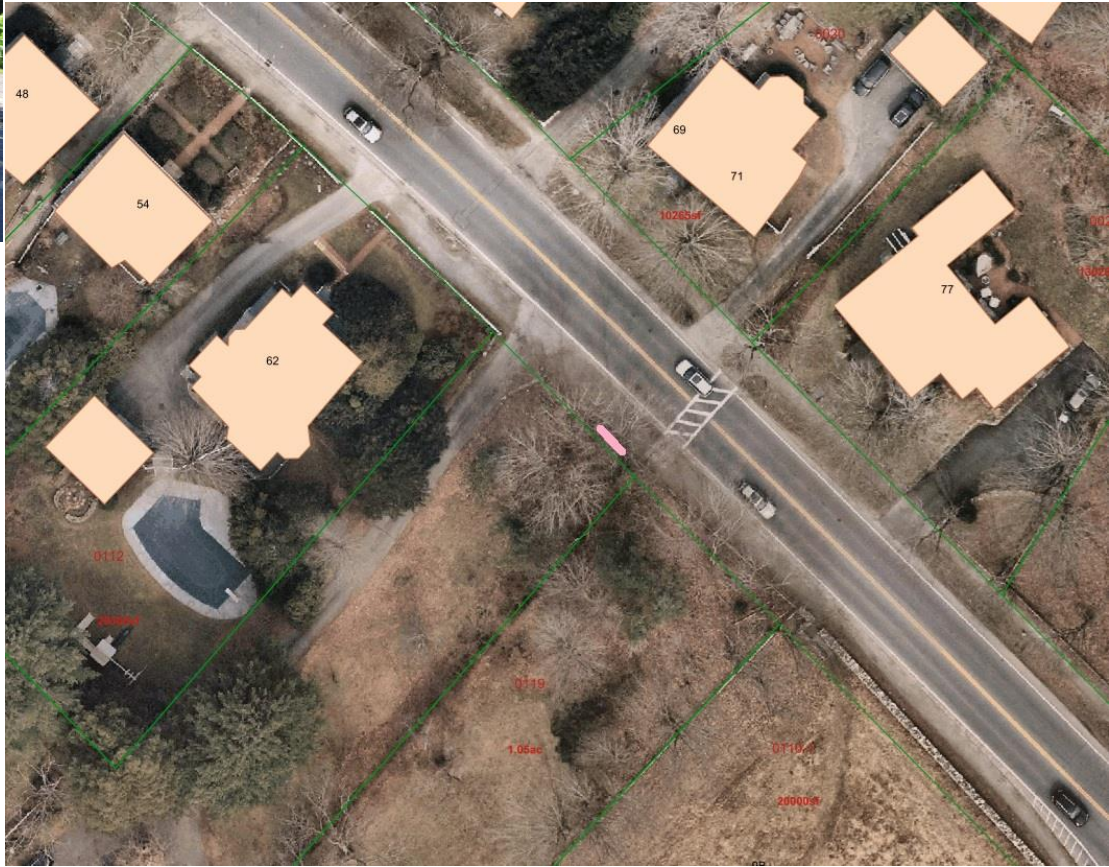
16 & 17 – Robbins House

HISTORIC DISTRICT:
North Bridge



18 – Lexington Road

HISTORIC DISTRICT:
Lexington Road



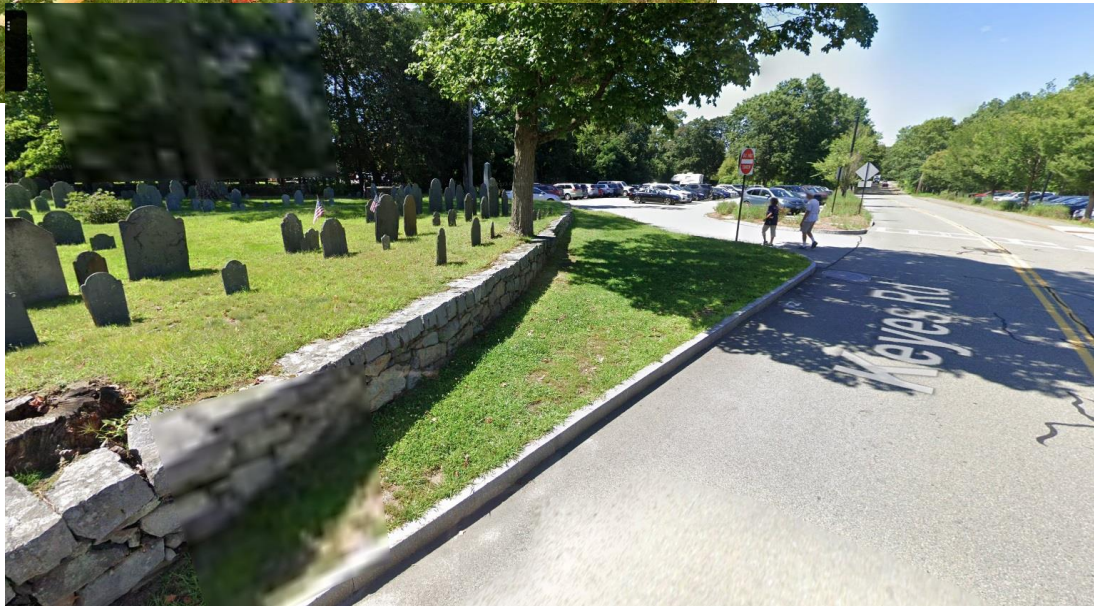
19 – Wright Tavern

HISTORIC DISTRICT:
Lexington Road



21 & 22 – South Burying Ground

HISTORIC DISTRICT:
Main Street

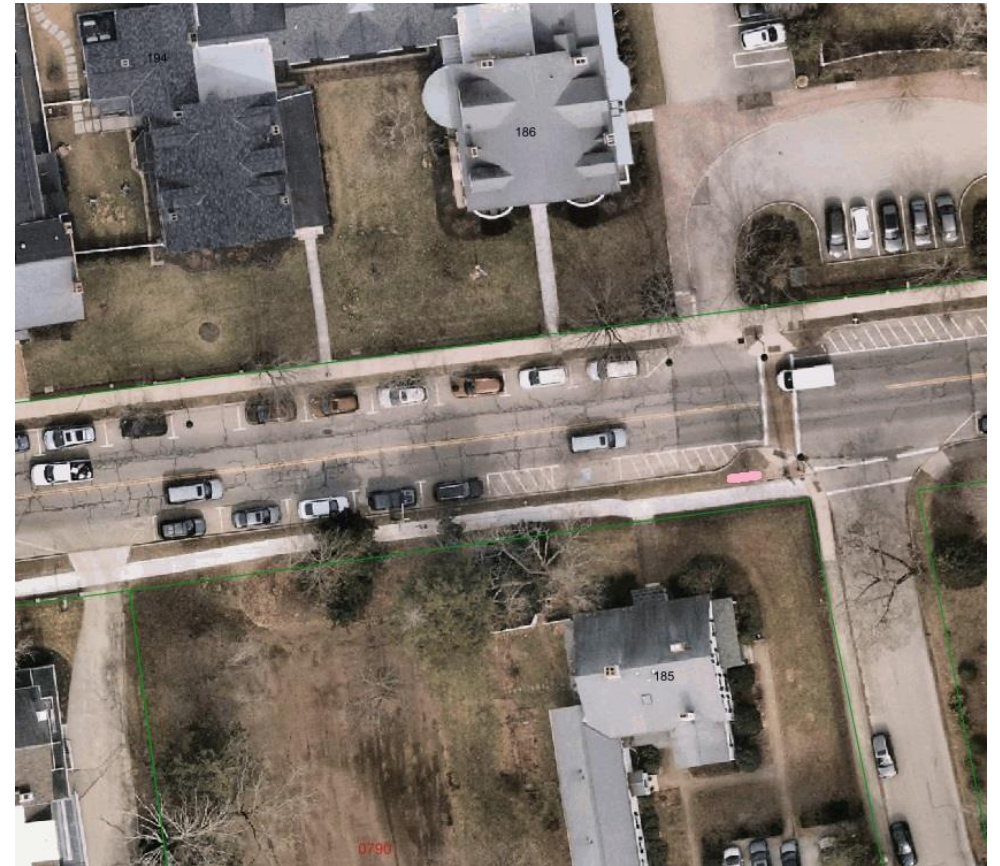


23 – Concord Provisions



24 – 185 Main St curbside

HISTORIC DISTRICT:
Main Street



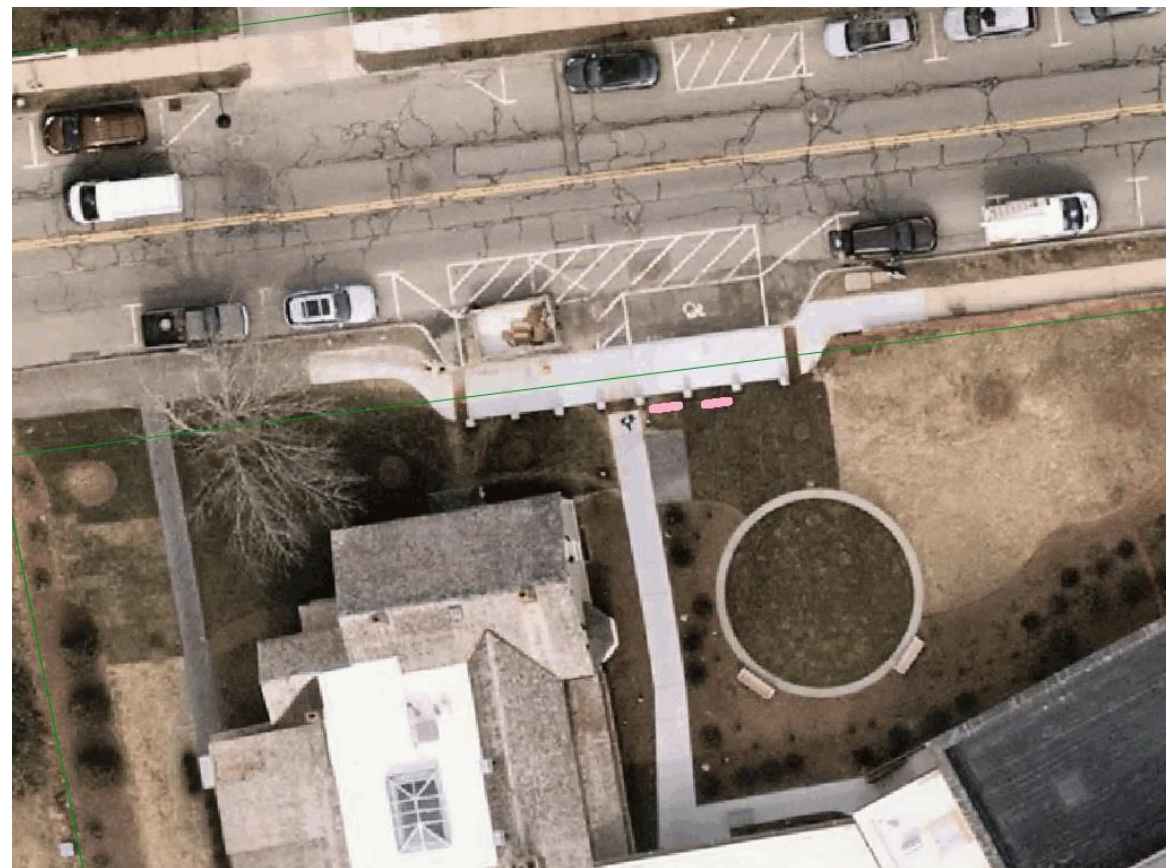
25 – 191 Main St property side

HISTORIC DISTRICT:
Main Street



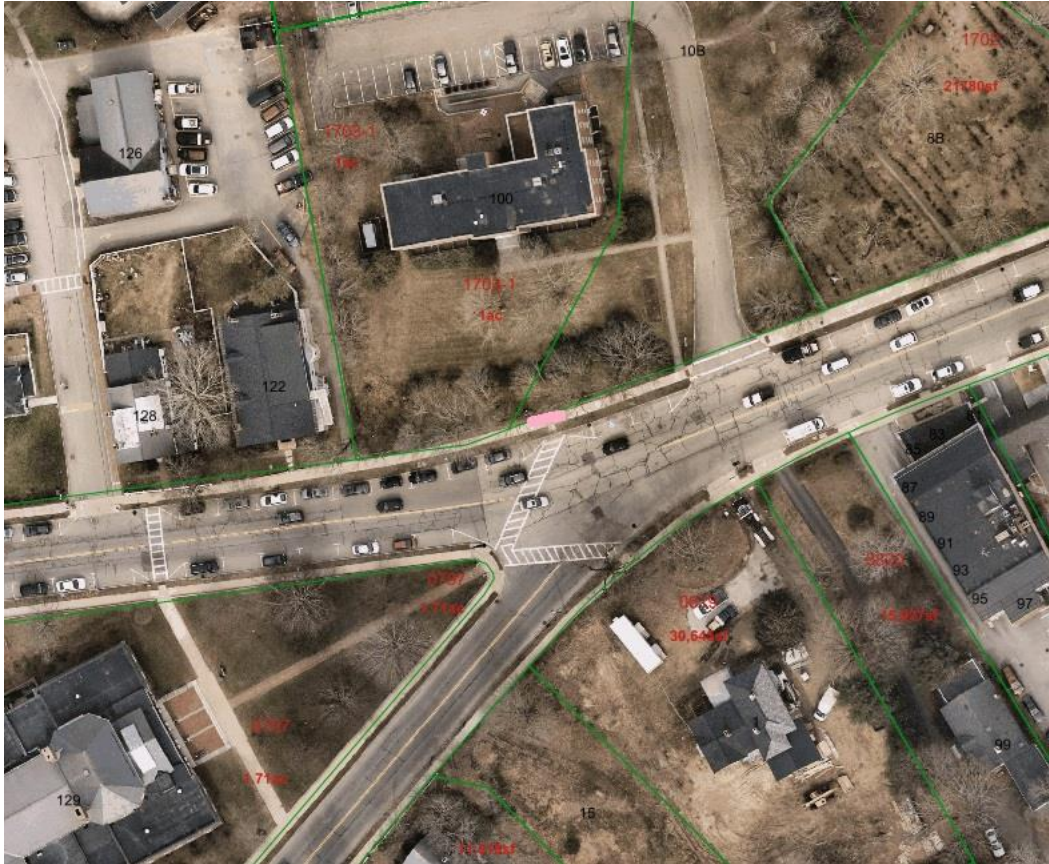
26 – Concord Library, accessible entrance

HISTORIC DISTRICT:
Main Street



27 – 100 Main Street

HISTORIC DISTRICT:
Main Street



PROPOSED BENCHES FOR 250TH DESTINATION CAPITAL GRANT PROGRAM

Bench #	Site	Public/Private	Authorizing entity	PID	MBLU	HDC district
1	Reformatory Trail at Monument St	Public	NRC?			North Bridge
2	Alley at 26 Walden	Public	CPW			Main Street
3	Alley at 26 Walden	Public	CPW			Main Street
4	Lexington Road near Emerson House	Public	CPW			Lexington Road
5	Reformatory Trail at Lowell Road	Public	NRC?			North Bridge
6	Monument Square	Public	CPW			North Bridge
7	97 Thoreau St at Concord Printing	Public	CPW			No
8	Chamberlain Park entrance	Public	CPW			North Bridge
9	Middlesex Savings - rear, 64 Main St	Private	Middlesex Savings Bank, 120	6634	9H/1700/ / /	North Bridge
10	Middlesex Savings - side	Private	Middlesex Savings Bank, 120	6634	9H/1700/ / /	North Bridge
11	87 Stow Street	Public	CPW/Rec			No
12	Stow Street at Sudbury Road	Public	CPW/Umbrella			No
13	Thoreau St at Emerson Field	Public	CPW			No

14	89 Thoreau St at Target Printing	Private	Joseph Martines Trustee, M&	100283	9G/750/ / /	No
15	89 Thoreau St at Target Painting	Private	Joseph Martines Trustee, M&	100283	9G/750/ / /	No
16	Robbins House	Public	Robbins House, National Park			North Bridge
17	Robbins House	Public	Robbins House, National Park			North Bridge
18	Lexington Road before Heywood Meadow	Public	CPW			Lexington Road
19	Wright Tavern, accessible entrance	Private	First Parish, Wright Tavern, 2	2983	9H/9/ / /	Lexington Road
20	Heywood Meadow	Public	NRC			Lexington Road
21	South Burying Ground	Public	CPW			Main Street
22	South Burying Ground	Public	CPW			Main Street
23	73 Thoreau St, Concord Provisions	Private	Anu LCC, c/o Viren Patel, 73	6922	9G/777/ / /	No
24	185 Main Street - curb side at Concord Academy	Public	CPW, Concord Academy			Main Street

25	191 Main Street - property side at Concord Academy	Private	Concord Academy, 166 Main	2910	9G/790/ / /	Main Street
26	Concord Free Public Library - accessible entrance	Private	Library	2918	9G/797/ / /	Main Street
27	100 Main Street	Public	CPW			Main Street

PUBLIC SEATING LICENSE AGREEMENT

This Public Seating License Agreement (this “License”) is executed as of _____, 202__ by and between [**Landowner**] (hereinafter referred to as “Licensor”), and the TOWN OF CONDORD, a Municipal Corporation duly established under the laws of the Commonwealth of Massachusetts, and having its usual place of business at 22 Monument Square, Concord, Massachusetts 01742 (hereinafter referred to as the “Town” or “Licensee”).

RECITALS:

WHEREAS, Licensor is the owner of the property known as _____ [**ADDRESS**] by virtue of a deed recorded in the Middlesex South District Registry of Deeds at Book ___, Page ___, which parcel is identified on the Town of Concord Assessor’s Map as _____ (the “Property”);

WHEREAS, throughout 2025, Licensee is hosting commemorations of the 250th anniversary of the American Revolution and the historic battles of Lexington and Concord (the “250th Celebration”);

WHEREAS, Licensee lacks a sufficient number of public seating areas in sites to serve the needs of visitors to the Town walking between the public transit station at Thoreau Depot and Concord Center and key historic sites;

WHEREAS, Licensor’s property is well-suited to accommodate a public seating area to be used by Licensee and the expected visitors due to its proximity to the location of the 250th Celebration, public transit and visitor destinations surrounding Concord Center;

WHEREAS, Licensee desires to use the portion of the Property shown as “Proposed Bench Site” on the plan attached hereto as Exhibit A (the “License Area”) for installing public seating areas, including benches; and

WHEREAS, Licensor wishes to accommodate Licensee and permit the use of the License Area by Licensee in accordance with the terms and conditions of this License.

NOW, THEREFORE, for good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. License and Permitted Use. Licensor hereby grants a license to Licensee to install a Bench or Benches, as defined herein, within the License Area and to use the License Area for the Term, as defined herein, as a public seating area. The License Area shall be available to Licensee (including its officers, officials, employees, servants, contractors, and agents) and to all members of the public during the Term. Licensee shall have the right to publicize access to the License Area via maps, trail guides, and websites.

2. Term. This License shall commence on _____, 2025 and shall terminate no sooner than May 31, 2027 (the “Term”) pursuant to Section 3.

3. Condition. The License Area shall be delivered to Licensee in its "as is" condition. Licensee shall vacate the License Area and return it to Licensor either within (1) sixty (60) days of revocation of this License pursuant to Section 8, or (2) if not so revoked (a) May 31, 2027, or (b) within sixty (60) days after a written notice by the Licensor to vacate the License Area from the Licensor, whichever is later, in as good condition as upon the initiation of the Term, reasonable wear and tear associated with the permitted use under this License excepted. Any damage to the License Area shall be repaired by the Licensee. Upon expiration or termination of this License, Licensee shall have no further rights in or access to the License Area.

4. Benches. Licensee agrees to and shall provide, maintain, repair, and replace as necessary, at all times during the Term of this License and at its sole cost and expense, _____ (____) bench(es) to be located within the License Area ("the "Bench" or "Benches") as depicted on Exhibit B. Licensee shall not interfere with Licensor's use of the License Area for the purposes contemplated by this License.

5. Interest in Property. Notwithstanding any other provision of this License, the parties intend that this License constitutes a terminable license and no interest in real property is created hereby.

6. Notice. Notices, statements and other communications to be given under the terms of this License shall be in writing and delivered by hand, sent by first class mail or by recognized overnight courier or by facsimile or email transmission with proof of delivery, and addressed as follows:

If to Licensor:

If to Licensee:

**Town of Concord
22 Monument Square
Concord, MA 01742
Attention: Mimi Graney, Economic Vitality
Manager**

Either party may, by notice to the other, designate a different address or addresses for notices, statements, demands or other communications intended for it.

7. Revocation. This License is granted at the pleasure and discretion of Licensor and is revocable at any time upon 60 days' written notice from either party to the other.

8. Consequential Damages. In no event shall Licensee, or its successors or assigns, be liable for any indirect or consequential damages.

9. Authority. Licensor and Licensee each represent and warrant that they each are duly authorized to enter into this License, and that the person or persons executing this License has or have full authority to do so and to fully bind their respective parties.

10. Miscellaneous. This License constitutes the full and final expression of the agreement between the parties and contains all terms of their agreement with respect to the License Area. This License supersedes all prior understandings between the parties in connection with the subject matter hereof, whether oral or written. This License shall be interpreted, construed, applied and enforced in accordance with the laws of the Commonwealth of Massachusetts. If any provision of this License shall be held or deemed to be, or shall in fact be, invalid, inoperative or unenforceable because of the conflict of such provision with any constitution or statute or rule or public policy or for any other reason, such circumstance shall not have the effect of rendering any other provision or provisions herein contained invalid, inoperative or unenforceable, but this License shall be reformed and construed as if such invalid, inoperative or unenforceable provision had never been contained herein and such provision reformed so that it would be valid, operative and enforceable to the maximum extent permitted. This License may only be amended by a written instrument, clearly designated to be an amendment, signed by all parties. This License may be executed in a number of identical counterparts, each of which for all purposes is deemed an original, and all of which constitute collectively one agreement. Electronic signatures on this License shall have the same force and effect as an original signature.

[Signatures to appear on following page.]

IN WITNESS WHEREOF, the parties have executed this License as a sealed instrument by and through their respective duly authorized representatives as of the day and year first above written.

LICENSOR:

By: _____

Name:

Title

LICENSEE:

TOWN OF CONCORD

By: _____

Name: Kerry LaFleur

Title: Town Manager

Hereunto duly authorized

Exhibit A

License Area
(to be attached)

Exhibit B
Bench Specifications
(to be attached)



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

10

**Discuss and Vote to Approve Recreation
Requesting Authorization for more than 2
Food Trucks at the Town Tree Lighting on
December 1, 2024**

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Move to Approve Recreation Requesting Authorization for more than 2 Food Trucks at the Town Tree Lighting on December 1, 2024

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>



OLD NORTH BRIDGE

TOWN OF CONCORD

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

To: Select Board
From: Mardi Hutchinson, Recreation Supervisor
Date: November 5, 2024
Re: Request for approval for Three (3) Trucks to Participate in Concord Tree Lighting December 1, 2024

[Concord's Food Truck regulations](#) require the attendance of more than two food trucks to receive Select Board Approval.

Seeking approval for three or more trucks as part of a community celebration reviewed as part of the usual Use of Town Land Permitting process by town staff. As per Concord Food Truck policies two licensed food trucks may be included and approved within the scope of the event. Any additional mobile vendors beyond two require Select Board approval. We have three confirmed as of today, but request your authorization for 3 plus with Board of Health approval.

1. Event

[Concord Tree](#) Lighting

Sunday December 1, 2024

2:00 to 6 pm

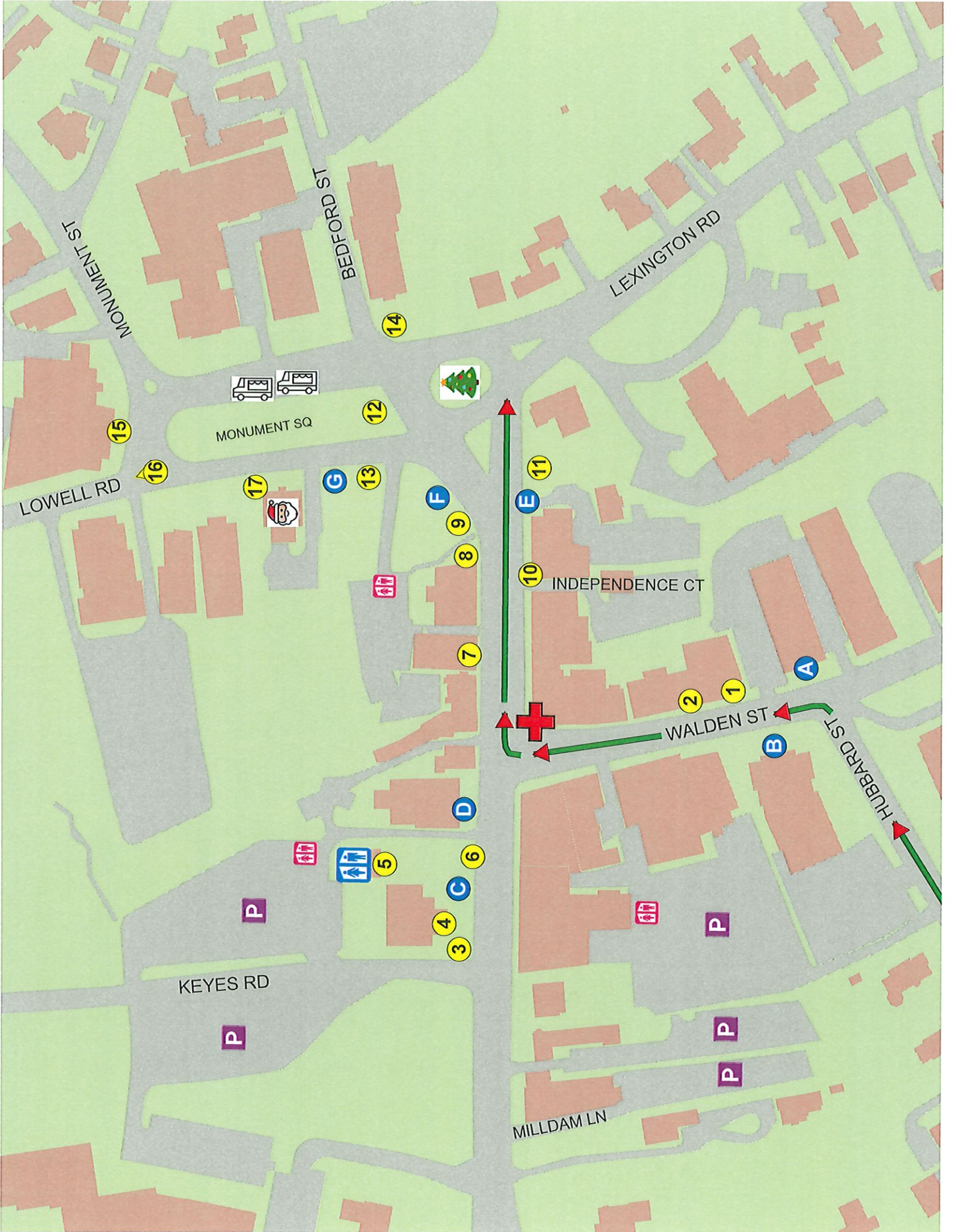
Monument square, Concord Center

2. Selected Food Trucks

- Twisted Pickle
- Muddy Water Coffee
- Moo-licious Cookies
- TBD

3. Location

- The event takes place in Concord Center, "the square", Main St and Walden St.
- Food Truck Proposed Location – In front of the town house but next to the monuments
- **Map details, see below**



MONUMENT ST

BEDFORD ST

LEXINGTON RD

MONUMENT SQ

LOWELL RD

INDEPENDENCE CT

WALDEN ST

HUBBARD ST

KEYES RD

MILLDAM LN

15

16

17

12

13

F

9

8

7

D

5

C

4

3

E

10

11

2

1

A

B

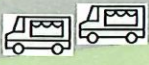
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Town of Concord
22 Monument Square, PO Box 535
Concord, Massachusetts 01742
Phone: (978)-318-3000

PERMIT FOR USE OF TOWN PROPERTY

Permit Holder: Town of Concord Recreation
Event Name: Concord Annual Tree Lighting
Event Date: 12/1/2024
Event Location: Concord Center
Date Issued: 11/7/2024
Authorized By: Megan Zammuto, Deputy Town Manager
Authorized Signature: Megan J Zammuto

Permit Conditions

The following conditions apply to all permits for the use of town property. Please review carefully, as compliance is required for all events on Town property:

1. **Cleanup and Restoration:** Permit holders are responsible for ensuring that the property is left in the same condition as it was found. Any cleanup or restoration required after the event may incur additional fees.
2. **Liability:** The permit holder assumes full responsibility for any injury or damage to Town property during the permitted event. The Town of Concord is not liable for any incidents arising from this event.
3. **Permit Display:** While it is not required to carry this permit on-site, please ensure that relevant parties are aware of the event approval.

Contact Information:

For questions or changes regarding this permit, please contact Amanda Moore at amoore@concordma.gov.

Select Board Approval Request:

Monday, November 18, 2024

Mary Hartman, Select Board Chair

Mark Howell, Select Board Clerk

Terri Ackerman, Select Board Member

Cameron McKennitt, Select Board Member

Wendy Rovelli, Select Board Member



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

11

Discuss and Vote on PILOT Policy

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Move to Approve PILOT Policy

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>

TOWN OF CONCORD

APP#67 (Proposed)

Payment in Lieu of Taxes (PILOT) Policy

PURPOSE

Payments in lieu of taxes help local governments offset losses in property taxes due to the existent of nontaxable State, Federal and other non-profit entities.

The Town of Concord, through its various departments, provides a variety of services to its residential, commercial and non-profit organizations located or conducting business within the Town border. While municipal service requirements vary among these diverse groups, all benefit from the overall enhanced quality of life enjoyed by the community. However, the cost of municipal services is substantial, and the Commonwealth of Massachusetts has limited the sources of revenue available to municipalities. In Concord, property tax provides approximately 85% of municipal revenue and is paid by the residents and commercial taxpayers only. Revenue generated from property taxes is determined by law (Proposition 2 ½), mix of land uses, and geography.

The Town is approximately 26 square miles in size and is largely built out. New development is based primarily on reuse. The current makeup of the Town based on land use is approximately 89% taxable land and 11% non-taxable. The following table is a breakdown of non-taxable land in Concord:

A taxable parcel that becomes tax-exempt does not reduce the Town's total tax levy. Instead, it shifts the tax burden to all remaining taxable parcels. It is a primary goal of the Town to preserve its taxable land, while at the same time continuing to support its rich cultural diversity. It is also a goal of the Select Board to have the cost burden of providing services borne by and shared among all residents, taxpayers, commercial entities and non-profit institutions, to the extent possible and reasonable.

The Commonwealth of Massachusetts and its political sub-divisions, including the Town of Concord, have historically been recognized as leaders in historical preservation, healthcare, education, arts and culture, and have encouraged non-profits to organize in the state to enrich the quality of life of its residents. The General Court of the Commonwealth created a series of property tax exemptions within the General Laws (M.G.L. Chapter 59 Section 5) as an incentive to support the often-vital work of non-profit organizations.

The Town's location in relation to Boston Metro Area, its unique historical and cultural legacy, and its easy access to mass transportation and major roadways, makes it attractive for non-profit institutions to locate in Concord. Concord recognizes that non-profit organizations contribute directly to the quality of life within the community and welcomes them to the town.

To maintain a fair balance between the cost of town services and payment for those services, the Select Board has developed a policy to address the need for a payment-in-lieu-of-tax (PILOT) program for tax exempt properties.

POLICY

To maintain the financial health of the community and the Town's ability to continue to provide a range of quality services, the Town must preserve its existing tax base and expand that revenue source where reasonably possible. It is the Town policy to distribute the burden of cost in a fair method among all users of services: individual citizens, businesses and non-profit institutions.

M.G.L. Chapter 59 section 5 enables the granting of tax-exempt status to certain non-profit organizations. Once an organization is granted an exemption, the Town cannot legally require that organization to pay a property tax or bind that organization to give up the rights to these legal exemptions. Therefore:

1. The Town will seek voluntary PILOT Agreements with all tax-exempt institutions within the community that own real property, or that rent real property from the Town (pursuant to MGL Chapter 59 section 5, sub-section 2B).
2. These PILOT Agreements should be based upon fair market value and tax levy. PILOT Agreements should be established on the basis that the non-profit organization's payment amount is equal to the percentage of tax levy that supports the critical services of the Town's Police, Fire, Public Works operations and other Town services depending non-profit entity. The Town has determined that this share is equal to at least [25%] of the full levy. If a non-profit organization enters into a voluntary PILOT agreement, the Town may offer to phase in the impact over a period of time. The Town expects to negotiate PILOT agreements, whereby once the payment target is reached, the payment will annually increase by an escalation factor generally equal to the average historic growth in annual tax levy.
3. A PILOT Agreement will remain in force for the entire tenure of its contractual term if the use and value established in the PILOT Agreement have not changed. All property under a PILOT Agreement must still meet all the requirements for eligibility for exempt status.
4. A PILOT Agreement does not replace the requirement that each organization, owning property on January 1, and seeking property tax exemption must file a "Return of Property Held for Charitable Purposes" form (State Tax Form 3ABC) with the Board of Assessors on or before March first of each year.



Concord Select Board Meeting
AGENDA ACTION REQUEST

Monday, November 18, 2024

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Adjournment

Requested by: SB Chair

Action Sought: Approve

Proposed Motion(s)

Move to Adjourn

Additional Information

Board Action

<i>Motion</i>	<i>Second</i>	<i>In favor</i>	<i>Opposed</i>	<i>Disposition</i>