

**Exhibit B**  
**PROJECT STATUS REPORT**  
**for the Community Preservation Committee**

**Project Name:** Concord Historic Preservation Plan

**Project Number:** 09-FY24 **Status Report Date:** 12/23/25

**Project Award Date:** 7/1/23 **Project Completion Deadline (30 months after award):** 12/30/25

**Interim Status Report.** *The awardee shall submit an Interim Status Report twice per year in April and October, or on such other schedule as requested by the CPC. The CPC may request a site visit and/or copies of any completed studies or materials for its files.*

**Final Status Report.** *Once the Project is complete, the awardee must submit a Final Report to the CPC. The Final Report shall include narratives; a detailed expenditures report; before, during, and after photographs; and any other defined conditions specific to the Project established by the CPC. In the narratives, please describe the Project in its entirety, from start to finish.*

**Extension Request.** *If the awardee anticipates the CPA-funded portion of the Project will extend beyond the thirty (30) month grant period, then prior to the end of such period, an extension request must be submitted in writing to the CPC for consideration. If an extension request with an accompanying explanation for such request is not timely received, the CPC may decide to return any remaining unexpended funds to the General CPA fund. Please provide a detailed justified Extension Request for consideration by the CPC under item 6 below.*

**1. Brief Project Summary (one paragraph from application describing the Project goals, scope and budget):**

*The Town of Concord and the Concord Historical Commission received \$50,000 in CPA funding to hire a team of historic preservation consultants to create a Concord Historic Preservation Plan. The Plan is intended to support integrated, cross-disciplinary goals of the community-wide plan Envision Concord, Bridge to 2030 (2018), reflect national historic preservation priorities, and coincide with the 250<sup>th</sup> anniversary of the Battle of Lexington and Concord in 2025 and the founding of the U.S. in 2026.*

**2. What is the date your Project began or will begin spending the CPC funds?** 6/10/2024

**3. What is the expected Project completion date?** 12/31/2026

**4. What percentage of the Project has been completed to date?** 90%

**5. Describe work completed to date and key Project milestones that have been reached:**

July 2023	Massachusetts Historical Commission (MHC) and Community Preservation Committee award grants for the Historic Preservation Plan project
January 2024	Purchase order for preservation consultant Heritage Strategies issued
July 2024	MHC Phase I – Project Background complete. Meet with MHC.
November 2024	MHC Phase II – Outreach complete. Meet with MHC.
May 2025	MHC Phase III – Recommendations complete. Meet with MHC. Consultants submit first full draft plan to Town of Concord
August 2025	Stakeholder and public comment period on preliminary draft plan
September 2025	Submit preliminary draft plan to MHC
December 2025	MHC Phase IV – Final Plan. Submit plan to MHC to complete MHC project requirements.

Phase I: Background

This information-gathering phase, which overlapped with Phases II and III, resulted in the following draft products: a review and analysis of model historic preservation plans; an introduction to preservation planning; annotated listing of preservation partners and stakeholders; historic context and themes of Concord; history of historic preservation planning in Concord; historic properties inventory analysis; National Register of Historic Places analysis; and a description of municipal bylaws, regulations and management.

Phase II: Outreach

Since community input was so central to the planning effort, public outreach began early in the project, while Phase I was still underway. Consultant outreach included one-on-one interviews with stakeholders as well as four focus group meetings centered on historic preservation, heritage tourism, open space and education. At Town Meeting in 2024, the Concord team launched a preservation survey in both digital and paper form. Survey flyers and postcards were mailed to every household in town, handed out to Town Meeting attendees, and made available at the library and other public venues. Throughout May, June and July of 2024, the survey was advertised in the local newspaper, on the Town website and social media platforms. Products of this phase included a draft public awareness and engagement analysis, overview of historic preservation issues and challenges, and Table of Contents. Public outreach continued in subsequent phases, through a public forum and public release of a preliminary draft plan.

Phase III: Recommendations

The consultant presented emerging ideas for goals and actions at a public forum in November of 2024, prepared lengthy draft recommendations in December 2024 and the first full draft of the plan that was submitted to Concord on May 6, 2025. Consultants submitted a full second draft plan to Concord in July 2025. Since January 2025, the Concord team necessarily held work sessions nearly every week to review and develop recommendations and to check and rework each and every section of the document in order to help ensure its relevance, accuracy and accessibility. For a three-week review period in August 2025, the Concord team shared a draft plan with the public and with key stakeholders who participated in Phase II interviews and focus group sessions. Products of this phase included a draft historic preservation plan, power point presentation utilized at the public forum and a public forum/ comments summary report.

Phase IV: Final Plan

Stakeholder and public feedback informed the creation of the final plan for MHC. Electronic and bound copies of the final Historic Preservation Plan were provided to the Town of Concord and MHC in accordance with the MHC contract.

**5. Describe the remaining work on the Project and projected timeline it will be complete:**

*The Historic Preservation Plan submitted to MHC in December 2025 will benefit from a more extensive and final round of public comments. An extension is needed to allow time for a second public comment period and for incorporating those comments into the plan. The Concord Historical Commission plans to release the 90% complete Historic Preservation Plan to the public and roll out the plan to various boards and committees in the first few months of 2026. As a part of this roll-out, the Commission will consult with the Planning Board about a key recommendation of the Plan: a Metropolitan Area Planning Council preservation assessment of Concord zoning, subdivision rules and regulations, and other land use tools. This assessment could take the form of an appendix to the Historic Preservation Plan.*

*We are requesting an extension through December 31, 2026.*

**6. Expenditure Report:**

**a. Attach a detailed Expenditure Report to this Project Status Report**

**Concord Historic Preservation Plan Project**

<b>CPC Grant</b>		<b>10963618-5319</b>		
<b>Beginning Balance, July 1, 2023</b>				<b>50000</b>
<b>Professional services - Historic preservation consultant</b>				
			24200	
Heritage Strategies, Inv 1	6/10/2024	FY24	-10192	
Heritage Strategies, Inv 2	9/3/2024	FY25	-2235	
Heritage Strategies, Inv 3	12/17/2024	FY25	-9252	
Heritage Strategies, Inv 4	12/17/2024	FY25	-2000	
Heritage Strategies, Inv 5	4/4/2025	FY25	-521	
				-24200
<b>Professional services - Tribal Advisor</b>				
Bruce Curliss	6/18/2024	FY24	-723.26	
Bruce Curliss	6/18/2024	FY24	-498.26	
				-
				1221.52
<b>Public Survey</b>				
Concord Printing	6/24/2024	FY 24	-1583.5	
Concord Printing	6/24/2024	FY 24	-1861.8	
Concord Bridge	6/24/2024	FY 24	-225.72	
				-
				3671.02
<b>Technical services</b>				
Capital strategic	11/26/2024	FY25	-440	
Capital strategic	12/17/2024	FY25	-385	
Capital strategic	3/6/2025	FY25	-110	
				-935
<b>Current Balance, December 23, 2025</b>				<b>-30027.5</b>
				<b>19972.46</b>

**b. Account for the amount of CPC funds expended to date with a brief narrative**

*Community Preservation Funds were used to hire a preservation consultant, Heritage Strategies, LLC, to facilitate the planning process and develop a Historic Preservation Plan (\$24,400, matched 1:1 by the Massachusetts Historical Commission). In addition, Community Preservation Funds were used to hire a Tribal advisor for the plan, to document selected public meetings, and to advertise the preservation survey to every household in Concord and in the Concord Bridge.*

**c. Account for any remaining unexpended funds**

*The MHC grant helped cover project costs, reducing the amount of Community Preservation Funds spent to date.*

**7. Describe your outreach efforts:**

A section and appendix in the Historic Preservation Plan describe the process and results of public outreach efforts. The following is a brief summary from the Introduction:

*The people of Concord played a key role in shaping preservation goals and recommendations in this plan. Project team members made it a priority to engage with Concord citizens in order to ensure that the plan is grounded in community needs and aspirations and a diversity of perspectives are represented. A detailed survey distributed to every household in Concord, stakeholder interviews and focus group sessions, informal gatherings, public meetings, a public forum and a public comment period provided essential input and helped shape the goals and recommendations of the plan.*

*Public work sessions took place nearly weekly throughout 2025. This extension request is based on the community's desire for additional public outreach.*

**8. Additional comments or explanation for the CPC to consider.**

**Name of person who completed this Report:** *Ann Clifford, Senior Planner*

**Date:** *12/23/25*

**Contact Information /Email Address:**

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