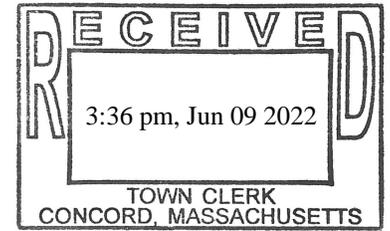


Concord Municipal Affordable Housing Trust
Thursday, May 12, 2022 at 1:30 pm
[Virtual Meeting via Zoom](#)
Approved Meeting Minutes



1. *Call to Order / Roll Call* – Chair Keith Bergman called the meeting to order at 1:34 pm on Zoom. Roll call of members present: Linda Escobedo, Mike Lawson, Frank (“Rich”) Feeley, and Keith Bergman. Kerry Lafleur was absent.

2. *Approval of minutes* – Linda Escobedo moved to approve the meeting minutes of April 14, 2022; seconded by Rich Feeley; approved by unanimous vote (4-0).

3. *May 2022 Annual Town Meeting Recap – affordable housing articles* – The chair noted that all three money articles dealing with affordable housing development—Articles 24, 25 and 26-- had passed on Day 1 of the May 1, 2022 Annual Town Meeting; while the one dealing with zoning—Article 33, Zoning Bylaw: Zoning Map & Thoreau Depot Business District-- had failed.

The chair thanked Linda Escobedo for the excellent [presentation](#) she made at town meeting on behalf of the Select Board on Article 24, which transferred \$500,000 from Free Cash “to the Concord Municipal Affordable Housing Trust (CMAHT) for the purpose of developing or supporting affordable housing within the Town.” Per the Select Board, federal ARPA funds will be used to backfill this appropriation from Free Cash. See [MMN video on Article 24](#) at 2:17:30 to 2:30:42. The Finance Committee had also unanimously supported this article. Its statement to town meeting delivered by member Ray Andrews indicated that FinCom “continues to be concerned with the reliance of free cash for annual affordable housing funding. We applaud the guidelines recently established by the Municipal Affordable Housing Trust and look forward to the update of those guidelines to provide goals around the number and type of housing to be converted or created as well as the associated unit cost. We recommend annual reporting to town meeting of the sources and uses of trust funds.”

In discussion, Mike Lawson volunteered to set up a chart of accounts to track sources and uses of trust funds, including types of units, which CMAHT could include in an annual report of the trust’s activities. Linda Escobedo indicated that the Housing Production Plan and any numerical goals it generates should be transparent about goals for affordability levels—60%, 80%, 100% of AMI or greater-- including what affordable and market rate units are on the subsidized housing inventory. Rich Feeley mentioned that Minuteman National Park has federal funds to upgrade some of its properties which are to be made available as rental housing, which we might be able to subsidize as affordable. Mike Lawson volunteered to contact the park superintendent to explore this opportunity.

The two articles dealing with the Assabet River Bluff land acquisition project— Article 25, Assabet River Bluff Preservation Project and Article 26, Community Preservation Committee Appropriation Recommendations (which included Item F, Town of Concord – Assabet River Bluff Preservation and Housing – Land Acquisition)—were both also supported unanimously by the Select Board and Finance Committee, and with both passed by well more than a 2/3 vote of

town meeting, as declared by the Moderator. In response to a question from town meeting floor about whether the proponents are “willing to fight to get the full five units” of affordable housing on Parcel A, Concord Housing Development Corporation Chair Lee Smith had replied that CHDC “will control that property and put in the five units.”

CMAHT members did a debrief on the failed zoning Article 33 for Thoreau Depot, which Day 2 town meeting voters had disapproved by a vote of 305 in favor and 366 opposed. Members hoped that the issue of expanding affordable housing opportunities through zoning can be revisited and be addressed in the update of the Housing Production Plan. The chair noted that a set of final guidelines for MBTA communities would be issued by the State’s DCHD later in the year, and pointed to an article in that morning’s Boston Globe entitled, “[The housing divide is pulling Massachusetts apart.](#)”

4. *Sources of Trust funds. Updates on real estate transfer fee & building permit surcharge legislation; use of ARPA funds; exploring additional/alternative funding sources; annual town meeting articles and appropriations* – On Monday, May 9th, the legislature’s Joint Committee on Housing requested a further extension through June 15th for adopting a recommendation on [H.1377](#) and [S.868](#) “An Act empowering cities and towns to impose a fee on certain real estate transactions to support affordable housing.” Prompted by the LOHA coalition, Keith Bergman had sent an email on behalf of the Trust (attached) to the legislature’s Housing Committee leadership, and to House leaders, asking for favorably action on the statewide bills for a real estate transfer fee for affordable housing. Linda Escobedo indicated that the Select Board had sent a similar letter, which she had drafted for them. LOHA coalition thought it important for members of the Mass. House of Representatives to let their leadership know of members’ support for the bills.

5. *Use of Trust funds. Assabet River Bluff land acquisition project (5 affordable units) – reporting requirements for grantees* – Of the \$650,000 approved by the Trust for the Assabet River Bluff project, \$600,000 goes towards the July 2022 closing for property acquisition (including \$50,000 already paid towards the deposit); the remaining \$50,000 is to be used for project expenses. Linda Escobedo indicated that the Concord Housing Development Corporation would soon be seeking reimbursement for certain of its pre-development expenses. Members indicated the Trust should explore what the form of a grant agreement, deed restriction, reporting and other requirements with its grantees should be, including acknowledging the Trust as a source of funding, just as Concord’s Community Preservation Committee requires of its grant recipients. The chair said he would seek references and assistance for developing a grant agreement, recordkeeping, and reach out to CHCD about a budget and timetable for the project.

6. *Housing Production Plan Update – Focus groups, community survey, Steering Committee meeting schedule* - Focus group meetings on Zoom with Housing Production Plan consultant JM Goldson were held April 20-28, 2022. An HPP [community survey](#) can be filled out online. The HPP Steering Committee meeting be holding meetings on Zoom at 4 pm on May 18, June 15, July 27, October 19, and December 7, 2022.

7. *Outreach: Massachusetts Housing Partnership, Lexington Affordable Housing Trust Study Committee: MHP* - As previously reported, on March 16, 2022, Chair Keith Bergman had made

a presentation on recent housing efforts in Concord at an MHP (Massachusetts Housing Partnership) webinar on helping multiple entities work collaboratively. Lexington - On March 23, 2022, the chair made a presentation to the Lexington Affordable Housing Trust Study Committee using the presentation made to MHP. LWVCC DEI Committee - The chair reported that he had been invited by the Diversity, Equity & Inclusion Committee of the League of Women Voters of Concord-Carlisle to participate on a panel looking at land use, zoning and housing in Concord through a DEI lens. It's to be part of an adult ed series LWVCC DEI plans to offer this fall.

8. *Public Comment* - None.

9. *Future Meetings* - Next CMAHT meeting will be on Thursday, June 9, 2022 at 1:30 PM on Zoom.

10. *Adjournment* – Mike Lawson made a motion to adjourn the CMAHT meeting, seconded by Rich Feeley. Motion passed unanimously (4-0). The meeting adjourned at 2:45 pm.

Document attached

- CMAHT email to state legislators to support H.1377 and S.868 for real estate transfer

To: Ronald.Mariano@mahouse.gov; Aaron.M.Michlewitz@mahouse.gov; James.Arciero@mahouse.gov; John.Keenan@masenate.gov; Patricia.Jehlen@masenate.gov; John.Rogers@mahouse.gov
Cc: 'Mike Barrett' <Mike.Barrett@masenate.gov>; Tami.Gouveia@mahouse.gov
From: Keith Bergman <keith@kbergman.com>
Sent: Friday, April 29, 2022 9:52 AM
Subject: Concord MAHT urges favorable action on H.1377 | S.868 real estate transfer fee for affordable housing

Dear Speaker Mariano, Chair Michlewitz, Chair Keenen, Chair Arciero, Vice Chair Jehlen and Vice Chair Rogers:

Please know that the Concord Municipal Affordable Housing Trust strongly and unanimously supports [H.1377](#) and [S.868](#) “An Act empowering cities and towns to impose a fee on certain real estate transactions to support affordable housing,” and urges members of the Joint Committee on Housing to report this bill out of committee favorably, and House leadership to support this bill which will empower municipalities to better address the immense housing needs of their residents. Our municipalities need this NOW.

As you know, cities and towns throughout the Commonwealth are facing a **major housing affordability crisis** and desperately need funds to both develop affordable housing *and* prevent the displacement of current residents. This enabling legislation will empower those communities that choose to do so to place a small fee of .5% to 2% on higher-end real estate transactions to fund affordable housing. This legislation is intentionally adaptable so that different municipalities can enact the type of transfer fee that works for their community. Even with more accommodating zoning regulations and the forthcoming American Rescue Plan Act funds expected to be allocated for housing, additional and reliable funding sources are desperately needed, and transfer fee revenue will permit the subsidies required to construct truly affordable housing.

The Town of Concord’s subsidized housing inventory currently stands at 10.54%-- above its Chapter 40B goal-- and H.1377 and S.868 would provide important opportunities for our voters to continue to support affordable housing efforts in town by adopting a local option real estate transfer fee as a dedicated funding source. In recent years, Concord town meeting voters have not only voted to establish the Concord Municipal Affordable Housing Trust, but also appropriated \$500,000 annually to fund affordable housing efforts, and filed home rule legislation for a dedicated local funding source like that envisioned in H.1377 and S.868. In so doing, voters recognize that Concord needs predictable, sustainable revenue sources so that funds are readily available when affordable home opportunities arise, and that without the necessary funds to act quickly, valuable opportunities could be missed.

Thank you so much for all that you have done on affordable housing already, and for your continued attention to this intersectional issue that impacts each and every resident of the Commonwealth.

Keith Bergman, Chair
Concord Municipal Affordable Housing Trust

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