

Agenda

[Link to Agenda Center](#)

I. Call to Order

II. Public Comment

III. Consent Agenda

Favorable action is requested: Motion to approve the Consent Agenda which includes the:

- a. Minutes: Executive Session Minutes for Approval but Not Release – February 25, 2026, Open Session Minutes: February 25, 2026
- b. Town Account Warrants: March 2, 2026, March 9, 2026, March 10, 2026
- c. Nominations:
 - i. Paul Keen as an Associate Member of the Historic Districts Commission as the Concord Free Public Library nominee, to complete an unexpired term ending January 1, 2028.
 - ii. Alison Green of 304 Old Marlboro Road to the Trustees of Town Donations expiring on May 31, 2028
 - iii. Susan Meyers of 66 MacArthur Road to fill an unexpired term on the Planning Board with term data of May 31, 2027
- d. One Day Liquor Licenses:
 - i. All Alcoholic Beverages One – Day Liquor License for Melissa Karczewski of the Concord Carlisle Foundation for an Annual Fundraiser at the Concord Armory, 91 Everett St. on Friday, April 10, 2026 from 7:30 PM to 11:00 PM.
 - ii. Wine and Malt Beverages One- Day Liquor License for Henry Dane for the 2026 Patriots Ball at the Concord Armory on Saturday, April 11, 2026 from 6:00 PM to 11:00 PM.
- e. Bias and Hate Incident Reporting Group Charge: Revision to Extend Deliverables Date to May 15, 2026.

**Town of Concord
Select Board Meeting
Meeting Minutes
February 25, 2026**

Approved 03/ / 26

Pursuant to notice duly filed with the Town Clerk, the Concord Select Board convened in person on Monday, February 25, 2026 at 5:00 PM at the Town House, Select Board Meeting Room, 22 Monument Sq. The meeting was available for public access in person and via Zoom.

Call to Order

Present were: Mark Howell, Chair, Wendy Rovelli, Clerk, Mary Hartman, Paul Boehm and Cameron McKennitt.

Executive Session

Upon a motion duly made by Ms. Rovelli and seconded it was UNANIMOUSLY **voted** to enter Executive Session at 5:03 PM under M.G.L. c. 30A, § 21(a)(3) to discuss strategy with respect to collective bargaining or litigation; Archstone v HDC/ TOC (651 Lowell Road) and Hannon et al v MIG Corp/ TOC/ CMLP (1175 Elm Street), if an open meeting may have a detrimental effect on the bargaining or litigation position of the body.

Mr. Boehm – Aye
Ms. Hartman – Aye
Mr. Howell – Aye
Mr. McKennitt – Aye
Ms. Rovelli – Aye

The Select Board returned to open session at 6:10 PM. All Select Board members were present.

Public Comment

Tanya Gailus of 62 Prescott Rd. raised concerns regarding the lack of specificity included in the Land Use Working Group agendas and shared concerns that draft modifications may have been made by the Public Works Subcommittee outside of a posted meeting. Ms. Gailus also expressed concern about the procedure taken during the writing of the *Select Board Proclamation Affirming the Town's of Concord's Commitment to Opposing Antisemitism, Adopting the International Holocaust Remembrance Alliance (IHRA) Working Definition of Antisemitism, and Promoting a*

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Welcoming and Inclusive Community. Ms. Gaillus would have preferred it if the Select Board had scheduled more discussion regarding the IHRA definition of antisemitism, noting that agendas were not specific enough and that some documents (like the proclamation draft) were circulated among board members without being simultaneously posted for the public. She also expressed a desire for more discussion on the IHRA definition of antisemitism.

Ece Turnator of 168 Cambridge Turnpike expressed strong opposition to the Select Board's recent decision to adopt the IHRA definition of antisemitism and stated that the Select Board ignored the concerns of experts and residents. Ms. Turnator stated that there was an anonymous complaint made to the Concord Police Department labeling the documentary *No Other Land* as "one side and antisemitic" which resulted in the Library Director ordering a police detail for the screening of the film at the Fowler Library. Ms. Turnator stated that the screening of the film was nearly cancelled due to inflated claims of antisemitism.

Daniel Stapleton of 20 Conant St. stated that his comment comes following a letter that he submitted to the Select Board earlier in the week. Mr. Stapleton requested that the Select Board delay the bidding process for a cell tower at Rideout Park until due diligence studies are completed.

Mahreen Hoda of Carlisle criticized the Select Board's adoption of the IHRA definition of antisemitism, arguing that state level recommendations were misrepresented. Ms. Hoda also expressed concerns over suppression, citing letters from the American Civil Liberties Union (ACLU) and other experts. Ms. Hoda stated that IHRA examples are frequently weaponized to silence critics of Israel's policies and chill constitutionally protected speech. Ms. Hoda requested that the board hold an evidence based discussion to mitigate the harm caused by the proclamation.

Aris, a Concord Public Schools student, expressed anger in response to the Select Board's adoption of the IHRA Definition of Antisemitism. Aris stated that the 15- minute public comment period allotted during previous meetings was insufficient for the board to make an informed decision on the matter. Aris noted that there has been an uptick in anti-ICE signs around town that use quotes from Anne Frank and he questioned whether the board planned to condemn the signs as antisemitic under the newly adopted framework.

Cynthia Katz of 20 Conant St. praised the Select Board for the transparent and inclusive process used to address wireless issues in Concord Center, which included surveys and listening sessions. However, she argued that West Concord has not received the same level of transparency or due diligence. She criticized the rush to issue a request for proposals (RFP) for a cell tower at Rideout Park, asserting that there is no documented service problem or public urgency for a tower at that location

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Ms. Katz highlighted that Rideout Park is a beloved and well-used playground, and she requested that the board slow down the process and conduct a thorough analysis of alternative sites, such as the West Concord Fire Station.

Ruth Bryant of 21 Conant Street opposed the Rideout Park cell tower proposal due to health concerns and its proximity- less than 200 ft., to a playground. She argued the equipment would diminish limited recreational space and urged the board to consider alternative sites.

Consent Agenda

- a. Minutes for Approval: January 27, 2026, February 2, 2026
- b. Town Account Warrants: February 2, 2026, February 12, 2026, February 17, 2026, February 18, 2026
- c. One Day Liquor Licenses:
 - i. Wine & Malts Beverages only for Grace Bellavance for OARS for an Art Exhibit and Speaker Talk at Concord Art 37-37.5 Lexington Rd. on March 14, 2026 from 6:30 PM to 8:00 PM
- d. 2026 Tour Guide License for Gayle Potter of 332 Russell St., Carlisle
- e. Select Board Nominations:
 - i. Laurie O'Neill of 4 Chestnut St. to the Concord Cultural Council for a term to expire May 31, 2029.
 - ii. Jack Megan of 106 Southfield Rd. to the Concord Cultural Council for a term to expire May 31, 2029.

Upon a motion duly made by Ms. Rovelli and seconded, it was **UNANIMOUSLY voted:** to approve the Consent Agenda without the removal of the January 27, 2026 meeting minutes.

Mr. McKennitt provided copies of written edits to the January 27, 2026 meeting minutes to each of the Select Board members. These edits will be reviewed by the Select Board and the January 27, 2026 minutes will be presented at the next Select Board meeting.

Select Board Appointments

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Upon a motion duly made by Ms. Rovelli and seconded, it was UNANIMOUSLY **voted:** to approve the re-appointment of Sue LaChance of 18 Studley Court to the West Concord Cultural District Committee for a term to expire on May 31, 2029 and the re-appointment of Susan Beck of 190 Prairie St. to the West Concord Cultural District Committee with a term to expire on May 31, 2029.

Chair's Report

Chair Howell noted possible community confusion regarding the board's recent proclamation on antisemitism and proposed scheduling a future meeting to clarify whether the town has formally "adopted" the IHRA definition or is merely using it as a reference tool. Chair Howell reported that the board received alleged open meeting law violation complaints related to the development of the January 27th proclamation and outlined a timeline for reviewing these complaints in open session and seeking legal guidance, tentatively scheduling a review for March 10th. Chair Howell shared an invitation from the Secretary of the Commonwealth for a March 11th event celebrating the 250th anniversary of the evacuation of Boston. He invited other board members to attend as he is unavailable.

Town Manager's Report

Ms. Lafleur presented the February monthly projects report, highlighting that the town is currently tracking approximately 50 projects across nine departments. She noted that many initiatives are successfully transitioning from the planning and design phases into execution, testing, and closeout. Key highlights from the report include- Project Spotlight: The Baker Avenue Culvert- the road repair is essentially complete, with traffic controls removed and only sidewalk restoration remaining for the spring. Infrastructure; Utilities: The Light Plant has completed system-wide installation of advanced metering and is preparing for the April activation of time-of-day rates. Additionally, wastewater capacity planning and coordination with MCI are progressing to support long-term capital decisions; Public Safety: The Fire Department is continuing its transition to Advanced Life Support (ALS) ambulance service, with a target launch date of July 2026 meanwhile, the police department is moving forward with upgrades to its records management systems; Technology and Planning: Several long-term initiatives are underway, including cybersecurity enhancements, the Climate Action and Resilience Plan update, and the Re-imagine MCI Concord master planning initiative. Ms. Lafleur emphasized that the work for the remainder of fiscal year 2026 is being strictly aligned with the fiscal year 2027 capital plan, which is currently moving toward public hearings. She concluded by attributing the steady progress and the town's ability to maintain

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services during a difficult winter to disciplined execution and strong cross-departmental coordination.

The Town Manager's Monthly Project Report which can be found [HERE](#).

Questions and comments were as follows:

Gratitude was expressed by Chair Howell to the town staff for their work during the snowstorms, citing that there were no power outages. Suggestions were made for further formatting that could be made to the Town Manager's Project Report. Ms. Zammuto shared that there was one analysis of West Concord cell coverage that has been completed and the topic will be on a future agenda. Ms. Lafleur shared that there is a capital project that has been approved for a feasibility study to look at the potential expansion of the Harvey Wheeler kitchen. Ms. Hartman requested that Ms. Lafleur keep in mind future building use plans when making capital investments. Mr. McKennitt stated that the school district applied for a Green School Works grant to assist in funding the CMS solar project and shared with residents that the electric bill for the month of April, to be received in May, will have the time of day rates on it. Ms. Boehm stated that the Comprehensive Transportation Study will be presented to the Select Board in the next couple months.

Presentation and Vote: Public Art Proposal – Sidewalk Decals (“Art Loop”)

Presenter: Anne-Catherine Mauk and Sue LaChance, Chair of the West Concord Cultural Committee

Ms. Mauk provided the presentation stating that the decals were received positively last year by businesses and the community. The details of the project are consistent with Upon a motion duly made by Ms. Rovelli and seconded, it was **UNANIMOUSLY voted:** to approve the Public Art Proposal – Sidewalk Decals (“Art Loop”) as presented.

Presentation: Review of Local Initiative Program (LIP) Process for Affordable Housing and NOVO 40b.

Liz Rust, Co-director, Regional Housing Services Office reviewed the memo *RE: Review of LIP Process for Affordable Housing and NOVO*.

Questions and comments yielded the following information:

Ms. Rust stated that rent increases for affordable units, which are limited by the regulatory agreement and have been successfully negotiated in the past when income limits have increased by a large percentage, would be approved through the Planning Department by the same process that is utilized currently. Ms. Rust stated that the regulatory process for future LIP projects would allow the town to review and approve before the next approval at the state level and that MA Housing 40B is only used for towns that have less than 10% of their housing units designated as affordable on the

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Subsidized Housing Inventory (SHI). The monitoring fee is the responsibility of the town under the LIP process. Though, in this case, it is proposed that the developer pay this fee annually to the town. The town would benefit by allowing the NOVO developer to change the financing method because it will result in housing units being built as soon as possible, and the affordable units will remain affordable in perpetuity. Ms. Hartman suggested that these units would be needed following the 2030 census to keep the number of affordable housing units on the SHI above the 10% threshold. Ms. Rust stated that in comparison to the MA Housing option, the monthly rent for the two-bedroom units will stay the same while under LIP the 1-bedroom is slightly higher, and that all rents are regulated under 40B requirements.

Budget Update: Free Cash, FY '27 Final Recommendations (Joint Accounts)

Jennifer Barrett, Chief Financial Officer presented the slide deck *Fiscal Year 2027 Town Government Operating Budget*.

Questions and comments yielded the following information:

Chair Howell stated that the student enrollment shift at Concord Carlisle High School significantly worked against the Town of Carlisle this year. Mr. McKennitt challenged the assertion that the projected increase to the median property tax bill would be in the range of \$1700.00 per year, while Ms. Barrett replied that the rate set will depend on local revenues, state aid and other revenues. Ms. Lafleur and the finance team will review the calculations. Ms. Barrett stated that it is too early to refinance the Concord Middle School debt, however the finance team is meeting with an advisor to evaluate if other debts can be refinanced.

Presentation: Land Use Working Group – Preliminary Recommendations

Sven Weber, Co-chair, Land Use Working Group shared and reviewed the presentation *Land Use Working Group Select Board Presentation* February 23, 2026. Judith Long, Co-chair, Land Use Working Group, attended via Zoom and was available for questions.

Questions and comments yielded the following information:

Chair Howell emphasized that it is not optional to replace or make significant improvements to the Department of Public Works (DPW) and Public Safety Facility as they do not meet current needs. Additionally, Chair Howell added that the Ripley School is a failing building. Ms. Rovelli expressed appreciation for the amount of and quality of the work of the Land Use Working Group. Chair Howell stated that the

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document is planning information only, representing possible directions and that no decisions have been made. Mr. Weber added that the plan is a phased one that will not be done all at once and that abutters to the properties prefer non-industrial use. Mr. Boehm expressed the importance of capital planning and Ms. Hartman added that it is important for the Select Board to educate the residents about the conditions of the public works and public safety buildings. Ms. Hartman shared that the Town may benefit from use of consulting services to build a roadmap for community outreach on the topic. Mr. Weber stated that municipal consolidation would free up currently held properties, which could then be sold to generate a cash flow that could be used for municipal property investments and upgrades.

Public comments were as follows:

Mark Gailus of 62 Prescott Rd. expressed concern about lack of public engagement, citing that the group has not met the responsibility of the charge. Mr. Gailus stated that the agendas are lacking sufficient detail. Mr. Gailus shared information regarding a letter from the Agricultural Committee to the Land Use Working Group regarding environmentally rich areas and habitats which are cited as under consideration for development. Mr. Gailus states that the public has the right to be informed in meeting agenda which specific properties are at risk. Mr. Gailus noted that there are two Select Board members that are also members of the Land Use Working Group who are charged with advising the Select Board and questioned whether this would allow for appropriate layers of review and judgment. Lastly, Mr. Gailus stated that selling town property creates one time income but does not consider what the town will need in reserve for future use.

Mr. Weber, Ms. Hartman, Chair Howell and Mr. Boehm expressed that public engagement opportunities will increase now that the Land Use Working Group report is available.

Stephan Bader of 7 River St. asked why the MCI Concord parcel was ruled out as a future location for public safety and why the utilization of Concord center office buildings was not being considered, citing that a Concord center location could be convenient for residents. In response, Mr. Weber stated that the future rotary reconstruction and reconfiguration are of great concern to public safety and that the current West Concord location is considered well situated. Mr. Weber also stated that resident convenience and accessibility to municipal office space will be considered.

Jennifer Salt of 123 Peter Spring Rd. lives behind the 509 Bedford St. property that is being discussed. Ms. Salt stated that the property is useable for agriculture, is home to

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endangered species and is also the location of the Reformatory Branch Trail. Ms. Salt stated that there is a responsibility to preserve the area for those who wish to visit and that it is related to the Robbins House family, the Hutchin's family, Native American history and revolutionary reenactment. Ms. Salt stated that often residents are presented with large packages at Town Meeting and are unaware of smaller items that are contained within proposals. Ms. Salt requested the proposed location of new facilities be a separate item when it comes time to vote.

Tanya Gailus of 62 Prescott Rd. stated that the work of the Land Use Working Group (LUWG) was "predetermined work" and should not have occurred without initial public input and awareness of what was being discussed and that the agendas for the LUWG are not specific enough to be compliant with Open Meeting Law. Ms. Gailus stated that in public matters the public is the stakeholder, not individual committees. Ms. Gailus noted decisions that have been made regarding Warner's Pond, that took neighborhood opinion into account.

**Status Update: MCI Master Plan Procurement, Municipal Facilities Planning
Article #12**

Ms. Zammuto shared and reviewed the slide deck *Municipal Facilities Master Plan and Road Map 2026 Town Meeting Request*. Ms. Zammuto added that the four locations that are being studied for yield analysis are the Peabody School, Ripley School, Keyes Road Campus, and the Church St. Campus.

Questions and comments yielded the following information:

Mr. McKennitt noted that municipal planning goals should be inclusive of not only housing goals but financial, business and tax revenue goals and stated that some properties may lend themselves to meeting financial goals as they are in commercial districts. Chair Howell expressed the importance of carefully considering future town property needs prior to disposing of property, noting that two of the sites being discussed are former elementary school sites. Chair Howell, Mr. Boehm and Ms. Hartman discussed the advantage that existing zoning can have in terms of the value and future use of parcels. Ms. Zammuto stated that the presentation was created in preparation for the March 10th Finance Committee hearing, where Chair Howell will be the presenter for the Select Board on Article #12. Ms. Hartman recommended that Ms. Zammuto include a sense of urgency and momentum in the tone of the presentation so that the community knows the importance of this step in the process of municipal planning. Additionally, Ms. Hartman recommended editing the 10–20-year roadmap

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timeline to a shorter timeline while Chair Howell pointed out the complexity of acquiring the parcels needed for municipal improvements. Ms. Zammuto stated that at last years Annual Town Meeting, funds were appropriated for MCI-Concord planning and that those funds are currently being utilized for the master plan and that this is an additional ask to be used for general planning across many sites. Mr. McKennitt and Mr. Howell both said that it is important for the residents to know that funds are needed for both planning for MCI Concord and for general municipal facilities planning as the two are a comingled solution to the large problem. Chair Howell and Mr. Boehm expressed that the money appropriated for planning should be spent aggressively over the next 12 months . Chair Howell stated that the planning that will be done will put the town in the best position to acquire an office building if an opportunity presents itself. Ms. Lafleur added that there are limited opportunities to bring items before the community for a vote and that appropriation of funds and acquisition of real estate are town meeting actions. Ms. Lafleur stated that there will be continued discussion on Article #12 next week.

Ms. Sandoval provided an update on the master planning for MCI Concord, stating that the request for proposals (RFP) submissions were due on February 19 and that two proposals have been received. Ms. Sandoval stated that the RFP review board has been meeting and reviewing the proposals and hopes to select a preferred consultant in the next couple of weeks. The project will kick off in early April. Chair Howell added that this project will propose a zoning amendment that would be presented at Town Meeting and a traffic circulation proposal that is amenable to the Town of Concord and the Division of Capital Asset Management and Maintenance (DCAMM.) The Select Board will continue the discussion on this topic at the March 16 meeting.

Liaison Reports

Ms. Rovelli shared that she is planning a volunteer recruitment open house for board and committee vacancies. More information will follow. Ms. Rovelli stated that there is a presentation by the Tax Relief Evaluation Task Force scheduled for April 16. Mr. Boehm shared that the Bias and Hate Incident Reporting Working Group held a focus group that was open to the public and was advertised in multiple locations. There is a second focus group being held this Sunday. Mr. Boehm requested an extension to May 1 for the Bias and Hate Incident Reporting Working Group report to be completed. This will be placed on the Consent Agenda for the next meeting. Mr. Boehm noted the information regarding the February 17th Transportation Advisory Committee meeting and the Warner's Pond Management Committee meetings can be found in his Liaison report.

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Upon a motion duly made by Ms. Hartman and seconded, it was UNANIMOUSLY **voted:**
to adjourn the meeting at 9:18 PM.

[Meeting Packet](#)

[Meeting Recording](#)

ONE-DAY LIQUOR LICENSE

APPLICATION DETAILS

Application #:	ODL-26-62928	Date Issued:		Permit #:		Date Paid:	02/05/26
Fee Payable: (\$)	0.00	Fee Paid: (\$)	75.00	Receipt #:	ODL-26-0305		

SECTION 1 - SITE INFORMATION

Name of Organization: Concord Armory

Street Name: EVERETT ST Map Block Lot: 0198

Street Number: 91 Zone: C

Unit Number: _____

On Premises: Concord Carlisle Foundation is hosting an annual fundraiser at the Armory. The event will feature a

Description of Premises: The fundraiser will take place in the main hall of the Concord Armory building.

SECTION 2 - OWNER / CORPORATION INFORMATION

Owner / Corporation Name: COMMONWEALTH OF MASSACHUSETTS

Street Number: 100 Street Name: CAMBRIDGE ST

City: BOSTON State: MA Zip Code: 02202

Telephone: _____ Email: _____

SECTION 3 - APPLICANT INFORMATION

Applicant Name: Melissa Karczewski (Concord Carlisle Foundation) Fundraiser at Concord Armory

Street Number	<u>37</u>	Street Name	<u>Main Street, Suite 3</u>		
City	<u>Concord</u>	State	<u>MA</u>	Zip Code	<u>01742</u>
Telephone number	<u></u>				
	Email <u></u>				

SECTION 4 - MAILING ADDRESS

Street Number	<u>37</u>	Street Name	<u>Main Street</u>		
City	<u>CONCORD</u>	State	<u>MA</u>	Zip Code	<u>01742</u>
Telephone	<u></u>				

SECTION 5 - HOURS OF OPERATION

To Sell: (Check One) Wines & Malts All Alcoholic

Note: Please indicate A.M. or P.M.

Day of Event	<u>04/10/26</u>	Hours of Operation	From <u>7:30pm</u>	To <u>11:30pm</u>
Activity	<u>Concord Carlisle Foundation is hosting an annual fundraiser at the Armory. The event will feature al</u>			
Approximate Number of Attendance	<u>175-200 guests</u>			

SECTION 6- DECLARATION

I do hereby certify under the pains & penalties of perjury that the information provided above is true and correct.

Date 02/03/26

(Chapter 138, Section 14. General Laws of the Commonwealth of Massachusetts)

Indicates Mandatory Field.

Note: Please check the above checkbox to submit the form

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

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

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

NAME: (please print) CONCORD 250 CORP.
 COMPANY or organization: _____
 ADDRESS: PO BOX 250 CONCORD MA
 TELEPHONE: _____
 DATE(S) APPLIED FOR: SATURDAY APRIL 11, 2026
 EVENT: PATRIOTS DAY BALL
 HOURS OF OPERATION: 6:00 - 11:00
 PREMISES TO BE LICENSED: CONCORD ARMORY
 ADDRESS OF PREMISE LICENSED: 91 EVERETT ST CONCORD

License is for the Sale of:

All Alcoholic Beverages	<input type="checkbox"/>
Wines & Malt Beverages Only	<input checked="" type="checkbox"/>
Wines Only	<input type="checkbox"/>
Malt Beverages Only	<input type="checkbox"/>

The Licensed Activity or Enterprise is:

For Profit	<input checked="" type="checkbox"/>
Non-Profit	<input type="checkbox"/>

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? 2

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. YES

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: 2/18/26
President, Concord 250 Corp



THE TOWN OF CONCORD

Office of the Town Manager Concord, Massachusetts 01742

PERMIT FOR USE OF TOWN PROPERTY

Permit Holder: HENRY DANE , CONCORD 250 CORPORATION

Event Name: PATRIOTS BALL 2016

Event Date: 2026-04-11

Event Times: 10:30 PM

Event Location: THE PATRIOTS BALL WILL BE AT ARMORY PARTICIPANTS WILL MARCH FROM ARMORY, DOWN WALDEN STREET, UP MAIN STREET TO THE FIRST PARISH CHURCH WHERE WE WILL WAIT FOR THE SAMUEL PRESCOTT RE-ENACTOR TO RIDE ON HORSE BACK FROM THE GUN HOUSE TO FIRST PARISH CHURCH TO SOUND THE ALARM

Date Issued: 2026-03-09

Authorized By: Megan Zammuto, Deputy Town Manager

Authorized Signature:

Permit Conditions

- Cleanup and Restoration:** Permit holders must restore the property to its original condition.
- Liability:** The permit holder assumes responsibility for damages or injuries.
- Permit Display:** While it is not required to carry this permit on-site, please ensure relevant parties are aware of the event approval.
- Additional Permit Conditions:** Police details required

Contact Information: For questions or changes regarding this permit, please contact Mimi Graney at mgraney@concordma.gov

CONCORD POLICE DEPARTMENT

MEMORANDUM

TO: Concord Select Board
FROM: Thomas M. Mulcahy, Chief of Police
DATE: February 12, 2026
SUBJECT: Patriots Ball April 11, 2026

This memorandum serves to formally confirm the Concord Police Department's support of and commitment to assisting with the 2026 Patriot's Ball.

The event is scheduled for April 11, 2026 at The Concord Armory, 91 Everett Street. The Patriot's Ball is a longstanding community tradition that draws significant attendance and requires coordinated planning to ensure public safety, parking management, and overall event security. As in previous years, attendees will gather at the armory prior to marching to Concord center. As part of the march, a reenactment of Samuel Prescott's historic horseback ride will take place.

The Police Department will provide appropriate, dedicated staffing and operational support to ensure:

- Safe and orderly traffic flow before, during and after the event
- Pedestrian safety in and around the venue
- Coordination with event organizers and facility representatives
- Rapid response capability should any public safety concerns arise

We will continue to work collaboratively with event organizers and relevant Town departments to ensure the event is conducted safely and professionally, while minimizing any disruption to the surrounding neighborhoods.

During planning meetings with organizers, we reviewed an incident from last year's event involving an intoxicated member of a militia group, who caused a minor disturbance. Appropriate measures have been implemented to help prevent a recurrence. This year's event will take place from 7PM-11PM, with attendance capped at 300 guests, reduced from 350 last year. The organizers will utilize marshals to assist with crowd management. Additionally, one uniformed Police officer has been requested, and will be assigned inside the venue for security, with on-duty officers providing additional support, and escorting the march into Monument Square.

Sincerely,


Thomas M. Mulcahy
Chief of Police

Town Manager Appointments with the Approval of the Select Board:

Favorable action is requested: Motion to approve Town Manager reappointments of:

- a. Andrew Kirkpatrick of 94 Sorrel Rd. to the Commission on Disability for a term to expire May 31, 2029.
- b. Nancy Frescella-Lee of 140 Walden St. to the Historical Commission for a term to expire May 31, 2029.
- c. Ellen Quackenbush of 206 Prairie St. to the Transportation Advisory Committee for a term to expire May 31, 2029.
- d. Marianna Hill of 574 Harrington Avenue to the Transportation Advisory Committee for a term to expire May 31, 2029,

V. Select Board Appointments

Favorable action is requested: Motion to approve the Select Board appointments of:

- a. Laurie O'Neill of 4 Chestnut St. to the Concord Cultural Council for a term to expire May 31, 2029.
- b. Jack Megan of 106 Southfield Rd. to the Concord Cultural Council for a term to expire May 31, 2029.
- c. Reappointment of Julie Reed of 116 Monument St. to the Board of Registrars for a term to expire March 31, 2029.

Chair's Report

Town Manager's Report



Town Manager's Monthly Project Report

March 2026

Tracking progress across key operational and capital priorities.

Executive Overview – March 2026



- **Capital delivery entering execution**
14 projects are currently in construction or implementation, with **7 additional projects** advancing through procurement and final design.
- **Public safety systems advancing**
Advanced Life Support training and state licensing preparation continued while the Computer Aided Dispatch and Records Management System procurement process remains active.
- **Technology systems stabilizing**
Core municipal technology upgrades are advancing toward implementation and operational rollout.
- **FY27 coordination underway**
Early planning work has begun to support Fiscal Year 2027 capital, climate, and transportation priorities.



Infrastructure

- Baker Ave Culvert nearing close-out
- Smart water meter installation advancing townwide
- Water & Wastewater planning and negotiations ongoing



Public Safety

- Advance Life Saver training progressing
- Computer aided dispatch/Records management system procurement active
- System configuration underway



Energy & Municipal Systems

- Time of Day Electric Rate rollout underway
- Cell infrastructure expansion planning underway
- Facilities capital planning progressing



Sustainability & Climate

- Climate Action Plan update advancing
- Transportation analysis underway

Execution and validation efforts are advancing across departments, with FY27 capital and policy coordination underway.

Project Spotlight - March 2026

Smart Water Meter Installation
Funding Source: Enterprise Fund
Phase: Execution

Project Overview:

Installation of advanced smart water meters across Concord to modernize the water system, improve leak detection, and provide more accurate water usage data for residents and the Town of Concord.

Status:

- Systemwide smart meter installation program underway
- 17 percent of meters installed as of March 2026
- Field crews actively replacing legacy meters across service areas

Next Steps:

- Continue phased meter installations town-wide
- Expand data integration and system monitoring capabilities
- Projected completion: Fall 2027



Water & Sewer staff replacing legacy meter



Smart water meter installation



Advanced meter hardware installation



Active Projects by Phase



56
Reported
Projects

9
Reporting
Departments

11
Cross-Dept
Initiatives

19
Projects in
Execution

Planning
Early-stage assessment & feasibility

Execution
Active implementation underway

Design
Procurement & consultant coordination

Closeout
Final inspection & reconciliation

Priority Projects & Initiatives

Select Board and Town Manager priority initiatives



Department	Project	Project Lead	Funding	Phase	Next Milestone
Concord Municipal Light Plant	Advanced Metering	Jason Bulger (Director CMLP)	\$3.0M (Enterprise)	Closeout	Performance validation
CMLP	Time-of-Day Rollout	Jason Bulger (Director CMLP)	\$100K (Special)	Execution	Customer launch
CMLP	Middle School Solar Project	Jason Bulger (Director CMLP)	TBD (Enterprise Debt Authorization/ Grant)	On Hold	Determine revised project scope with school district
Concord Public Works / Water & Sewer	Smart Water Meter Installation ★	Darin LaFalam (Water & Sewer Superintendent)	\$1.6M (Enterprise)	Execution	Continued installation/system integration
CPW / Engineering	Baker Ave Culvert Repair	Steve Dookran (Town Engineer)	\$800K (ARPA)	Closeout	Final inspection
CPW	MCI Wastewater Treatment	Alan Cathcart (CPW Director)	State Earmark	Planning	Advance negotiations with EPA and state partners
Public Safety / Fire Department	Basic Life Saver to Advanced Life Saver Certification	Chief Whitney (Fire Chief)	\$1.2M (FEMA Grant)	Execution	State certification
Public Safety / Police Department	Computer Aided Dispatch/Record Management	Chief Mulcahy (Police Chief)	\$350K (GF, Capital)	Execution	Vendor configuration and system deployment

DEPARTMENT	PROJECT	LEAD	FUNDING	PHASE	NEXT MILESTONE
Town Manager's Office / Sustainability	Climate Action & Resilience	Shannon McAndrew (Management Specialist)	\$75K (GF, Capital)	Planning	Finalization of community outreach plan
Information Technology / MinuteMan Media	Town House Hearing Room AV Upgrade	Julie Manoogian (Media Manager)	MMN Revolving	Planning	Finalize project scope and cost estimates
Community Development	Assabet River Bridge Trail	Elizabeth Hughes (Town Planner)	GF, Capital	Planning	Submit FY27 federal Community Project Funding request
PW / Facilities	Municipal Building Capital Improvements (FY26)	Russell Karlstad (Facilities Manager)	\$3.1M (GF, Capital & Operating)	Execution	Complete next phase of municipal facility upgrades
Community Development / PW	Comprehensive Transportation Strategy	Alyssa Sandoval (CDD Director) Steve Dookran (Town Engineer)	Study funded thru ARPA	Planning	Identify priority corridors and implementation framework
Community Development / PW	MCI Concord Master Plan and Rezoning	Alyssa Sandoval (CDD Director) Alan Cathcart (CPW Director)	State Earmark, Special Warrant Article (Free Cash)	Planning	Complete master planning framework and draft rezoning concepts

Concord Municipal Light Plant (CMLP)



Department Manager:
Jason Bulger, Director

CMLP Project Links

[Advanced Metering System Project | Concord, MA](#)

[Time-of-Day Electric Rates | Concord, MA](#)

Department Highlights (March FY26)

- Advanced Metering project completed; performance validation underway.
- Time-of-Day electric rates launch April 1, with May billing implementation.
- Solar expansion and Middle School solar projects advancing through review, permitting, and funding coordination.

Key Items / Operational Notes

- Monitoring regional energy markets and grid reliability conditions. Market trends continue to inform procurement and operational planning.
- Customer outreach and billing readiness supporting upcoming rate changes. Staff preparing systems and communications ahead of implementation.
- Coordination with Town departments on energy planning and infrastructure needs. Collaboration supports long-term system reliability and modernization.

Concord Municipal Light Plant (CMLP)



Advanced Metering Rollout:

- System-wide meter replacement complete.
- Network validation and vendor compliance confirmation underway.
- Data integration and operational performance monitoring continuing during closeout.



Select Board Goals:  Infrastructure •  Financial Sustainability •  Climate Action

Time-of-Day Rate Rollout:

- Implementation advancing toward April 2026 go-live with May billing integration.
- Customer communications and billing coordination underway.
- Operational readiness and system monitoring continuing ahead of activation.



Select Board Goals:  Climate Action •  Financial Sustainability

Project Timelines (FY26–FY27)

Advanced Metering Rollout

- Deployment complete (FY26)
- System validation (current)
- Close-out transition (FY26–FY27)

Time-of-Day Rates

- Rate design complete (FY26)
- Customer communications (current)
- Rate activation and monitoring (FY26–FY27)

Advanced metering validation and Time-of-Day customer readiness efforts are converging in FY26, positioning CMLP for stable rate activation and operational close-out transitioning into FY27

Concord Public Works (CPW)



Department Manager:
Alan Cathcart, Director

Link to site

[Concord Public Works Site](#)

Department Highlights (Mar FY26)

- Major roadway and infrastructure projects advancing, including Baker Avenue Culvert repair, Main/Baker/Cottage intersection design, and town-wide paving coordination.
- Water and sewer infrastructure initiatives progressing, including Silver Hill Phase 2 work, wastewater capacity evaluation at MCI, and smart water meter implementation.
- Facilities and long-range planning efforts underway, including Peabody School reuse analysis, new CPW facility planning, and municipal building capital improvements.

Key Items / Operational Notes

- FY26 capital program continues advancing high-priority roadway, drainage, and infrastructure improvements across multiple project sites.
- Coordination with utilities, contractors, and regulatory partners remains critical to maintaining construction sequencing and project timelines.
- Department leadership continuing long-range planning for facilities, asset management, and capital investment prioritization.




Concord Public Works-Engineering

Steve Dookran, Town Engineer






Roadway Stabilization & Pavement Management

- Town-wide paving program advancing under the FY26 capital plan.
- Silver Hill Phase 2 drainage and roadway repairs underway following completion of water main installation.
- Baker Avenue culvert repair progressing toward substantial completion.

Select Board Goals:  Infrastructure  Financial Sustainability
 Transportation

Pedestrian & Intersection Safety

- Main/Baker/Cottage intersection improvements advancing through engineering design.
- Pedestrian accessibility and safety improvements incorporated into roadway projects.
- Sidewalk and ADA access upgrades included within capital roadway work.

Select Board Goals:  Infrastructure  Transportation  Climate Action

Project Timelines (FY26–FY27)

Roadway Stabilization

- Baker Ave culvert repair (FY26)
- Silver Hill Phase 2 roadway repairs (current)
- Town-wide paving program continuation (FY26–FY27)

Pedestrian & Bicycle Safety

- Main/Baker/Cottage intersection design (FY26)
- Corridor safety integration (current)
- Intersection improvements implementation (FY26–FY27)

FY26 engineering projects are advancing roadway rehabilitation, drainage improvements, and intersection safety projects under the Town's capital infrastructure program.




Concord Public Works – Facilities

Russ Karlstad, Manager



Building Repairs & Renovations

- FY26 capital funding supporting priority municipal building repairs and system upgrades.
- Facility projects advancing, including 133/135 Keyes roof renovation and Public Safety Building roof replacement planning.
- Long-range facility planning underway, including Peabody School reuse analysis and new CPW facility planning.

Select Board Goals:  Infrastructure •  Financial Sustainability •  Governance

Harvey Wheeler Community Center – Kitchen Feasibility

- Feasibility study evaluating kitchen replacement or expansion options.
- Consultant coordination and operational needs assessment underway.
- Study findings will inform scope and potential capital planning.

Select Board Goals:  Infrastructure •  Governance

Project Timelines (FY26–FY27)

Building Repairs & Renovations

- Capital allocation approved (FY26)
- Repair and improvement projects underway (current)
- System stabilization and modernization planning (FY26–FY27)

Harvey Wheeler – Kitchen Study

- Feasibility scope defined (FY26)
- Consultant analysis underway (current)
- Recommendation and capital integration (FY26–FY27)

FY26 facilities investments are addressing priority municipal building repairs while advancing long-term facility planning and capital modernization efforts.




Concord Public Works-Highway & Grounds

Aaron Miklosko, Highway & Grounds Superintendent



Town-Wide Paving & Roadway Maintenance

- Highway division supporting the FY26 town-wide paving and roadway repair program.
- Coordination with Engineering on pavement preparation and roadway stabilization.
- Ongoing roadway maintenance operations supporting capital construction work.

Select Board Goals:  Infrastructure •  Transportation •  Public Safety

250th Anniversary Tree Program

- Planting 250 public shade trees across Concord as part of Concord250.
- Coordination with schools and community partners to identify planting locations.
- Supports long-term canopy growth and climate resilience.

Select Board Goals:  Infrastructure •  Climate Action

Project Timelines (FY26–FY27)

Roadway Maintenance & Paving

- Roadway preparation and support work (current)
- Town-wide paving program implementation (FY26)
- Multi-year roadway maintenance continuation (FY26–FY27)

250th Tree Program

- Tree planting coordination (FY26)
- Community planting efforts underway (current)
- Canopy growth and maintenance planning (FY26–FY27)

FY26 Highway & Grounds operations are supporting roadway maintenance, capital paving implementation, and community tree planting initiatives across Concord.

Concord Public Works- Water & Sewer




Darin LaFalam: Water & Sewer Superintendent



Smart Water Meter Installation

- System-wide smart meter installation underway.
- Early implementation and system coordination underway.
- Preparing for broader system integration and operational validation.






Select Board Goals:  Infrastructure •  Financial Sustainability •  Climate Action

Wastewater System Planning & Capacity Coordination MCI

- Ongoing assessment of wastewater capacity and system performance.
- Coordination with MCI Wastewater Treatment Facility.
- Technical review and future capital sequencing underway.



Select Board Goals:  Infrastructure •  Climate Action •  Governance

Project Timelines (FY26–FY27)

Smart Water Meter

- Project initiation complete (FY26)
- Early implementation (current)
- System integration and validation (FY26–FY27)

Wastewater Capacity Planning MCI

- Planning and coordination (current)
- Technical review and agency discussions
- Future capital planning and sequencing

FY26 smart meter implementation and wastewater capacity planning are advancing system modernization and informing future capital investment decisions.

Information Technology (IT)



Department Manager:

Jeff Weiner, Chief Information Officer

Link to site

[IT Department Homepage](#)

Department Highlights (March FY26)

- Enterprise systems transitioning from deployment to validation and operational stabilization.
- Security and access control modernization advancing, including Town House security and card access upgrades.
- Public meeting technology enhancements progressing, including AV upgrades and electronic voting implementation.

Key Items / Operational Notes

- Portfolio coordination focused on sequencing capital, public safety, and governance initiatives.
- Legacy system upgrades and server decommissioning underway to reduce security and operational risk.
- Cloud migration evaluations in progress, including phone system and security platform modernization.

Information Technology (IT)



Enterprise Systems Stabilization

- Post-deployment validation and performance testing underway.
- Operational handoff and system readiness coordination in progress.
- Cross-department integration with Finance, Public Safety, and CPW.

Select Board Goals:  Infrastructure •  Governance

Cybersecurity & Network Resilience

- Ongoing monitoring and access control alignment.
- System hardening across departments.
- Risk mitigation protocols supporting digital service expansion.

Select Board Goals:  Governance •  Public Safety

Project Timelines (FY26–FY27)

Town House Security & AV

- Scope refinement and sequencing (FY26)
- Integration planning (FY26)
- Implementation coordination (FY27)

Enterprise Systems

- Validation and testing (current)
- Cross-department optimization (FY26)
- Operational stabilization (FY27)

IT stabilization and security coordination are supporting execution-phase projects while strengthening long-term infrastructure resilience.

Public Safety

Fire Department/ Police Department



Department Manager:

Thomas Mulcahy, Chief of Police
Brian Whitney, Fire Chief

Public Safety Links

[Concord Fire Department Homepage](#)

[Concord Police Homepage](#)

Department Highlights (March FY26)

- Fire Department progressing transition from Basic Life Saver certification to in-house Advanced Life Saver paramedic service.
- Police Computer aided dispatch/Records management system modernization supporting dispatch efficiency and data management.
- Ongoing equipment upgrades and capital planning supporting long-term public safety readiness.

Key Items / Operational Notes

- FEMA-funded Advanced life saver training advancing; four paramedics certified, additional certifications projected through December 2026.
- Office of Emergency Medical Services licensing application planned with target Advanced Life Saver service launch July 2026.
- Early-stage planning continues for future Police and Fire facility modernization; no active capital project advanced currently.

Concord Public Safety- Concord PD & FD



BLS to ALS Transition

- FEMA-funded paramedic training advancing; 4 completed training; 3 currently certified.
- 9 paramedics projected certified by July 2026; full cohort completion by December 2026.
- OEMS licensing application planned; grant extension request anticipated May 2026.

Select Board Goals: 🚑 Public Safety • 🛠️ Service Reliability • 💰 Financial Sustainability

CAD/RMS System Upgrade

- Police CAD and Records Management modernization advancing.
- Vendor procurement and implementation activities underway.
- System configuration and training progressing FY26–FY27.

Select Board Goals: 🚓 Public Safety • 📊 Strategic Planning • 🏛️ Governance

Project Timelines (FY26–FY27)

BLS to ALS Transition

- Personnel training underway (FY26)
- ALS certification milestone (July 2026)
- Full program completion (December 2026)

CAD/RMS Upgrade

- Needs assessment complete
- Procurement and implementation (FY26)
- Configuration and training (FY26–FY27)

Town Manger's Office (TMO)



Links

Department Managers:

Kerry A. Lafleur Town Manager

Megan J. Zammuto, Deputy Town Manager

[Wireless Coverage \(Cell Service\) Link](#)

[Town Manager Homepage](#)

Department Highlights (March FY26)

- Advancement of priority Select Board initiatives including climate resilience and infrastructure coordination.
- Cross-department coordination supporting capital sequencing, regulatory actions, and FY26 implementation milestones.
- FY27 planning efforts underway to position key capital and policy actions for decision.

Key Items / Operational Notes

- **Cell Infrastructure Initiatives:** Concord Center and Route 2 projects advancing; Phase 1 environmental review underway for Route 2 with site visit planned this spring. Lease negotiations for the Umbrella site now focused on electrical service configuration for the building.
- **Climate Action & Resilience:** Stakeholder mapping underway. Finalizing community outreach plan.
- **FY27 Strategic Planning:** Operating and capital recommendations finalized for FY27 planning.
- **Governance Support:** Ongoing Select Board coordination and goal tracking.

Town Manger's Office (TMO)



Climate Action & Resilience Plan Update

- Stakeholder mapping underway. Finalizing community outreach plan, with 8 stakeholder interviews and 2 full community workshops planned throughout the project.
- Project webpage content under development.
- Identifying draft actions for the updated plan through communications with the Climate Action Committee and Town Staff. Action identification to continue with stakeholder interviews.

Select Board Goals:  Sustainability & Climate •  Infrastructure

Cell Infrastructure Improvement

- Landfill Tower – working with Wireless Edge Towers on environmental information required prior to permitting.
- Umbrella – working on final lease details with Verizon.
- West Concord – Postponed

Select Board Goals:  Infrastructure •  Public Safety

Project Timelines (FY26–FY27)

Climate Action & Resilience

- Progress assessment of the 2020 CARP near complete
- Finalizing stakeholder mapping and community outreach plan
- Draft list of actions for the updated plan to be reviewed in April

Cell Infrastructure

- Landfill Tower – environmental review underway; permitting anticipated 2026
- Umbrella – lease finalization targeted March 2026
- West Concord – Postponed until FY27

FY26 technical evaluation and coordination efforts are advancing implementation pathways for climate and wireless infrastructure initiatives.

Community Development

Planning, Building, Health, Natural Resources



Department Manager:
Alyssa Sandoval, Director

[Assabet River Multi-use Bridge & Trail](#)

[Comprehensive-Transportation-Strategy](#)

[Reimagine MCI Concord](#)

Department Highlights (March FY26)

- Continued advancement of long-range land use and redevelopment initiatives, including coordination on Reimagine MCI Concord and regional planning efforts.
- Ongoing zoning, transportation, and mobility analysis supporting the Comprehensive Transportation Strategy and multi-year capital planning.
- Cross-department coordination advancing housing, redevelopment, and FY27 policy priorities.

Key Items / Operational Notes

- **Assabet River Multi-Use Bridge & Trail:** Interagency coordination and planning activities progressing; advancing permitting and design sequencing discussions.
- **Comprehensive Transportation Strategy:** Data analysis and stakeholder engagement underway to inform mobility improvements and long-term infrastructure investment priorities.
- **Reimagine MCI Concord:** Master planning and interdepartmental coordination underway to evaluate redevelopment and long-term land use opportunities.

Community Development



Comprehensive Transportation Strategy

- Data collection and baseline traffic analysis completed.
- Scenario development and corridor evaluation underway.
- Coordination with CPW to align mobility planning with capital priorities.



Select Board Goals: 🚶 Mobility & Safety • 🏛️ Governance • ⚡ Infrastructure

Assabet River Multi-Use Bridge & Trail

- Preliminary planning and interagency coordination underway.
- Project advanced for FY27 federal Community Project Funding submission with Congressional support.
- Budget preparation and funding strategy development underway for FY27, including anticipated TIP funding.



Select Board Goals: 🌱 Sustainability & Climate • 🏛️ Governance • ⚡ Infrastructure

Project Timelines (FY26–FY27)

Comprehensive Transportation Strategy

- Baseline traffic analysis complete (FY26)
- Scenario evaluation and corridor modeling (current)
- Planning framework and priority corridor identification (FY27)

Assabet River Multi-Use Bridge & Trail

- Planning and coordination initiated (FY26)
- Scope and partner refinement (current)
- Budget submission and capital coordination (FY27)

Planning and coordination efforts in FY26 are positioning Community Development initiatives for informed capital and policy decisions in FY27.

Library & Human Services – Project Overview



Strategic Plan FY2027–FY2029

The Concord Free Public Library is developing a new Strategic Plan for FY2027–FY2029 to guide the Library’s vision, services, and priorities over a three-year period.

Key Notes:

- Community engagement process begins July 1, 2026
- Plan will be adopted by the Library Committee to guide future operations

Select Board Goals:

 Service Delivery •  Governance •  Community Engagement

Beede Center Roof Restoration & Replacement

Targeted restoration and replacement of roof areas at the Beede Center, consistent with architectural drawings, to reduce installation costs while providing a full 20-year warranty.

Key Notes:

- Architect validating low bidder and preparing contract materials
- Contract award: February 9, 2026
- Estimated Construction Completion: 2027 subject to weather

Select Board Goals:

 Facilities & Asset Management •  Community Wellbeing

Construction and system upgrades remain active across CPW priorities, while early planning continues for long-term wastewater capacity needs.

Closing out February FY26



Execution

- Public safety modernization progressed with ALS training milestones and CAD/RMS procurement advancing.
- Capital and infrastructure projects continued through active design, permitting, and implementation phases.
- Facilities and asset investments advanced with Beede Center roof contract award and preparation for construction.

Planning & Sequencing

- Climate Action consultant kickoff and early coordination activities initiated.
- Transportation strategy baseline analysis completed, advancing corridor evaluation and scenario development.
- Early FY27 capital coordination discussions underway across departments.

Oversight & Reporting

- Cross-department milestone tracking and dependency monitoring continued through the monthly project reporting framework.
- Key infrastructure and policy initiatives elevated for Select Board awareness and coordination.
- ADA Transition Plan update advancing; Disability Commission public survey launched to gather accessibility feedback.

Strategic Planning Watchlist

Public Safety / CPW Facilities Long-Term Space Needs – internal feasibility review ongoing

Disciplined execution and structured planning remain central to advancing Concord's infrastructure and policy priorities.

Presentation and Vote: To Authorize In-Person Early Voting on March 26th and 27th for the March 31, 2026 Annual Town Election

Presenter: Kaari Tari, Town Clerk

Favorable action is requested: Motion to authorize In -Person Early Voting on March 26th and 27th for the March 31, 2026 Town Election.



Town Clerk's Office
22 Monument Square
Concord, MA 01742

Memo

To: Select Board
Cc: Kerry Lafleur, Town Manager
Board of Registrars
From: Kaari Mai Tari
Date: March 4, 2026
Re: Recommendation to offer Early In-person Voting for the 2026 Annual Town Election

[General Law - Part I, Title VIII, Chapter 54, Section 25B](#) (b)(8)(c)(1-3) allows for Early In-person voting in local elections upon recommendation of at least 50% of the Board of Registrars and approval of the Select Board (printed on reverse of this memo).

The Board of Registrars met on Monday, March 2, 2026 and voted unanimously to recommend that the Select Board vote on the following motion:

To authorize early in-person voting for the March 31, 2026 election be held on the following days/times:

Thursday, March 26: 8:30 am – 4:30 pm

Friday, March 27: 8:30 am – 3:00 pm

With this vote, the calendar of opportunity for voting would be as described below:

Key Dates

March 9	Ballots begin to be mailed to voters who have applied for ballots by mail; Absentee In-Person Voting is available during normal business hours and continues until Monday, March 30 at 12 PM.
March 24	Vote by Mail application deadline — 5:00 PM
March 26	In-Person Early Voting – 8:30 AM – 4:30 PM
March 27	In-Person Early Voting – 8:30 AM – 3:00 PM
March 28	Special Saturday Absentee in-person voting Hours — 10 AM–12 PM
March 30	Absentee In-Person Voting ends at 12 PM (noon)
March 31	Election Day — Polls open 7 AM–8 PM

Enabling Legislation: [General Law - Part I, Title VIII, Chapter 54, Section 25B](#) (b)(8)(c)(1-3).

(c)(1) The select board, board of selectmen, town council or city council of each city and town may vote to authorize early in-person voting for any other city or town preliminary or election not included in subsection (b). Such vote may only be taken after a request from not less than 50 percent of the registrars of the city or town recommending in-person early voting; provided, however, that such vote shall occur not less than 5 business days prior to the proposed beginning of early voting.

(2) As part of the vote to allow early in-person voting under this subsection, a city or town shall set the early voting period to begin not sooner than 17 days before the preliminary or election and end not later than 2 business days preceding the preliminary or election.

(3) Early voting under this subsection shall be conducted during the usual business hours of the city or town clerk unless different hours are set as part of the vote to allow early in-person voting, including any weekend hours.

Update: Middle School Building Project

Presenters: Dr. Laurie Hunter, Superintendent of Schools, Gail Dowd, Co-Chair – Community Volunteer, Concord Middle School (CMS) Building Committee

Concord Middle School

Select Board Meeting

March 16, 2026



Concord Middle School

Select Board Meeting

March 16, 2026



**THE ELLEN GARRISON BUILDING at
CONCORD MIDDLE SCHOOL**

923 OLD MARLBORO ROAD



THE ELLEN GARRISON BUILDING AT CONCORD MIDDLE SCHOOL



Dr. Laurie Hunter
Superintendent

Justin Cameron
Principal

Dedicated 2025



Kerry Lafleur
Town Manager

Gail Dowd
Project Manager

School Committee

Alexa Anderson
Andrew Herchek
Tracey Marano
Carrie Rankin
Cynthia Rainey

School Building Committee

Alexa Anderson
Susan Bates
Court Booth
Heather Bout
Frank Cannon
Peter Fischelis
Dawn Guarriello
Andrew Herchek

Mark Howell
Tim Hult
Matt Johnson
Pat Nelson
Charlie Parker
Chris Popov
Matt Root
Stephen Stasheski

Student Building Committee

Leo Almeida
Felix Barber
Heba Belyazid
Juniper Conti
Hailey Guarriello
Dylan Harrison-Smith

Ayden Henry
Nella James
Luke Leonardo
Anaya Rana
Alex Miles Ryan
Miles Sperber

LiRo-Hill
Owner's Project Manager

SMMA
Architect
Ewing Cole
Associate Architect

CTA Construction Managers
General Contractor



May 2023



September 2023



December 2023



March 2024



September 2024



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February 2025



SEASON'S READINGS



February 2025



February 2025



April 2025



June 2025



August 2025

Site Photographs: Playing Fields



October 2025

Site Photographs: Court & Playground



October 2025

Site Photographs: Visitors & Courts



October 2025

Construction Status

Phase 1 - New Building

- Commissioning Deficiency Log in Progress, meeting weekly to close remaining items
- Minimal punch list items remaining

Phase 2 - Abatement/Demo & Fields

- Grass growing
- Established snow fence to protect grass from foot traffic
- Playground and basketball court turned over to the school for their use

Additional Items

- Working with MMMN to build out recording capability in Library – equipment has been ordered.

Financial Update

- Project team is working through close out documentation and finalizing payments and change orders with CTA, subcontractors and professional firms
- Anticipate final cost of project to be available late spring/early summer upon close out of all punch list items
- Expectation is to rescind unused portions of the debt authorizations at next years Annual Town Meeting – due to timing final figures are not available for this year

Financial Snapshot as of March 10, 2026

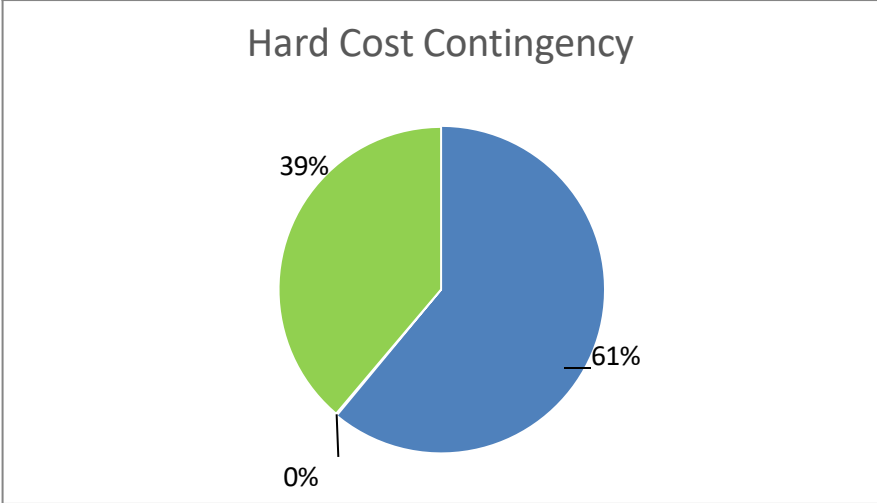
Approved Project Budget:	\$110,016,000*
First Authorization	\$102,816,000
Second Authorization	7,200,000
Payments to date	\$102,777,054.87
Less other funding sources **	<u>(715,025.29)</u>
Total Payments against Authorization	\$102,062,029.58

* Figures exclude Feasibility of \$1.5 million that was under a separate authorization

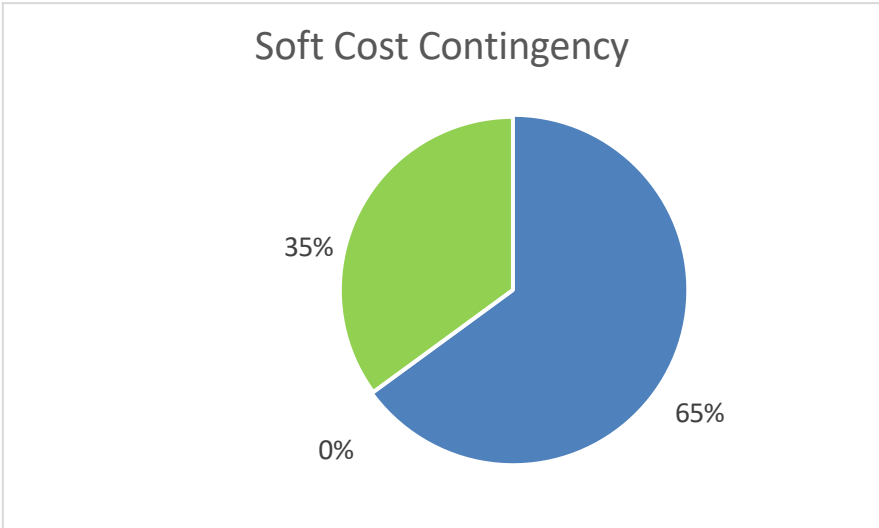
** Reflects CPC funding (\$250,000), irrigation funding (\$384,303.14) and expenses borne by CMLP (\$80,722.15)

Town of Concord Contingency Usage Chart

January 31, 2026



Budget	\$	4,591,197
Used / Committed	\$	2,801,740
Forecasted	\$	7,643
Remaining	\$	1,781,814



Budget	\$	877,394
Used / Committed	\$	569,921
Forecasted	\$	-
Remaining	\$	307,473

Update: Concord Middle School Solar Project

Presenter: Jason Bulger, Director, Municipal Light Plant



Memo: Middle School Solar Project Update

To: Select Board

From: Jason Bulger, Director CMLP

Date: 03/16/2026

We are making steady progress on the Middle School solar project. The School Administration and CMLP recently teamed up on a \$1.4 million MassCEC Green School Works grant application, with an award announcement expected this May. Lines of communication are open between both parties, and the School Committee has taken an active role in trying to help facilitate project success.

Our primary goal is to have the system operational by the end of 2026. To meet that timeline, we are looking at all available options, including the potential for a third-party Power Purchase Agreement (PPA). Partnering with a solar developer through a PPA would allow us to scale up quickly without overextending staff as well as hedge against financial uncertainty from tariffs, expiring Investment Tax Credits, and global events. By locking in a PPA, it would secure predictable project costs and avoid an unexpected shock to ratepayers.

That being said, CMLP continues to explore an ownership model, and is planning a refresh to the RFP that was previously issued to ensure that we have options and can act quickly depending on the result of the grant application and discussions with developers. Attached to this memo is a summary of the different financing options and their implications for a project like this.

CMLP already provides monthly updates to the Light Board on this project, and we have also committed to regular updates to the School Committee.

We remain committed to supporting the Town's goal of adding more in-town solar and are also working to expand the Landfill solar from 1.5MW (AC) to 4.0MW (AC) by utilizing energy storage to prevent solar saturation issues that have resulted from such widespread solar adoption in Concord.

We will provide another update once the grant status is confirmed. Please let us know if you have any questions in the meantime.

Jason Bulger
Director, CMLP

Solar Procurement Comparison for Middle School Project

Procurement Model	Ownership & Maintenance	Funding Source	Financial Impact on District	Feasibility Status
1. School-Owned (Direct)	District owns and maintains.	Capital Budget / Bonds / Grants	Highest ROI. 100% bill offset.	NOT FEASIBLE: No funding authorization from Town Meeting.
2. CMLP-Owned (Utility Asset)	CMLP owns and maintains as a grid asset.	CMLP Capital / Ratepayer Funds / Grants	Neutral. School receives net-zero designation with no capital expenditure.	FEASIBLE: Uses existing site license.
3. Utility-Led PPA (Performance)	Developer owns/maintains; sells power to CMLP.	Private Third-Party Capital	Neutral. CMLP buys power at fixed rate lower than retail. Risk sits with developer.	FEASIBLE: Simplifies staff burden.
4. School Solar Lease (Equipment)	Developer owns; School rents hardware.	Private Third-Party Capital	Cash-Flow Positive. Fixed monthly rent is offset by 100% of energy savings. Predictable monthly budget.	FEASIBLE: \$0 upfront cost but may carry some risk if production is lower than expected.

Key Decision Factors for the School Committee

- **Financial Barrier:** Because the district lacks a Town Meeting appropriation, Model 4 is the only path for the school to see some direct budget relief without capital outlay. Model 3 is the fastest path for construction if the goal is town-wide rate stabilization and meeting climate goals.
- **Operational Risk:** In Models 2, 3, and 4, the school has zero maintenance responsibility. If a component fails, the utility (CMLP) or the private developer is contractually obligated to fix it.
- **Grant Opportunity:** The Green School Works Grant (MassCEC) would be applied to a blend of Models 1 and 2, whereby CMLP would take responsibility for construction and maintenance, and each party would receive a financial benefit proportional to their contribution to the project.
- **Interconnection:** Since the building is only one year old and solar-ready, the technical hurdles for CMLP to connect the system are minimal, regardless of which legal model is chosen.
- **Original Design:** The project was originally designed with Model 2.
- **Likely Outcomes:** The project is most likely to move forward as a blend of Models 1 and 2 (if the grant is received), or as Model 2 or 3 (if the grant is not received).

Presentation and Discussion: Bruce Freeman Rail Trail/ Concord Middle School Connector Path

Presenter: Phil Posner, Member, Transportation Advisory Committee

The Possibility of Connection

Creating a Safe Route to
Concord Middle School via the
Bruce Freeman Rail Trail



CMS-BFRT Connector Volunteer Group

Jeff Alls, landscape architect, Willard parent

Joshua Burgel, landscape architect, CCHS parent

Jeff Collins, ecologist, parent of graduates

Shelly Karlin, CMS PTG Sustainability Co-lead, CMS parent

Phil Posner, TAC member, Bike to School Concord organizer

Kristin Tolfree, Mothers Out Front, Thoreau and CMS parent



Community Endorsements

School

- Concord School Committee
- CMS PTG (fiscal sponsor)
- Special Education Parent Advisory Council (SEPAC)

Town

- Concord Transportation Advisory Committee
- Concord Climate Action Committee
- Concord Trails Committee

Advocacy & Community Groups

- Friends of the Bruce Freeman Rail Trail
- Mothers Out Front
- Concord MOBility (formerly Concord Bikes)
- Bike to School - Concord (SRTS)
- Monsters in the Basement Bike Club



Existing Features



Old Marlboro Rd.

Bruce Freeman Rail Trail

Upper Campus & Fields

Old Sanborn Path

Lower Fields

Goat Path

Woods Path



Why Improve the Paths?

Promote Active Transportation / Every Trip Counts

Safety

Health & Accessibility

Lower Emissions

Less Pollution

Dropoff / pickup (4 trips) - 1 mile from CMS generates over 3.5 lbs. of CO₂ each day (635 lb./school year) avg ICE vehicle.

Students w/i 1 mile, with exceptions, do not qualify for school bus service.

In addition to CO₂, ICE vehicles release chemicals with negative health impacts (Particulates, Nitrogen Oxides, VOCs, Benzene, etc.)





Why Improve the Paths?

Promote *Active Transportation* in the Community

Alignment with Concord's Civic Values

- ❖ "Create safe, cost-effective walking and biking connections between key pedestrian and bicycle paths/trails to improve mobility around Concord."

- *Envision Concord – Bridge to 2030 (2018), Section 4.5, Goal #3, p. 177*

- ❖ **Concord's Climate Action and Resiliency Plan (2020) seeks to make biking and walking safer, more convenient, and carbon-free mobility options.**

Success metrics for the plan include:

- Increase in miles of sidewalks/walking paths
- Increase in miles of bike lanes/paths
- Increased connectivity of existing walking and biking corridors

- *Concord's Climate Action & Resiliency Plan (2020), p. 58, 59*

Conceptual Design



1 BFR TO FIELD

110' X 8' WIDE @ 4.5% SLOPE - ASPHALT PATH

2 FIELD

475' GRASS OR ASPHALT PATH

3 OLD CAR(future)

175' ASPHALT OR STONE DUST PATH, MINIMAL GRADING

4 HILLSIDE (future)

520'X6' WIDE @ 4.5% SLOPE DESIGNED TO AVOID TREES & PROVIDE OBSERVATION LANDINGS. ORGANIC LOCK OR ASPHALT, MAY NEED EDGING OF LOGS OR STONES

Total length estimate: 1,280ft, or ~¼ mile

JOHN BOWEN
 PROJECT MANAGER
 JTB@BOWENENGINEERING.COM
 404.525.1111
 1000 W. BOWEN BLVD
 SUITE 100
 ATLANTA, GA 30328

Concept: Middle School / Bruce Freeman Rail Trail Connection in the East Atlanta District
 221 East Memorial Ave, Decatur, GA

NO.	REVISION	DATE

SHEET
 CONCEPT PLAN
 MSH-TRAIL-001
 L100

DATE: 11/11/2014
 TIME: 10:00 AM
 SCALE: 1" = 500'

Estimated Budget

Consultant/Designer <ul style="list-style-type: none">• Schematic plan for review and iteration with school leadership and community• 75%, 90%, 100% plans reviewed and approved by school leadership	\$25,000
Supplemental Survey & Permitting <ul style="list-style-type: none">• extend existing CMS topographical survey to BFRT• survey tree locations on slope• Wetlands and other permits	\$10,000
Design Contingency	\$5,000
Procurement Support (bidding services)	\$2,500
Construction Administration	\$7,500
Construction	\$400,000
Five Years Maintenance	\$15,000
Total	\$465,000



Funding

Source	Amount	Notes
CMS PTG & Community Fundraising	\$35,000	Committed
Friends of the BFRT	\$40,000	Committed
2018 Trails Appropriation	\$75,000	Open deadline, discretionary
Community Preservation Act Funds (CPA)	\$100,000+	September 2026 application deadline
Safe Routes to School Infrastructure Grant <i>or</i> Mass Trails Grant <i>or</i> Shared Streets/Places	\$100,000+	October 2026 (no local match) <i>or</i> January 2027 <i>or</i> November 2026 application deadline (local match required)
Additional Community Fundraising	...	Ongoing



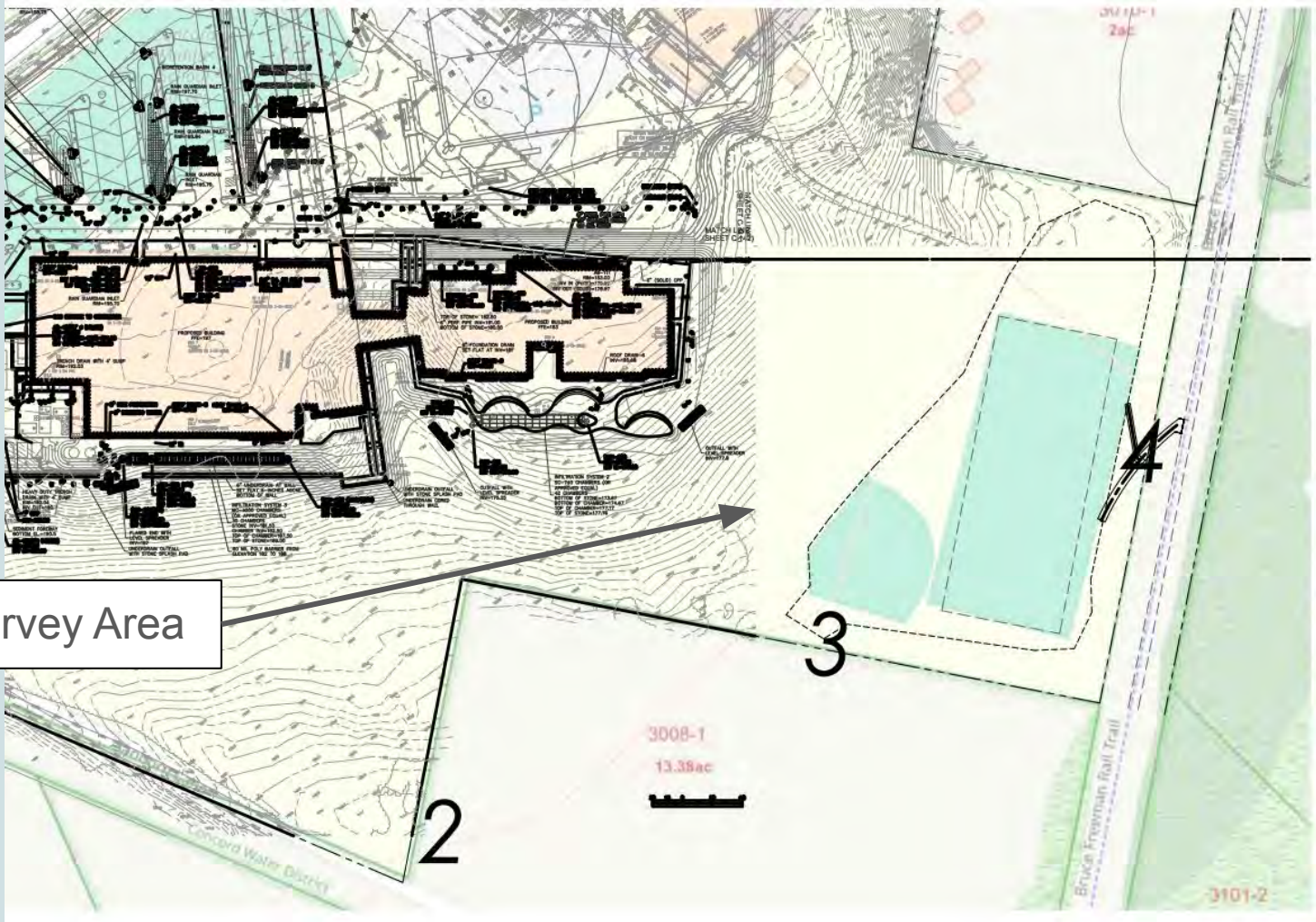
SelectBoard Action Items:

- ❑ Please vote to support the Connector Project to create an accessible path between the Concord Middle School and the Bruce Freeman Rail Trail.
- ❑ Please vote to support our request for a waiver of permitting fees.
- ❑ Please vote to support our request for Town staff to allocate time and previously approved trail funding for this project.

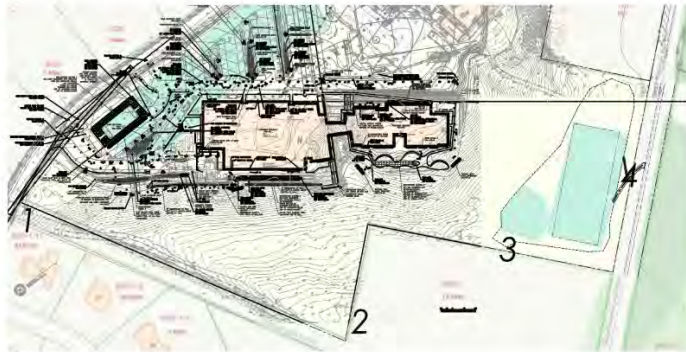
Thank you



Supplemental Documentation

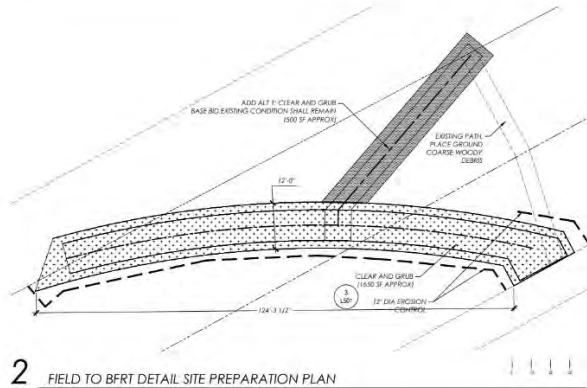


Supplemental Survey Area

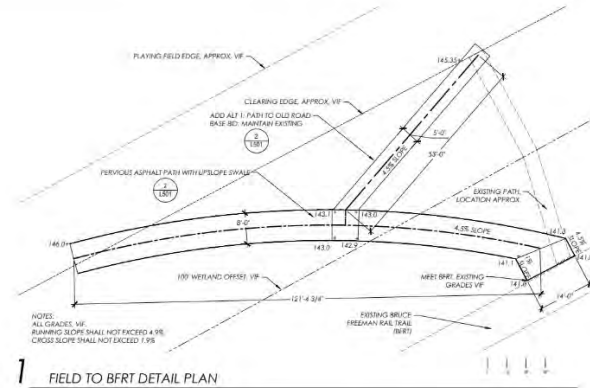


3 SITE ACCESS AND MAINTENANCE OF TRAFFIC

- 1 Gate of Old Marlboro Rd to Town of Concord Well Access Road
- 2 Approximate path toward field, may require pruning and stabilizing
- 3 Field opening, site access along field perimeter. Protect turf. Restore ruts or other turf damage.
- 4 Project location. Shall have protective fencing and construction signage.



2 FIELD TO BFT DETAIL SITE PREPARATION PLAN



1 FIELD TO BFT DETAIL PLAN

PROJECT NO. 2024-001
 DATE: 10/20/2024
 DRAWN BY: [Name]
 CHECKED BY: [Name]

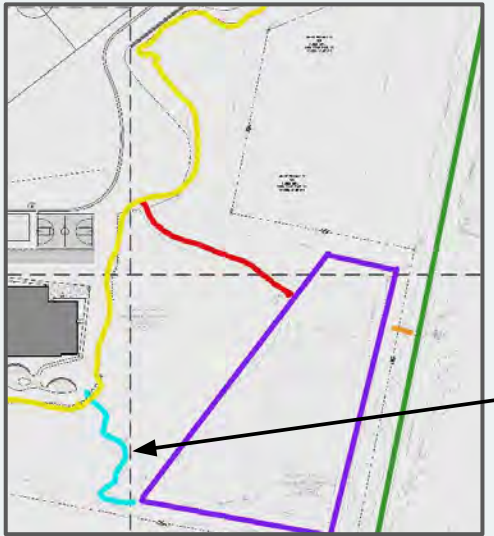
Concord Middle School / Village of Freeman Rd
 1221 Old Marlboro Rd, CONCORD, MA

Site Plan
 BFT to Lower Field
 12

Existing Path Conditions

Woods Path

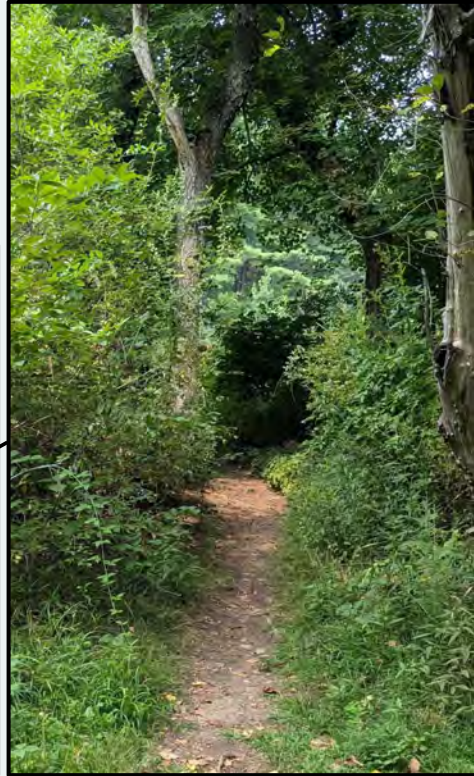
- Steep grade in places
- Eroded, unstable surface
- Incomplete connection



Existing Path Conditions

Goat Path

- Overgrown w/poison ivy & brambles
- Eroded, bumpy, rooty, steep
- Uninviting and difficult to locate



Analogue 1: White Pond Restroom and Walkway Accessibility Project (2018)



Elements

- 40' elevation change (CMS = ~30')
- Accessible design that integrates natural setting
- Minimal tree removal

Costs

- Restrooms \$404,000
- Walkway & Access \$235,000
- Landwork \$126,500

Analogue 2: BFRT Access at Powdermill Road



- 24' elevation change (CMS = ~30')
- ADA / Accessible design that integrates the natural setting
- Provides connectivity to neighborhood/sidewalk



Town Meeting Business:

-Vote: Recommendations on Annual Town Meeting Warrant Articles

-Assign Speakers for Articles

Presenter: Mark Howell, Chair

Status Update: MCI Concord Steering Committee Draft Charge

Presenters: Mark Howell, Chair

MCI Master Plan Committee Charge Outline

The goal of the Master Plan committee is to build on the achievements of the MCI Advisory Board in public engagement to support the development of a MCI site Master Plan and associated zoning regulations package.

The Select Board and the State Division of Capital Asset Management and Maintenance (DCAMM) are developing a Memorandum of Agreement (MOA) that will provide guidance for the collaboration between the Town and the State. The MCI Master Plan Committee will ensure that the elements of the MOA are incorporated into the MCI Master Plan.

The Town of Concord is hiring a consultant to lead the Master Plan and Zoning process. The Master Plan Committee will be a resource and guide to the Community Development Director who is the overall leader of this engagement. They will work with the selected firm as they develop the Master Plan for MCI Concord and the supporting zoning regulations. They will provide regular updates to the Select Board.

As with the MCI Visioning work done in 2025, the Master Planning Committee will work closely with this consultant on public engagement and outreach with the community. The requirements for this planning include incorporating the recommendations of the Land Use Working Group and the traffic and transportation strategy work by Public Works into the Master Plan, extending and adding to the concepts and goals outlined in the Vision report.

Developing the Junction Village site, and housing in general, remain a high priority for the MCI site. The Master Plan Committee should ensure that the resulting plan incorporates specific achievable results in both these areas. The Land Use Working Group's recommendation for the Department of Public Works facilities specifically prioritizes MCI Concord as the solution for new public works facility. The MCI Master Plan Committee will work with the DCAMM and the Select Board to incorporate these key elements into the MCI Master Plan.

Coordination with the other facility planning efforts related to municipal consolidation and public safety initiatives under the land-use working groups recommendations will be made through Town Staff and the Select Board.

The MCI Master Plan Committee will promote the Town's general interest as well as the MCI site's specific interests working with Town Staff and MassDOT on the rotary redesign and traffic circulation in the vicinity of West Concord, Baker Ave and Route 2.

Select Board Review and Discussion March 16, 2026

Logistics:

- The Committee will be formed in April 2026.
- The Charge will terminate at the end of 2027 or when MCI zoning is approved, whichever comes first.
- Subject to Open Meeting Law
- Liaisons with Public Works Commission, Planning Board
- Expertise - residential and commercial development in Concord, Architecture, zoning, Traffic and transportation

Membership 5 - Reps/experience

- Select Board
- LUWG or PWC
- MCI AB Public Engagement
- MCI Land Use
- Planning Board

Update and Vote: Payment in Lieu of Taxes (PILOT) Plan Initiative Reset of Plan's Action

Presenter: Kerry Lafleur, Town Manager



Town of Concord

Town Manager's Office
22 Monument Square
P.O. Box 535
Concord, Massachusetts 01742-0535
Tel: (978) 318-3000
Fax: (978) 318-3093

To: Select Board

From: Kerry A. Lafleur, Town Manager

Date: March 16, 2026

Subject: Payment in Lieu of Taxes (PILOT) Initiative- Program Update and Reset Implementation Plan

Background

In November 2024, the Select Board adopted a Payment in Lieu of Taxes (PILOT) Policy establishing the Town's framework for seeking voluntary contributions from tax-exempt institutions located in Concord. The policy recognizes both the important role that nonprofit organizations play in the Concord community and the need to distribute the cost of municipal services as fairly as possible among those who benefit from them.

Following adoption of the policy, staff conducted an analysis of the Town's tax-exempt properties and prepared a PILOT Action Plan and presentation, both of which were reviewed by the Select Board in January 2025. That work identified approximately \$465 million in tax-exempt property value across nonprofit organizations that could potentially participate in voluntary PILOT agreements, with educational institutions and healthcare providers representing the largest share of this tax-exempt property base.

The analytical work completed in 2025 remains a strong foundation for the Town's PILOT program.

Program Status

While the analysis and policy framework for the PILOT program were completed in early 2025, implementation did not proceed as originally anticipated.

During 2025, staff resources were appropriately focused on a number of higher-priority financial management initiatives, including stabilization of financial operations, addressing internal control issues, supporting the audit process, and preparing the Town's annual operating budget.

As a result, the outreach and implementation phase of the PILOT program was paused. The purpose of this memorandum is to outline a reset implementation approach that allows the Town to move forward with the initiative in a realistic manner which recognizes capacity limitations.

Implementation Reset

Rather than initiating simultaneous outreach to a large number of nonprofit organizations, staff recommend a phased implementation strategy focused initially on a small number of high-value institutions.

Based on the property analysis previously completed, the initial outreach phase would focus primarily on:

- Major educational institutions located in Concord; and
- Emerson Hospital.

These organizations represent a significant portion of the Town's tax-exempt property value and therefore provide an appropriate starting point for voluntary participation discussions.

Beginning with a limited number of institutions will allow the Town to:

- Establish constructive partnerships with key organizations;
- Develop model agreement structures; and
- Refine the program before expanding outreach to additional nonprofit entities.

Proposed Timeline

The following timeline reflects a realistic implementation schedule that accounts for current staff priorities and the upcoming Annual Town Meeting.

Now / Mid- June 2026: Program reset and preparation

- Update program materials and analysis as needed;
- Identify priority outreach institutions; and
- Prepare outreach materials.

Late- June/ Summer 2026: Leadership outreach

- Initiate conversations with leadership of major institutions;
- Provide information regarding the Town's PILOT policy and program goals; and
- Explore potential partnership opportunities.

Fall 2026/ Spring 2027: Agreement development

- Develop voluntary PILOT agreements where appropriate; and
- Work with Town Counsel regarding agreement structure.

FY28 and Beyond: Program expansion

- Expand outreach to additional nonprofit organizations; and
- Continue to report program progress to the Select Board.

Contribution Framework

Consistent with the Select Board's adopted policy, PILOT contributions are voluntary and may be structured based on:

- A percentage of the property tax that would otherwise be owed;
- The financial capacity of the institution; and
- Community benefits already provided by the organization.

The policy references 25% of the otherwise applicable property tax value as a general benchmark for voluntary contributions, although actual agreements may vary depending on the circumstances of each institution.

Next Steps

Staff will begin preparing outreach materials and identifying initial institutions for engagement. Staff will also keep the Select Board informed as outreach discussions progress and will return to the Board with updates as appropriate.

Over time, several residents have expressed an interest in supporting the Town's efforts related to the PILOT initiative. As part of the program reset, staff will reach out to those individuals to confirm their continued interest. Staff also welcome input from others in the community, including Select Board members, who may wish to offer perspectives as the program moves forward.

The Town's goal is to develop a PILOT program that strengthens long-term partnerships with Concord's nonprofit community while helping support the municipal services that benefit the entire community.

Please let me know if the Select Board has any questions or would like additional information as this work moves forward.



PILOT Initiative: Program Reset & Implementation Plan

Select Board Update – March 16, 2026



Program Foundation:

In November 2024, the Select Board adopted a **Payment in Lieu of Taxes (PILOT) Policy** establishing a framework for voluntary contributions from tax-exempt institutions located in Concord.

The policy recognizes that:

- Non-profit institutions contribute significantly to the cultural, educational, and healthcare fabric of the community.
- Municipal services such as police, fire, public works, and infrastructure benefit all institutions operating in the Town.
- A voluntary PILOT program can help distribute the cost of these services more equitably while maintaining strong partnerships with the non-profit sector.

Following policy adoption, Town staff conducted an analysis of Concord's tax-exempt properties and identified potential opportunities for voluntary PILOT participation.



Current Program Status

Significant groundwork has already been completed

- Comprehensive analysis of Concord’s tax-exempt properties
- Identification of **\$465.8M** in **targeted tax-exempt property value** across nonprofit institutions
- Development of potential contribution scenarios
- Preparation of outreach materials and engagement strategy

This analysis demonstrated that educational institutions and healthcare providers represent the largest potential participants in the program.

Category	Parcels	Total Value	Percent of Total	Taxed at 100%	Taxed at 25%
Educational Institutions	56	\$ 258,629,900	55.52%	\$ 3,204,424	\$ 801,106
Land	83	\$ 53,241,900	11.43%	\$ 659,667	\$ 164,917
Cultural/ Community	14	\$ 43,537,300	9.35%	\$ 539,427	\$ 134,857
Healthcare Organizations	3	\$ 41,535,100	8.92%	\$ 514,620	\$ 128,655
Religious Organizations	12	\$ 36,778,300	7.90%	\$ 455,683	\$ 113,921
Conservation Organizations	21	\$ 28,121,700	6.04%	\$ 348,428	\$ 87,107
Housing	3	\$ 3,971,900	0.85%	\$ 49,212	\$ 12,303
Totals:	192	\$465,816,100	100.00%	\$5,771,461	\$1,442,865

Reason for Program Reset

While the analytical work supporting the PILOT initiative was completed in early 2025, implementation did not proceed as originally anticipated

During 2025, Town staff appropriately focused on:

- Stabilizing financial operations
- Supporting audit completion
- Managing the annual budget process

Given these priorities and staff capacity constraints, the implementation phase of the PILOT program was paused.

The current Action Plan resets the program timeline and provides a realistic pathway for moving forward.

Strategic Approach Going Forward

Rather than conducting simultaneous outreach to a large number of organizations, the Town will pursue a phased engagement strategy.

The initial phase will focus on a **small number of high-value institutions**, including:

- Major educational institutions
- Emerson Hospital

These institutions represent a significant portion of Concord’s tax-exempt property value and provide an appropriate starting point for voluntary participation discussions.

This approach allows the Town to:

- Establish constructive partnerships
- Develop model agreements
- Refine the program before expanding participation

Implementation Phases

Phase 1 – Program Reset and Preparation

Now / Mid-June 2026

Activities:

- Update program materials and financial analysis
- Confirm priority outreach institutions
- Develop outreach strategy consistent with Town policy
- Brief the Select Board on the reset plan

Phase 2 – Leadership Outreach

Late June / Summer 2026

Activities:

- Initiate conversations with leadership of major institutions
- Provide information regarding the Town's PILOT policy and program goals
- Explore potential partnership opportunities
- Gather feedback from institutions

Phase 3 – Agreement Development

Fall 2026 / Spring 2027

Activities:

- Develop voluntary PILOT agreements
- Work with Town Counsel on agreement structure
- Determine contribution levels and potential escalation mechanisms

Phase 4 – Program Expansion

FY28 and Beyond

Activities:

- Expand outreach to additional nonprofit institutions
- Incorporate lessons learned from initial agreements
- Continue to report program progress to the Select Board



Governance and Administration

Implementation of the PILOT program will involve collaboration across several Town departments

Function	Responsibility
Town Manager	Program leadership and institutional outreach
Finance Department	Financial analysis and program monitoring
Assessing Division	Property valuation data
Town Counsel	Agreement development and legal review
Select Board	Policy oversight

Reporting and Transparency

Staff will provide periodic updates to the Select Board regarding:

- Outreach activities
- Institutional participation
- PILOT contributions received
- Opportunities for program expansion

Maintaining transparency with both participating institutions and the community will be an important element of the program's success.

PILOT Initiative: Program Reset & Implementation Plan



Long-Term Program Goals

The PILOT program seeks to:

- Support long-term municipal financial sustainability
- Maintain strong partnerships with Concord's nonprofit community
- Distribute the cost of municipal services more equitably
- Preserve the Town's ability to provide high-quality services



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 existence of tax-exempt, 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.

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 and dependent upon. 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.

JANUARY 27, 2025

TOWN OF CONCORD PILOT PROGRAM
ACTION PLAN



Town of Concord PILOT Program – Action Plan

Prepared for the Select Board Meeting on January 27, 2025

Prepared by: Amanda Moore, Executive Assistant to the Town Manager

Presented by: Anthony Ansaldi, Finance Director

Date: January 27, 2025

Executive Summary

The Town of Concord's **Payment in Lieu of Taxes (PILOT) program** aims to foster collaboration with tax-exempt property owners by encouraging voluntary financial contributions to support essential municipal services. The Select Board formally adopted the PILOT policy on **November 18, 2024**, to promote **fairness, fiscal responsibility, and transparency** while ensuring equitable contributions from non-taxable entities that benefit from Town services.

In **Fiscal Year 2024**, Concord received ~\$1,352,723 in PILOT contributions, primarily from government entities. However, approximately **43% of the Town's non-taxable land, valued at \$465.8 million**, remains non-contributing. This action plan presents a structured approach to increasing participation among high-value tax-exempt organizations, with a focus on **educational and healthcare institutions**, which constitute a significant portion of the non-taxable properties.

Key Steps in the Action Plan

The Town's approach focuses on the following strategic actions:

- **Targeted Outreach:** Initiating direct communication with non-profits in **April 2025** to encourage voluntary participation.
- **Financial Planning:** Establishing contribution expectations based on assessed property values to promote fiscal equity.
- **Stakeholder Collaboration:** Engaging organizations to develop mutually beneficial agreements that align with their financial capacities.
- **Performance Monitoring:** Implementing regular tracking and evaluation to measure program effectiveness and ensure transparency.

This document provides an update on the progress of the PILOT program, details next steps for stakeholder engagement, and outlines the Town's efforts to achieve financial sustainability through expanded participation.

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Introduction

Background

Concord is home to a substantial number of tax-exempt properties, including educational institutions, healthcare facilities, and religious organizations. While these organizations provide significant value to the community, they also rely on essential municipal services such as public safety, road maintenance, and emergency response.

To address the financial impact of providing these services, the Select Board adopted the Payment in Lieu of Taxes (PILOT) policy on November 18, 2024, establishing a voluntary framework for tax-exempt organizations to contribute to municipal operations. This initiative aims to promote fairness, fiscal responsibility, and collaboration between the Town and its non-profit partners.

Purpose of the PILOT Program

The Concord PILOT program is designed to achieve the following:

1. Ensure fairness in cost-sharing by encouraging tax-exempt properties to contribute to municipal services they benefit from.
2. Strengthen the Town's financial sustainability by diversifying revenue sources.
3. Promote positive relationships and mutual benefits between the Town and non-profits.

Goals and Objectives

The PILOT program supports Concord's financial and community objectives through the following key goals:

1. **Enhancing Fiscal Sustainability:**
 - o Generate stable, supplemental revenue to support essential town services, such as public safety, infrastructure maintenance, and emergency response.
 - o Diversify Concord's revenue streams to reduce reliance on residential taxpayers and ensure long-term financial health.
2. **Promoting Equity:**
 - o Establish fair and consistent contribution expectations based on non-profits' use of municipal services and their financial capacity.
 - o Ensure all tax-exempt property owners have an opportunity to contribute in a way that aligns with their mission and financial ability.
3. **Foster Partnerships:**
 - o Engage with tax-exempt organizations to create mutually beneficial agreements that recognize their contributions to the community.
 - o Encourage open dialogue to develop sustainable relationships that support the Town's financial needs while respecting the non-profits' missions.
4. **Increasing Transparency:**
 - o Provide regular updates to the Select Board, non-profits, and the public through clear financial reporting and progress tracking.
 - o Ensure the PILOT process is open and accessible, fostering trust and community support.

Scope of the PILOT Program

The Concord PILOT program applies to a diverse range of tax-exempt properties and aims to ensure fair contributions while maintaining the Town's financial stability.

1. Applicable Properties:

- **Educational Institutions:** Private schools and colleges.
- **Healthcare Providers:** Hospitals and medical facilities.
- **Religious Organizations:** Churches, temples, and other places of worship.
- **Cultural and Charitable Organizations:** Non-profits focused on arts, history, conservation, and community services.

2. Exclusions:

- Town-owned properties, federal and state properties, and entities already under PILOT agreements.

3. Voluntary Nature of PILOT Agreements:

- Participation in the Concord PILOT program does not establish any legal tax liability for tax-exempt organizations. Contributions are voluntary and do not alter the property's tax-exempt status under Massachusetts law.

Current Status

The Town has made significant progress in refining the list of tax-exempt properties, prioritizing outreach efforts, and preparing for targeted engagement. The following key areas outline the status of the PILOT program implementation.

Tax Exempt Property Data Review:

A review was conducted of all of Concord's tax-exempt properties within Concord, identifying a total exempt property value of **\$1,138,529,400**, categorized across various sectors such as educational institutions, healthcare organizations, and charitable entities. This analysis serves as the foundation for targeted outreach and contribution discussions.

For a complete breakdown of all tax-exempt properties, refer to **Appendix A: Summary of All Tax-Exempt Properties**.

Existing PILOT Contributions:

Currently, the Town receives approximately **\$1,352,723** in annual PILOT contributions from the following sources:

1. **State-Owned Properties:** \$872,561
2. **Federal Government Properties:** \$3,529
3. **Local Agreements:**
 - **Concord Municipal Light Plant (CMLP):** ~\$450,000
 - **Concord Housing Authority:** \$26,633.41

These agreements provide a foundational revenue stream but present significant opportunities for further engagement with other tax-exempt organizations that do not currently participate in the PILOT program.

Excluded Properties:

Certain properties are excluded from the PILOT program, either due to their existing contribution agreements or their ineligibility under the current policy. Excluded properties include:

1. **Town-Owned Properties:** Municipally owned facilities and land.
2. **State and Federal Properties:** Contributions already established through PILOT agreements.
3. **Concord Housing Authority and CMLP:** Existing local agreements in place.

Targeted Properties for PILOT Outreach:

After excluding properties that are already contributing or ineligible, the Town has identified a total exempt property value of approximately **\$465.8 million** across key sectors, including:

1. **Educational Institutions**
2. **Healthcare Organizations**
3. **Religious and Charitable Organizations**

For a category-specific breakdown of targeted properties, refer to **Appendix B: Targeted Non-Profit Properties**.

Prioritization of Outreach Targets:

To maximize the effectiveness of the PILOT program, the Town has established the following prioritization criteria to guide outreach efforts:

1. **Total Assessed Value:** Properties with the highest assessed values will be prioritized to maximize potential contributions.
2. **Institutional Significance:** Outreach will focus on institutions with a strong community presence and reliance on Town services, particularly educational and healthcare organizations.
3. **Potential Willingness to Participate:** Organizations with a history of collaboration or prior engagement with the Town will be approached first.

The initial outreach phase will prioritize **educational and healthcare institutions**, which collectively represent **70% of the targeted exempt property value**.

Preparation for Outreach:

The Town is preparing to initiate communication with targeted non-profits in **April 2025**, encouraging voluntary participation and providing informational materials on the PILOT program.

Key outreach efforts include:

1. Development of introductory letters outlining program benefits and expectations.
2. Scheduling informational meetings to address stakeholder questions and concerns.
3. Implementing a follow-up strategy to ensure sustained engagement.

The outreach plan will be executed in phases, with initial contact focusing on high-value and high-impact institutions, ensuring efficient use of resources and maximizing participation.

Financial Impact Analysis

The financial impact of the PILOT program is assessed based on the total assessed values of targeted non-profit properties and their potential contribution levels under various participation scenarios. This analysis focuses on high-value properties, particularly educational institutions and healthcare facilities, which represent a substantial portion of Concord's non-taxable land.

Projected Contribution Scenarios

To estimate the potential financial benefits, various contribution scenarios have been developed based on a percentage of the assessed property values. These estimates help guide expectations for voluntary contributions from tax-exempt organizations.

The table below outlines potential revenue under 10%, 25%, and 50% contribution scenarios. For a detailed property listing, refer to **Appendix C: All Exempt Properties**.

Organization	Assessed Value	100 %	50%	25%	10%
Middlesex School	\$90,243,200	\$1,118,113	\$559,057	\$279,528	\$111,811
Emerson Hospital	\$41,535,100	\$514,620	\$257,310	\$128,655	\$51,462
Concord Academy	\$77,152,800	\$955,923	\$477,962	\$238,981	\$95,592
Other NFPs	\$256,885,000	\$3,182,805	\$1,591,403	\$795,701	\$318,281
Total	\$465,816,100	\$5,770,386	\$2,885,193	\$1,442,596	\$577,038

Key Takeaways from Financial Analysis

1. **Significant Revenue Potential:**
 - o If all targeted non-profit organizations contributed at a 10% rate, the Town could potentially generate **\$577,098** in additional revenue.
 - o A 25% contribution could yield **\$1,442,745**, and a 50% contribution could result in **\$2,885,489**, providing substantial financial support for municipal services such as public safety, infrastructure, and community programs.
2. **Concentration of High-Value Institutions:**
 - o Middlesex School, Concord Academy, and Emerson Hospital represent the largest individual opportunities for contributions, accounting for **\$209 million** in assessed value and potential contributions of over **\$1.04 million** at a 25% rate.
 - o These three institutions alone contribute nearly **45%** of the total assessed value of targeted properties, making them a focal point for outreach efforts.
3. **Diverse Contribution Potential from Other Non-Profits:**
 - o Non-profit properties outside the top three institutions, collectively valued at **\$256.89 million**, present a significant opportunity, accounting for **55%** of the total targeted tax-exempt properties.
 - o A strategic, phased outreach approach could secure meaningful contributions from a broad range of organizations.
4. **Revenue Diversification for Financial Stability:**
 - o PILOT contributions can provide an alternative revenue source to reduce financial pressure on residential taxpayers.

- Equitably distributing contributions across tax-exempt entities can enhance the Town's fiscal sustainability while maintaining essential services.
- 5. Challenges of Voluntary Participation:**
- Although the potential financial impact is significant, securing participation will require:
 - Effective stakeholder engagement with clear messaging on mutual benefits.
 - Flexible contribution structures tailored to organizational capacities.
 - Transparent communication to build trust and commitment among participants.
- 6. Next Steps for Financial Planning:**
- The Town should prioritize targeted outreach to high-value institutions while simultaneously engaging with smaller non-profits to maximize participation and equity.
 - Ongoing tracking and reporting will ensure transparency and facilitate future financial planning decisions.

Implementation Plan & Key Considerations

Implementation Roadmap

The successful execution of the PILOT program will be carried out in a phased approach, focusing on strategic outreach, agreement development, and ongoing monitoring. The following roadmap outlines key actions and responsibilities across designated timeframes:

- 1. Phase 1: Outreach Preparation (FY25 Q3: Jan–Mar)**
 - Draft and finalize outreach materials, including letters and informational packets tailored to different types of tax-exempt organizations.
 - Identify key stakeholders and assign outreach responsibilities across relevant Town departments.
 - Develop FAQs and supporting documents to address common concerns and ensure clarity on the program's voluntary nature.
 - Establish a dedicated PILOT program webpage to centralize information and submission portals.
- 2. Phase 2: Initial Communication (FY25 Q4: April–June)**
 - Send outreach letters to targeted organizations, providing details about the PILOT policy and expected next steps.
 - Conduct informational sessions with stakeholders to foster dialogue and address concerns.
 - Launch an online submission portal to facilitate voluntary participation and streamline communication.
- 3. Phase 3: Agreement Execution and Monitoring (FY26 Onward)**
 - Facilitate negotiations and finalize tailored PILOT agreements with participating organizations.
 - Implement tracking mechanisms to monitor contributions and measure program success.
 - Provide quarterly progress updates to the Select Board and publish key insights for public transparency.
 - Establish an annual review process to assess program effectiveness and identify opportunities for improvement.

Strategic Considerations for Success

To ensure successful implementation of the PILOT program, the following strategic considerations should be carefully managed:

- 1. Legal Compliance and Voluntary Nature:**
 - Ensure compliance with Massachusetts General Law (M.G.L. Chapter 59, Section 5) while maintaining the voluntary framework of the program.
 - Develop legally sound agreement templates that clearly define the scope of contributions and protect the Town's interests while fostering goodwill with participating organizations.
- 2. Financial Sustainability and Contribution Expectations:**
 - Align financial contributions with the Town's municipal service costs to support long-term fiscal sustainability.
 - Balance expectations by considering non-profits' financial capacities while maintaining equitable contribution levels.
- 3. Stakeholder Engagement and Participation Barriers:**
 - Foster trust through proactive communication and engagement to build cooperative relationships with non-profits.
 - Address potential barriers to participation by highlighting the mutual benefits of the program, such as enhanced community services and goodwill.
 - Manage public expectations by providing clear messaging regarding the voluntary nature of the PILOT program.
- 4. Program Flexibility and Agreement Customization:**
 - Customize PILOT agreements to accommodate the unique financial situations of different non-profits.
 - Maintain consistency across agreements while allowing flexibility in contribution structures to encourage participation.
- 5. Ongoing Monitoring and Reporting:**
 - Establish regular review cycles to track the program's effectiveness and adjust outreach and contribution strategies as needed.
 - Provide periodic reports to the Select Board and the public to ensure transparency and accountability, fostering continued support and trust in the program.
 - Leverage data analytics to assess trends, forecast future participation, and identify areas for improvement.

Roles & Responsibilities

Successful implementation of the PILOT program requires collaboration across departments with clearly defined responsibilities:

Program Oversight & Administration

- 1. Finance Director:**
 - Leads the overall implementation of the PILOT program.
 - Manages financial planning, tracking, and reporting of contributions.
 - Serves as the primary point of contact for non-profit organizations.
- 2. Town Manager's Office:**
 - Ensures the PILOT program aligns with town policies and strategic priorities.

- Facilitates stakeholder engagement, providing leadership in outreach efforts.
- Coordinates interdepartmental collaboration and communication.

Operational Execution

1. Assessing Division:

- Manages property valuation data to ensure accurate assessments for outreach planning.
- Assists in identifying targeted properties based on valuation and categorization criteria.
- Provides ongoing data support for financial projections and reporting.

2. Legal Counsel:

- Drafts and reviews PILOT agreements to ensure compliance with Massachusetts law and Town policies.
- Advises on potential legal risks and assists in the negotiation of agreements.
- Ensures agreements are legally sound and aligned with voluntary contribution frameworks.

Accountability & Reporting:

1. Select Board:

- Provides oversight, policy approvals, and strategic direction for the PILOT program.
- Reviews progress reports and offers guidance on engagement strategies.
- Ensures public transparency and maintains community trust in the program.

2. Finance Team:

- Monitors contribution levels and tracks payment schedules.
- Prepares periodic financial reports for the Select Board and public review.
- Provides financial analysis to support decision-making and future program adjustments
- Select Board: Provides oversight and policy approvals.
- Finance Team: Monitors contribution levels and prepares reports.

Conclusion

The Town of Concord remains **committed to fostering strong partnerships** with tax-exempt organizations to achieve a fair and sustainable approach to municipal funding. Through the PILOT program, the Town aims to balance financial responsibility with community collaboration, ensuring that non-profits contribute equitably while continuing to thrive within the community.

This action plan provides a clear roadmap for sustainable engagement, fiscal responsibility, and long-term partnership development. Moving forward, the Town will focus on:

1. **Prioritizing engagement** with high-value institutions, such as educational and healthcare organizations.
2. **Executing tailored agreements** that align with the financial capabilities of participating non-profits.
3. **Maintaining transparent communication** with stakeholders through regular updates and reporting mechanisms.

By implementing the outlined steps and fostering a cooperative approach, the PILOT program will contribute to Concord's long-term financial stability while supporting the valuable contributions of the Town's non-profit community.

Appendix A: Summary of All Tax-Exempt Properties

Category	Parcel	Land Value	Building Value	Total Value	%	Taxed at 100%	Taxed at 25%
Town	291	\$203,524,500	\$222,669,400	\$426,193,900	37%	\$5,280,542	\$1,320,136
Educational Institutions	56	\$101,665,900	\$156,964,000	\$258,629,900	23%	\$3,204,424	\$801,106
State	58	\$85,696,400	\$48,265,700	\$133,962,100	12%	\$1,659,790	\$414,948
Federal	78	\$61,442,800	\$18,057,600	\$79,500,400	7%	\$985,010	\$246,252
Land	83	\$53,234,200	\$7,700	\$53,241,900	5%	\$659,667	\$164,917
Cultural/Community	14	\$14,887,200	\$28,650,100	\$43,537,300	4%	\$539,427	\$134,857
Healthcare Organizations	3	\$2,825,800	\$38,709,300	\$41,535,100	4%	\$514,620	\$128,655
Housing	29	\$16,073,700	\$20,955,100	\$37,028,800	3%	\$458,787	\$114,697
Religious Organizations	12	\$9,848,100	\$26,930,200	\$36,778,300	3%	\$455,683	\$113,921
Conservation Organizations	21	\$21,524,000	\$6,597,700	\$28,121,700	2%	\$348,428	\$87,107
Total	645	\$2,825,800	\$567,806,800	\$1,138,529,400	100%	\$14,106,379	\$3,526,595

Appendix B: Targeted Non-Profit Properties

Category	Parcels	Land Value	Building Value	Total Value	Perce	Taxed at 100%	Taxed at 25%
Educational Institutions	56	\$101,665,900	\$156,964,000	\$258,629,900	56%	\$3,204,424	\$801,106
Land	83	\$53,234,200	\$7,700	\$53,241,900	11%	\$659,667	\$164,917
Cultural/Community	14	\$14,887,200	\$28,650,100	\$43,537,300	9%	\$539,427	\$134,857
Healthcare Organizations	3	\$2,825,800	\$38,709,300	\$41,535,100	9%	\$514,620	\$128,655
Religious Organizations	12	\$9,848,100	\$26,930,200	\$36,778,300	8%	\$455,683	\$113,921
Conservation Organizations	21	\$21,524,000	\$6,597,700	\$28,121,700	6%	\$348,428	\$87,107
Housing	3	\$2,306,000	\$1,665,900	\$3,971,900	1%	\$49,212	\$12,303
Total	192	\$2,306,000	\$259,524,900	\$465,816,100	100%	\$5,771,461	\$1,442,865

Appendix C: All Exempt Properties

Category	Parcels	Land Value	Building Value	Total Value	%	Tax 100%	Taxed at 25%
Town	291	\$ 203,524,500	\$ 222,669,400	\$ 426,193,900	37%	\$ 5,280,542	\$ 1,320,136
Concord Free Public Library Corp	1	\$ 495,700	\$ 1,412,100	\$ 1,907,800	0%	\$ 23,638	\$ 5,909
Concord Free Public Library Corporation	1	\$ 1,157,400	\$ 10,349,600	\$ 11,507,000	1%	\$ 142,572	\$ 35,643
Concord Public Schools	9	\$ 37,602,500	\$ 120,138,500	\$ 157,741,000	14%	\$ 1,954,411	\$ 488,603
Concord-Carlisle Regional School	1	\$ 7,594,600	\$ 56,237,500	\$ 63,832,100	6%	\$ 790,880	\$ 197,720
Town Of Concord	277	\$ 153,899,700	\$ 34,529,700	\$ 188,429,400	17%	\$ 2,334,640	\$ 583,660
Town Of Concord	2	\$ 2,774,600	\$ 2,000	\$ 2,776,600	0%	\$ 34,402	\$ 8,601
Educational Institutions	56	\$ 101,665,900	\$ 156,964,000	\$ 258,629,900	23%	\$ 3,204,424	\$ 801,106
Concord Academy	6	\$ 30,811,700	\$ 46,341,100	\$ 77,152,800	7%	\$ 955,923	\$ 238,981
Concord Children's Center Inc	1	\$ 642,200	\$ 2,350,200	\$ 2,992,400	0%	\$ 37,076	\$ 9,269
Concord-Assabet School Inc.	1	\$ 1,023,800	\$ 3,464,000	\$ 4,487,800	0%	\$ 55,604	\$ 13,901
Fenn School	11	\$ 11,182,000	\$ 14,425,500	\$ 25,607,500	2%	\$ 317,277	\$ 79,319
Middlesex School	4	\$ 11,571,600	\$ 78,671,600	\$ 90,243,200	8%	\$ 1,118,113	\$ 279,528
Nashoba Brooks School	1	\$ 4,845,500	\$ 11,259,500	\$ 16,105,000	1%	\$ 199,541	\$ 49,885
President & Fellows of Harvard Coll	30	\$ 38,296,700	\$ -	\$ 38,296,700	3%	\$ 474,496	\$ 118,624
The Fenn School	2	\$ 3,292,400	\$ 452,100	\$ 3,744,500	0%	\$ 46,394	\$ 11,599
State	58	\$ 85,696,400	\$ 48,265,700	\$ 133,962,100	12%	\$ 1,659,790	\$ 414,948
Commonwealth of Massachusetts	41	\$ 58,927,500	\$ 45,134,000	\$ 104,061,500	9%	\$ 1,289,322	\$ 322,330
Commonwealth of Massachusetts	2	\$ 4,538,900	\$ 2,311,300	\$ 6,850,200	1%	\$ 84,874	\$ 21,218
Massachusetts Bay Transit Authority	2	\$ 579,900	\$ 308,300	\$ 888,200	0%	\$ 11,005	\$ 2,751
Massachusetts Dept Of Highways	3	\$ 119,600	\$ -	\$ 119,600	0%	\$ 1,482	\$ 370
Massachusetts Port Authority	9	\$ 20,196,600	\$ -	\$ 20,196,600	2%	\$ 250,236	\$ 62,559
Middlesex County	1	\$ 1,333,900	\$ 512,100	\$ 1,846,000	0%	\$ 22,872	\$ 5,718
Federal	78	\$ 61,442,800	\$ 18,057,600	\$ 79,500,400	7%	\$ 985,010	\$ 246,252
United States of America	5	\$ 1,590,000	\$ 1,483,000	\$ 3,073,000	0%	\$ 38,074	\$ 9,519
Usa Department of The Interior	71	\$ 58,607,600	\$ 16,034,900	\$ 74,642,500	7%	\$ 924,821	\$ 231,205
Usa National Park	2	\$ 1,245,200	\$ 539,700	\$ 1,784,900	0%	\$ 22,115	\$ 5,529
Land	83	\$ 53,234,200	\$ 7,700	\$ 53,241,900	5%	\$ 659,667	\$ 164,917
Concord Land Conservation Tr	54	\$ 38,313,200	\$ -	\$ 38,313,200	3%	\$ 474,701	\$ 118,675
Concord Land Conservation Trust	28	\$ 14,730,300	\$ 7,700	\$ 14,738,000	1%	\$ 182,604	\$ 45,651
Lincoln Land Conservation Tr	1	\$ 190,700	\$ -	\$ 190,700	0%	\$ 2,363	\$ 591
Cultural/Community	14	\$ 14,887,200	\$ 28,650,100	\$ 43,537,300	4%	\$ 539,427	\$ 134,857
Boys Scouts of America	1	\$ 176,600	\$ -	\$ 176,600	0%	\$ 2,188	\$ 547
Concord Antiquarian Society	2	\$ 689,700	\$ 3,320,100	\$ 4,009,800	0%	\$ 49,681	\$ 12,420
Concord Art Association	1	\$ 964,100	\$ 1,928,800	\$ 2,892,900	0%	\$ 35,843	\$ 8,961
Concord Scout House Inc	1	\$ 1,049,100	\$ 688,100	\$ 1,737,200	0%	\$ 21,524	\$ 5,381
Habitat For Humanity of Greater Lowell Inc	1	\$ -	\$ 228,000	\$ 228,000	0%	\$ 2,825	\$ 706
Louisa May Alcott Memorial Assoc	3	\$ 2,266,300	\$ 2,280,700	\$ 4,547,000	0%	\$ 56,337	\$ 14,084
Minuteman Arc for Human Services Inc	1	\$ 1,578,800	\$ 2,725,800	\$ 4,304,600	0%	\$ 53,334	\$ 13,333

Ralph Waldo Emerson Mem Assoc	1	\$ 743,400	\$ 2,020,500	\$ 2,763,900	0%	\$ 34,245	\$ 8,561
The Protestant Guild for Human Svs Inc	1	\$ 2,961,100	\$ 5,262,600	\$ 8,223,700	1%	\$ 101,892	\$ 25,473
Toc - 51 Walden Performing Arts Center	1	\$ 877,700	\$ 1,188,200	\$ 2,065,900	0%	\$ 25,597	\$ 6,399
Toc - The Umbrella Arts Center	1	\$ 3,580,400	\$ 9,007,300	\$ 12,587,700	1%	\$ 155,962	\$ 38,990
Healthcare Organizations	3	\$ 2,825,800	\$ 38,709,300	\$ 41,535,100	4%	\$ 514,620	\$ 128,655
Emerson Hospital	3	\$ 2,825,800	\$ 38,709,300	\$ 41,535,100	4%	\$ 514,620	\$ 128,655
Religious Organizations	12	\$ 9,848,100	\$ 26,930,200	\$ 36,778,300	3%	\$ 455,683	\$ 113,921
Archbishop Of Boston Corp Sole	2	\$ 1,481,500	\$ 6,138,500	\$ 7,620,000	1%	\$ 94,412	\$ 23,603
Christian Science Church	1	\$ 765,200	\$ 1,790,500	\$ 2,555,700	0%	\$ 31,665	\$ 7,916
Concord Area Jewish Study Group Inc	1	\$ 883,100	\$ 4,602,500	\$ 5,485,600	0%	\$ 67,967	\$ 16,992
Masonic Corp	1	\$ 529,400	\$ 1,073,600	\$ 1,603,000	0%	\$ 19,861	\$ 4,965
New Life Community Church	1	\$ 926,800	\$ 1,012,900	\$ 1,939,700	0%	\$ 24,033	\$ 6,008
St Bernards Catholic Church	1	\$ 779,800	\$ -	\$ 779,800	0%	\$ 9,662	\$ 2,415
Trinitarian Congregational Church	1	\$ 2,040,000	\$ 3,656,800	\$ 5,696,800	1%	\$ 70,583	\$ 17,646
Trinity Church Of Concord	1	\$ 1,117,700	\$ 5,217,700	\$ 6,335,400	1%	\$ 78,496	\$ 19,624
West Concord Union Church	2	\$ 906,400	\$ 3,087,900	\$ 3,994,300	0%	\$ 49,489	\$ 12,372
West Concord Union Church, The	1	\$ 418,200	\$ 349,800	\$ 768,000	0%	\$ 9,516	\$ 2,379
Concord Housing	26	\$ 13,767,700	\$ 19,289,200	\$ 33,056,900	3%	\$ 409,575	\$ 102,394
Cha Local Properties LLC	10	\$ 4,703,900	\$ 4,222,200	\$ 8,926,100	1%	\$ 110,594	\$ 27,649
CHDC - JV LLC	1	\$ 1,443,700	\$ -	\$ 1,443,700	0%	\$ 17,887	\$ 4,472
Concord Housing Authority	13	\$ 6,845,900	\$ 14,897,800	\$ 21,743,700	2%	\$ 269,404	\$ 67,351
Concord Housing Development Corp	2	\$ 774,200	\$ 169,200	\$ 943,400	0%	\$ 11,689	\$ 2,922
Conservation Organizations	21	\$ 21,524,000	\$ 6,597,700	\$ 28,121,700	2%	\$ 348,428	\$ 87,107
Massachusetts Audubon Society Inc	4	\$ 12,079,300	\$ 4,232,100	\$ 16,311,400	1%	\$ 202,098	\$ 50,525
Massachusetts Bay Transit Authority	1	\$ 28,000	\$ -	\$ 28,000	0%	\$ 347	\$ 87
Sudbury Valley Trustees Inc	3	\$ 1,660,900	\$ -	\$ 1,660,900	0%	\$ 20,579	\$ 5,145
The Walden Woods Project	3	\$ 1,349,900	\$ 542,300	\$ 1,892,200	0%	\$ 23,444	\$ 5,861
Thoreau Farm Trust Inc	1	\$ 701,700	\$ 694,500	\$ 1,396,200	0%	\$ 17,299	\$ 4,325
Trustees Of Reservations	2	\$ 1,637,500	\$ 1,127,400	\$ 2,764,900	0%	\$ 34,257	\$ 8,564
Trustees Of Town Donations	1	\$ 238,700	\$ -	\$ 238,700	0%	\$ 2,957	\$ 739
Walden Woods Project Inc	6	\$ 3,828,000	\$ 1,400	\$ 3,829,400	0%	\$ 47,446	\$ 11,862
Housing	3	\$ 2,306,000	\$ 1,665,900	\$ 3,971,900	0%	\$ 49,212	\$ 12,303
Community Housing Options Inc	1	\$ 521,700	\$ 611,800	\$ 1,133,500	0%	\$ 14,044	\$ 3,511
Concord Assabet Adolescent Services	1	\$ 693,300	\$ 531,200	\$ 1,224,500	0%	\$ 15,172	\$ 3,793
Concord Home For the Aged	1	\$ 1,091,000	\$ 522,900	\$ 1,613,900	0%	\$ 19,996	\$ 4,999
Grand Total	645	\$ 570,722,600	\$ 567,806,800	\$ 1,138,529,400	100%	\$14,106,379	\$ 3,526,595



Payment in Lieu of Taxes (PILOT) Action Plan

SELECT BOARD MEETING – JANUARY 27, 2025

Overview of the PILOT Program



What is the PILOT Program?

Voluntary contributions from tax-exempt organizations.

Supports municipal services (public safety, infrastructure).

Ensures fairness and financial sustainability.



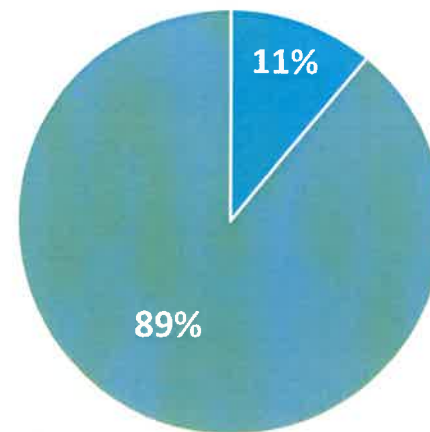
Why it Matters for Concord:

11% of Concord's land is tax-exempt.

Aims to offset municipal service costs.

Taxable vs. Non-Taxable Land

■ Non-Taxable ■ Taxable






Current Status

EXISTING CONTRIBUTIONS:

- **Total PILOT Revenue: ~\$1,352,723**
- **Agreements in place with:**
 - State-Owned Properties: **\$872,561**
 - Federal Government Properties: **\$3,529**
 - Local Agreements:
 - Concord Municipal Light Plant: **~\$450,000**
 - Concord Housing Authority: **\$26,633**

KEY MILESTONES ACHIEVED:

-  **Policy Adoption:** Completed November 2024
-  **Property Data Review:** Comprehensive analysis completed (\$1.13B exempt value)
-  **Outreach Preparation:** In progress for April 2025

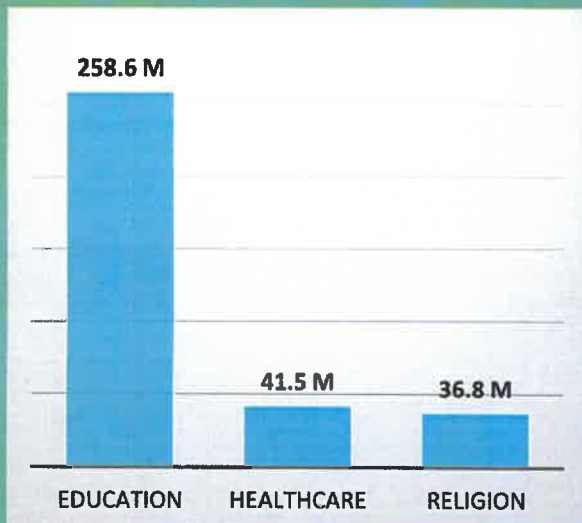


Category	Parcels	Land Value	Building Value	Total Value	%	Tax 100%	Tax 25%
Educational Institutions	56	\$101,665,900	\$156,964,000	\$258,629,900	56%	\$3,204,424	\$801,106
Land	83	\$53,234,200	\$7,700	\$53,241,900	11%	\$659,667	\$164,917
Cultural/Community	14	\$14,887,200	\$28,650,100	\$43,537,300	9%	\$539,427	\$134,857
Healthcare Organizations	3	\$2,825,800	\$38,709,300	\$41,535,100	9%	\$514,620	\$128,655
Religious Organizations	12	\$9,848,100	\$26,930,200	\$36,778,300	8%	\$455,683	\$113,921
Conservation Organizations	21	\$21,524,000	\$6,597,700	\$28,121,700	6%	\$348,428	\$87,107
Housing	3	\$2,306,000	\$1,665,900	\$3,971,900	1%	\$49,212	\$12,303
Total	192	\$2,306,000	\$259,524,900	\$465,816,100	100%	\$5,771,461	\$1,442,865

Overview of All Targeted Tax-Exempt Properties – \$465,816,100

EXCLUSIONS: TOWN-OWNED, STATE/FEDERAL PROPERTIES, EXISTING AGREEMENTS

Targeted Properties for PILOT Outreach



Outreach Prioritization Criteria


- 🏢 **Total Assessed Value:** High-value properties are prioritized
- 🏥 **Institutional Significance:** Focus on major educational and healthcare institutions
- 🤝 **Willingness to Participate:** Based on collaboration history and community ties

Key Focus Areas:

- **Educational institutions:** 56 properties, 56% of total assessed value
- **Healthcare organizations:** 3 properties, 9% of total assessed value
- **Religious and charitable organizations:** 12 properties, 8% of total assessed value

Key Figures + Contribution Scenarios

Organization	Assessed Value	100 %	50%	25%	10%
Middlesex School	\$90,243,200	\$1,118,113	\$559,057	\$279,528	\$111,811
Emerson Hospital	\$41,535,100	\$514,620	\$257,310	\$128,655	\$51,462
Concord Academy	\$77,152,800	\$955,923	\$477,962	\$238,981	\$95,592
Other NFPs	\$256,885,000	\$3,182,805	\$1,591,403	\$795,701	\$318,281
Total	\$465,816,100	\$5,770,386	\$2,885,193	\$1,442,596	\$577,038





Phase 1

Jan – March
Outreach material
development



Phase 2

April – June
Initial outreach and
stakeholder meetings



Phase 3

FY26 +
Agreement execution and
monitoring

Implementation Plan



Key Considerations & Challenges



LEGAL COMPLIANCE AND
VOLUNTARY PARTICIPATION



FINANCIAL SUSTAINABILITY
AND EXPECTATIONS



STAKEHOLDER ENGAGEMENT
AND PUBLIC PERCEPTION



Roles & Responsibilities



Next Steps

Finalizing outreach materials by March 2025

Sending outreach letters in April 2025

Conducting stakeholder meetings

Regular reporting to Select Board



Next Steps & Moving Forward

- **Outreach Launch:**
 - April 2025 – Initial communication with targeted organizations.
- **Collaboration Focus:**
 - Building sustainable partnerships with educational and healthcare institutions.
- **Transparency & Reporting:**
 - Regular updates to the Select Board and the community.

Concord is committed to fostering strong partnerships with our tax-exempt community to support essential services and ensure long-term financial sustainability.

Select Board Liaison Reports

Liaison Reports – Paul Boehm

March 16, 2026

Public Ceremonies and Celebrations Committee

(March 4 and March 11 meetings)

The committee is entering a busy period preparing for several upcoming events. Meetings have focused primarily on planning and event coordination.

Upcoming events include:

- Honored Citizen Ceremony – March 29
- Meriam’s Corner Ceremony – April 11
- Dawn Salute – April 19
- Patriot’s Day Parade and events – April 20

The committee continues to face a **significant membership shortage, with four current vacancies**.

Transportation Advisory Committee (TAC)

(March 11 meeting)

TAC held a joint meeting with the Public Works Commission focused on integrating roadway safety improvements with scheduled paving projects.

Safety requests previously compiled and ranked by Stantec were reviewed. Stantec had completed a ranking of 178 roadway safety requests using engineering criteria, infrastructure analysis, and public input.

Approximately 30 “lower cost” projects were selected for further consideration based on:

- Engineering rankings
- Alignment with the 2026 paving schedule
- Relatively low implementation costs

These projects represent the first tranche of safety improvement project request that could be incorporated into the 2026 paving program.

Higher-cost safety projects will be evaluated separately, with possible funding through Chapter 90, Complete Streets, and capital funding sources.

A related report “Comprehensive Transportation Mobility Strategy” will be presented at the TAC meeting on April 14 (9:30 AM), with Select Board members invited.

TAC has also revised its committee charge, which will be discussed with the Town Manager and Select Board following its next meeting.

Public Works Commission (PWC)

(March 11 meeting)

The Commission met jointly with TAC.

The PWC discussed two Town Meeting Citizen Petition articles as presented by the petitioners:

Article 30 – Solar Rooftop Bylaw

Discussion focused on the history of pursuing a bylaw versus a policy approach. The bylaw would establish a requirement, with potential project-specific opt-outs requiring Select Board approval.

Article 42 – Composting Ratepayer Plan

Discussion emphasized the need for a complete cost analysis, including staff time for program implementation and management. Members discussed the relative merits of a town-run program versus the current private subscription model.

Engineering staff (S. Dookran and J. Cormier) then presented the 2026 roadway paving schedule, which is available via a map on the Public Works website. A street list will also be posted for easier reference.

The paving discussion led to a broader joint discussion regarding integration of roadway safety improvements into paving projects, both in the near term and longer term (see above TAC report). The discussion was facilitated by Stantec.

Natural Resources Commission (NRC)

(March 11 meeting)

The Commission conducted routine project reviews and discussed two Town Meeting articles:

- Article 25 – Conservation Fund Bylaw
- Article 26 – Community Preservation Act appropriations, including initial funding of approximately \$500,000

Both articles received unanimous support from the Commission.

The NRC will have **one vacancy following Town Meeting**.

Warner's Pond Management Committee (WPMC)

(March 5 meeting)

The committee held its second meeting and reviewed next steps in developing a management strategy for Warner's Pond.

With approximately \$192,000 in available CPC funding, the committee received guidance from Ryan Ferrara (Assistant CFO) and Amanda Moore (Procurement Manager) regarding procurement processes and timelines for potential consulting support.

Initial discussion also began on elements of a possible Adaptive Management Plan.

West Concord Advisory Committee (WCAC)

(March 4 meeting)

Developers presented an updated proposal for 166 Commonwealth Avenue. The project must still go before the Natural Resources Commission, Planning Board, and Zoning Board of Appeals.

The proposal was generally well received, with discussion focused on design elements and potential crosswalk and safety improvements at Kenny Dunn Square.

The committee continues to review and update its committee charge.

Upcoming vacancies include:

- **Two voting members**
 - **Two associate members**
-

PEG Access Advisory Committee (PAAC)

(No recent meeting)

The committee has not met recently due to the absence of a chair and changing membership.

Liaison Boehm met with Jeff Weiner (IT Director) and Julie Manoogian (Minuteman Media Network Manager) to discuss:

- The upcoming budget presentation to the Finance Committee and Town Meeting
- The future focus of the committee

With the 10-year Comcast contract renegotiation now completed, the committee's role may be toward:

- Monitoring contract compliance
- Advising on the strategic direction of Minuteman Media Network (MMN) operations
- Recommending effective use of Comcast revenues and potential new revenue sources

The committee charge is under review, with a possible recommendation to rename the group the “Minuteman Media Network Advisory Committee.”

The committee currently has **two vacancies** and is expected to resume discussions at its next meeting

2229 Main Street Oversight Committee

(March 6 Meeting)

The committee discussed the upcoming EPA Public Meeting to be held on April 2 and the need to discuss not only the remediation actions completed and underway, but also the goals of the cleanup and what the condition of the site will be when cleanup is completed for turnover to an owner (e.g., the Town) and for reuse.

The committee felt that this context is important with regarding to risk communication efforts with the public (i.e., describing in detail the future cleanup up status of the site).

Liaison Report for Wendy Rovelli (3/16/26)

Trustees of Town Donations (3/4)

- Trustees invited Paul Ressler of The Scholarship Fund to review the procedures used for oversight and management of 5 scholarship funds. Criteria for management of additional funds was discussed. The Trustees have several small scholarship funds and are considering accumulation of annual interest and distributing funds every 5 years.
- Trustees reviewed and authorized release of funds for 7 additional funds.

Tax Relief Evaluation Task Force (3/5,3/12)

- The committee has drafted a full report and discussed final recommendations for the Select Board. A full technical review and validation of survey findings/analysis was completed. The committee is being careful to qualify any conclusions drawn from the town wide survey. A final review by all committee members and the Assessors Office is planned with a target completion in early April. A tentative date for a presentation to the Select Board is target for April 13th.

Financial Audit Advisory Committee (3/9)

- The committee reviewed information requested following the review of the FY24 Town and CT24 CMLP audits including engagement letters, audit schedules, detailed communication timelines, a review of the Finance Dept and CMLP Accounting organization and staffing changes, MUNIS implementation components and timelines; CMLP system enhancements and a detailed discussion about reconciliation complexity. While many staff changes have occurred, the accounting teams are fully staffed and improving knowledge of MUNIS functionality. Training is now focused on external depts use of MUNIS to improve system wide knowledge and operational efficiency. The committee discussed with staff the potential to assess utility billing options, to have future discussion and updates on internal controls and conducting some benchmarking against other towns to assess cost effectiveness.

Financial Policy Work Group (3/11)

- The committee reviewed key funding metrics for Town/CPS capital outlay and debt within the levy. The denominator for the current metrics are not clearly defined. The committee agreed that the denominator for both should be the Total Budget less Town & CPS Excluded debt, Minuteman and CCRSD expense (operating and debt). The targets remain unchanged: Capital outlay between 2-3% and Debt within the levy at no more than 5%, however both are calculated as percentage of the newly defined denominator. Furthermore, if the combination of capital outlay and debt service within the levy is less than 7%, a contribution to the Capital Stabilization fund should be considered in an amount up to 7%. This recommendation ensures proper funding for renewal of our capital assets. This policy will be reviewed by the Finance Committee and then followed by review and final approval by the Select Board.