



# Town of Reading Meeting Posting with Agenda

2018-07-16 LAG

## Board - Committee - Commission - Council:

Select Board

Date: 2023-01-24

Time: 7:00 PM

Building: Reading Town Hall

Location: Select Board Meeting Room

Address: 16 Lowell Street

Agenda:

Purpose: General Business

Meeting Called By: Caitlin Nocella on behalf of Chair Mark Dockser

Notices and agendas are to be posted 48 hours in advance of the meetings excluding Saturdays, Sundays and Legal Holidays. Please keep in mind the Town Clerk's hours of operation and make necessary arrangements to be sure your posting is made in an adequate amount of time. A listing of topics that the chair reasonably anticipates will be discussed at the meeting must be on the agenda.

**All Meeting Postings must be submitted in typed format; handwritten notices will not be accepted.**

### Topics of Discussion:

	<p><b><i>This Meeting will be held in-person in the Select Board Meeting Room at Town Hall and remotely on Zoom. It will also be streamed live on RCTV as usual.</i></b></p> <p>Join Zoom Meeting  <a href="https://us06web.zoom.us/j/88120292250">https://us06web.zoom.us/j/88120292250</a></p> <p>Meeting ID: 881 2029 2250          One tap mobile          +16465189805,,88120292250# US (New York)          +16465588656,,88120292250# US (New York)</p> <p>Dial by your location          +1 646 518 9805 US (New York)          +1 646 558 8656 US (New York)</p> <p>Meeting ID: 881 2029 2250          Find your local number: <a href="https://us06web.zoom.us/u/kkKfpbYyN">https://us06web.zoom.us/u/kkKfpbYyN</a></p>	PAGE #
<b>7:00</b>	Overview of Meeting	
<b>7:05</b>	Public Comment	
<b>7:15</b>	SB Liaison and Town Manager Reports	
<b>7:20</b>	Discuss/Vote to Authorize Debt from the MWRA Local Financial Assistance Program	3
<b>7:45</b>	Discussion and Vote to Approve Reading's Housing Production Plan	25

This Agenda has been prepared in advance and represents a listing of topics that the chair reasonably anticipates will be discussed at the meeting. However the agenda does not necessarily include all matters which may be taken up at this meeting.



## Town of Reading Meeting Posting with Agenda

<b>8:00</b>	Discussion and Vote on Town Manager Annual Review	104
<b>8:30</b>	Potential Executive Session Purpose 2: Conduct strategy session in preparation for contract negotiations with Town Manager Fidel Maltez and/or conduct contract negotiations with Town Manager Fidel Maltez	
<b>9:30</b>	Discuss responses to request for proposals (RFP) for the purchase property for municipal use, including an executive session under Purpose 6 to consider the purchase, exchange, lease, or value of the real property identified in the RFP responses. <i><u>NOTE: Responses to the RFP are due by 1pm on January 23. This agenda item will be amended after the responses are opened with the location of the properties identified in any submitted response.</u></i>	
<b>10:00</b>	Discuss Future Agendas	169
<b>10:15</b>	Approve Meeting Minutes	172



# MASSACHUSETTS WATER RESOURCES AUTHORITY

Charlestown Navy Yard  
100 First Avenue, Building 39  
Boston, MA 02129

Frederick A. Laskey  
Executive Director

Telephone: (617) 242-6000  
Fax: (617) 788-4899  
TTY: (617) 788-4971

December 22, 2022

Diane Morabito, Town Treasurer  
Town of Reading  
16 Lowell Street  
Reading, MA 01867

## RE: MWRA Local Water System Assistance Program - Funding Distribution

Dear Ms. Morabito:

Enclosed please find the financial assistance and loan agreements for signature. Eligible funding for this project [Additional Funds for the Downtown Water Main Improvements] is \$1,543,800.00. Funding shall be in the form of an interest-free loan. The loan will be re-paid to the MWRA in ten equal installments (\$154,380.00), over a ten-year period, beginning one year from the original quarterly funding distribution date. Funding distribution is planned for on or about February 2, 2023. Initial loan repayment is scheduled for February 15, 2024.

The financial assistance award will require the issuance of a Water Bond or other documentation verifying obligation of the community to repay the loan to the MWRA. An Opinion of Bond Counsel will be required with the Water Bond or any other proposed obligation for repayment. The draft opinion of bond counsel and draft water bond must be received by the MWRA no later than Monday, January 23, 2023 to ensure disbursement of funds on February 2, 2023.

Please print six copies (single-sided) of each agreement. We will make arrangements for delivery or pick-up of the executed and sealed financial assistance and loan documents prior to Monday, January 23, 2023. Please note, a town seal is required on each copy of the loan agreement. If you have any questions or comments relating to these matters, please do not hesitate to contact me at [claudia.baptista@mwra.com](mailto:claudia.baptista@mwra.com) or (617) 788-4831.

Sincerely,

*Claudia Baptista*

Claudia Baptista  
Project Manager  
MWRA Community Support Program

cc: Jane Kinsella, Director of Public Works  
Ryan Percival, P.E., Town Engineer  
Sharon Angstrom, Finance Director/ Town Accountant  
Fidel A. Maltez, Town Manager  
Charlene Doucette, Locke Lorde  
Tom Frontiero, MWRA Treasury

## LOAN AGREEMENT

LOAN AGREEMENT, dated the 30<sup>th</sup> day of January, 2023 between the Massachusetts Water Resources Authority, a body politic and corporate, a public instrumentality and an independent public authority of The Commonwealth of Massachusetts (the "Authority") established by the Massachusetts Water Resources Authority Act, Chapter 372 of the Acts of 1984 of the Commonwealth of Massachusetts ("Commonwealth"), as amended (the "Act"), having its principal place of business in Boston, Massachusetts and the Town of Reading (the "Government Unit").

### WITNESSETH:

WHEREAS, the Authority has established a program of loans (the "Local Water System Assistance Program") to assist Local Bodies, as defined in the Act, in establishing programs to improve local water systems which will have a beneficial impact on maintaining and improving the regional water system; and

WHEREAS, the Government Unit has requested a loan from the Authority in the amount of \$1,543,800.00 (hereinafter referred to as the "Loan") for the purposes of funding its Local Water System Improvement Program and, to evidence the indebtedness to be incurred thereby, has duly authorized the issuance of its bonds in the principal amount of the Loan, (the "Municipal Bonds") which Municipal Bonds are to be issued to and held by the Authority in accordance with this Loan Agreement; and

WHEREAS, the Authority may finance the Loan from the proceeds of an issue of its tax-exempt revenue bonds which proceeds are subject to certain limitations as to investment and application;

NOW THEREFORE, the parties hereto agree as follows:

1. The Loan and the Municipal Bonds. The Authority hereby agrees to make the Loan and the Government Unit hereby agrees to accept the Loan to evidence its obligation to repay the Loan by issuing to the Authority the Municipal Bonds in the principal amount of the Loan, and substantially in the form attached hereto as Exhibit A. Neither the Loan nor the Municipal Bonds shall bear interest.

2. Representation and Warranties. The Government Unit represents and warrants as follows: (a) it has duly adopted all necessary votes and resolutions and has taken all proceedings required by law to enable it to enter into this Loan Agreement and issue its Municipal Bonds to the Authority to evidence its obligation to pay the Loan; (b) The Municipal Bonds have been duly authorized, executed and delivered by the Government Unit and constitute valid and binding obligations of the

Government Unit, enforceable in accordance with their terms, except as such enforceability may be limited by bankruptcy, insolvency, moratorium, reorganization or other laws affecting creditors' rights heretofore or hereafter enacted and general equity principles; (c) the Municipal Bonds constitute a general obligation of the Government Unit to which its full faith and credit is pledged; (d) all permits and approvals necessary to construct the project being financed by the Loan (the "Project"), given the current status of the Project, have been obtained and remain in full force and effect; and (e) no litigation before or by any court, public board or body is pending or threatened against the Government Unit seeking to restrain or enjoin the issuance of the Municipal Bonds or the construction of the Project.

3. Covenants. The Government Unit agrees that until the Loan shall be paid in full, and the proceeds of the Loan, together with the earnings thereon, shall be expended in full, it shall perform the following covenants: (a) it shall make the payments with respect to the principal of the Municipal Bonds in ten equal annual installments, all at the time and in the amounts set forth in the Municipal Bonds; (b) it shall notify the Authority in writing, from time to time, of the name of the official of the Government Unit to whom invoices for the payment of principal should be addressed if different from the address set forth in paragraph 8; and (c) it shall furnish the Authority annually such information regarding the Government Unit's Local Water System Improvement Program and the implementation thereof, including project status and expenditure reports and evidence of compliance with any applicable permits and any other financial or project information as the Authority may reasonably request.

4. Opinion of Bond Counsel. Attached hereto as Exhibit B is an opinion of bond counsel or other local counsel to the Government Unit to the effect the (i) the Municipal Bonds have been duly authorized, executed and delivered by the Government Unit and constitute a valid and binding general obligations of the Government Unit, enforceable in accordance with their terms, except as such enforceability may be limited by bankruptcy, insolvency, and moratorium, reorganization or other laws affecting creditors' rights heretofore or hereafter enacted and to general equity principals, and (ii) the Municipal Bonds constitute a general obligation to which the Government Unit's full faith and credit is pledged.

5. Application of Loan Moneys. (a) The Authority shall deposit the amount of the Loan in single account (the "Account") separated from its other moneys. Such Account shall be invested with MMDT or in such other manner as may be approved by the Authority from time to time in the Authority's reasonable discretion. Earnings on the account shall be retained in such Account. The Government Unit shall arrange for copies of all investment reports with respect to the Account to be furnished in a timely fashion to the Authority.

(b) The Proceeds, together with the earnings thereon, shall be applied to the costs of the Government Unit's Local Water System Improvement Program.

(c) The Government Unit acknowledges that the Authority has financed the Loan with the issue of the Authority's tax-exempt revenue bonds (the "Authority Bonds"). The Government Unit

agrees to take such steps as are reasonably requested by the Authority in order to preserve the tax-exempt status of the Authority Bonds including, but not limited to, the following: (i) to pay to the Authority such amount, not exceeding the Government Unit's investment earnings on the Proceeds, as may be required to satisfy the Authority's obligation to pay rebate to the United States pursuant to Section 148 of the Internal Revenue Code of 1986, as amended (the "Code"); (ii) to the extent feasible, to limit the investment of the Proceeds, together with any earnings thereon, to such interest rate or to such investments as the Authority may specify from time to time in writing; and (iii) to repay to the Authority the Proceeds upon its written request, together with any earnings thereon, in exchange for other moneys with are not subject to investment restrictions or which are subject to lesser restrictions.

(d) The Government Unit shall repay to the Authority the unexpended balance in any account established pursuant to Section 5(a) hereof on or before November 15, 2023 or thereafter shall invest such unexpended balance in accordance with the directions of the Authority in order to assure compliance with the applicable provisions of the Code.

6. Prepayment of Loan. The Authority shall have the right to cancel all or any part of its obligations hereunder and the Government Unit shall be obligated to repay all of the Proceeds previously disbursed to it which remain unexpended, together with any earnings on the Proceeds, upon the Authority's request if: (a) any representations made by the Government Unit to the Authority in connection with its application for Authority assistance shall be incorrect or incomplete in any material respect; or (b) the Government Unit is in (i) default of any of its obligations hereunder to make payments on the Municipal Bonds as and when the same shall become due and payable or (ii) in default of any other covenant or agreement on its part contained herein and such default shall continue for thirty (30) days after written notice from the Authority specifying the default and requesting that the same be remedied.

In addition to the foregoing provisions, the Government Unit may prepay the Loan upon thirty (30) days written notice to the Authority. Except as expressly provided herein, all prepayments shall be without penalty.

The Government Unit shall remain liable after any prepayment for the unpaid principal on the Municipal Bonds. Any prepayment shall be applied to the installments of principal due in inverse chronological order.

7. Tax Covenants. The Government Unit shall not take, or permit to be taken, any action or actions that would cause any of the Authority's Bonds to be an "arbitrage bond" within the meaning of Section 148 of the Code or a "private activity bond" within the meaning of Section 141(a) of the Code, or that would otherwise cause interest on the Authority Bonds to be included in gross income of the recipient thereof for the purpose of federal income taxation.

8. Any notices to be delivered under this Loan Agreement shall be effective upon receipt and shall be given by certified mail, return receipt requested to:

As to the Authority:

Matthew R. Horan, Treasurer  
Massachusetts Water Resources Authority  
100 First Avenue, Charlestown Navy Yard  
Boston, MA 02129

As to the Government Unit:

Diane Morabito, Town Treasurer  
Town of Reading  
16 Lowell Street  
Reading, MA 01867

9. Severability. If any provisions of this Loan Agreement shall for any reason be held to be invalid or unenforceable, the invalidity or unenforceability of such provision shall not affect any of the remaining provisions of the Loan Agreement and this Loan Agreement shall be construed and enforced as if such invalid or unenforceable provision had not been contained herein.

10. Counterparts. This Loan Agreement may be executed in one or more counterparts, any of which shall be regarded for all purposes as an original and all of which constitute but one and the same instrument. Each party agrees that it will execute any and all documents or other instruments, and take such other actions as may be necessary to give effect to the terms of this Loan Agreement.

11. No Waiver. No waiver by either party of any term or conditions of this Loan Agreement shall be deemed or construed as a waiver of any other terms or conditions, nor shall a waiver of any breach be deemed to constitute a waiver of any subsequent breach, whether of the same or of a different section, subsection, paragraph, clause, phrase, or other provision of this Loan Agreement.

12. Integration. This Loan Agreement merges and supersedes all prior negotiations, representations, and agreements between the parties hereto relating to the subject matter hereof and constitutes the entire agreement between parties hereto in respect hereof.

IN WITNESS WHEREOF, the parties hereto have executed this agreement the day and year first above written.

(SEAL)

MASSACHUSETTS WATER RESOURCES AUTHORITY

Attest:

\_\_\_\_\_  
Rose Marie Convery, Assistant Secretary

By \_\_\_\_\_  
Matthew R. Horan, Treasurer

(SEAL)

TOWN OF READING

\_\_\_\_\_  
Laura A. Gemme, Town Clerk

By \_\_\_\_\_  
Fidel A. Maltez, Town Manager



FINANCIAL ASSISTANCE AGREEMENT

BY AND BETWEEN

MASSACHUSETTS WATER RESOURCES AUTHORITY  
AND  
READING, MASSACHUSETTS

This Financial Assistance Agreement is made by and between the Massachusetts Water Resources Authority, a body politic and corporate and public instrumentality, established under the provisions of Chapter 372 of the Acts of 1984, with its principal place of business at 100 First Avenue Charlestown, MA 02129, ("Authority" or "MWRA") and Reading, MA, a municipal corporation duly organized and existing under the laws of the Commonwealth of Massachusetts, with its principal place of business at 16 Lowell Street, Reading, MA 01867 ("Awardee") (collectively, "Parties");

WHEREAS, on June 30, 2010 the Authority Board of Directors voted to approve a program whereby the Authority was permitted to offer financial assistance to Waterworks system communities to improve local water systems.

WHEREAS, the Awardee intends to conduct, or is conducting, a local water system improvement project ("Project"); and

WHEREAS, the Awardee filed a Financial Assistance Application in which it furnished information about the Project to the Authority; and

WHEREAS, the MWRA will provide financial assistance to the Awardee for its Project under certain terms and conditions, hereinafter provided.

NOW THEREFORE, in consideration of the foregoing and the promises contained herein, the Parties agree that the Authority will provide and the Awardee will accept financial assistance under the following terms and conditions:

I. SCOPE OF SERVICES.

The Awardee has entered into or will enter into, within ninety (90) days of the execution of this Agreement, a contract with a consultant or contractor for local water system improvement, in accordance with the Awardee's competitive procurement practice, and the scope of such work is listed in Attachment A.

II. FINANCIAL ASSISTANCE.

A. The Authority shall provide financial assistance ("Award") to the Awardee in the form of an interest-free loan. The total amount of the Award shall be \$1,543,800.00.

B. The Loan shall be governed by the attached Loan Agreement, which is incorporated herein by reference as Attachment C.

C. Upon execution of the Loan Agreement, the Authority shall initiate an electronic transfer of the total Award through the Automated Clearing House (ACH) having a pay date three business days after the execution date to the following designated account of the Awardee:

MMDT Account No. 4426 3390                      Federal Tax ID No. 04-600-1277

D. The Authority shall not be obligated to provide additional financial assistance above the Award amount regardless of additional Project costs which may be incurred by the Awardee.

III. EFFECTIVE DATE OF AGREEMENT.

This Agreement will take effect on the date of execution of both the Loan Agreement and this Agreement. In the event that this Agreement and the Loan Agreement are executed on different dates, the effective date of this Agreement shall be the later of the two dates.

IV. TERM.

The term of this Agreement shall begin upon the date of execution of this Agreement, including the execution of the Loan Agreement, and; unless otherwise terminated under Section XXV of this Agreement, shall be in effect until the Awardee fully repays the Loan to the Authority in accordance with the terms of the Loan Agreement. As evidence that the final payment has been made, the Authority will send notice to the Awardee indicating that the Loan has been discharged.

V. PROJECT SCHEDULE.

Implementation of the Project must begin within ninety (90) calendar days of execution of the Agreement, including the Loan Agreement. The Project must comply with the Project Schedule listed in Attachment B.

It is the obligation of the Awardee to obtain all licenses, permits, easements or any other approvals necessary to begin and successfully complete the Project.

VI. EXPENDITURE VERIFICATION REQUIREMENTS.

A. Throughout the completion of the Project Scope of Services, the Awardee shall submit progress reports to the Authority, on forms provided by the Authority, which outline the overall progress of the Project, the progress of key Project tasks, and the total Project cost expended to date. The frequency and schedule for progress reporting is outlined within Section 5.1 of MWRA Local Water System Assistance Program Guidelines. Progress reports shall be submitted to:

Massachusetts Water Resources Authority  
Charlestown Navy Yard  
100 First Avenue  
Boston, MA 02129  
Attn: Local Water System Assistance Program

B. The Awardee shall append to each progress report information which documents eligible Project costs, including, but not limited to, consultant and/or contractor invoices; awardee labor, equipment, materials and other costs; and ancillary expenses. Time sheets and work summaries documenting any requests for force account work reimbursement must also be provided.

C. The Awardee shall exercise its best efforts to accomplish the Project set forth in the Scope of Services within the Award Amount established. In the event that an increase or decrease in the total Project cost is anticipated, or in fact occurs, the Awardee shall immediately notify the Authority in writing, and shall submit a status report including reasons for changes in Project cost, work completed to date, total dollars expended to date, and an estimate of the cost required to complete the Project.

#### VII. PROJECT INSPECTION.

The Awardee shall make the Project site and all Project records available to the Authority staff for review during the course of the Project. Authority staff may periodically monitor the progress of work to insure that the Project is: (1) proceeding substantially as defined in the Scope of Services; and (2) proceeding substantially within the Project Schedule.

#### VIII. PROJECT CLOSEOUT PROVISIONS.

A. Upon completion of the Project, the Awardee shall notify the Authority that the project is complete and shall certify, on a form provided by the Authority, that all work included in the Scope of Services has been completed and performed in accordance with this Agreement. The Awardee shall submit to the Authority a Project closeout package which shall include a summary of all Project expenditures and the final Project cost.

B. If the final Project cost is less than the Award, the difference between the Award and the final Project closeout cost will be calculated and defined as the Project "Shortage Amount". The existence of a Project Shortage Amount will not affect the Loan repayment amount or schedule.

C. In the event that a Project Shortage Amount exists, the Authority shall either: (a) credit the Project Shortage Amount as part of Awardee's funding for an additional eligible project or future eligible project, or (b) send the Awardee a separate invoice for payment of the Project Shortage Amount forty-five (45) days prior to the next loan repayment date.

#### IX. PROJECT AUDIT PROVISIONS.

A. The Awardee, its engineers, and its contractors shall maintain books, records, and other documents that pertain to and involve transactions related to this Agreement in accordance with generally accepted accounting principals. The Awardee, its engineers, and its contractors shall also maintain the financial information and data used by the engineers and contractors in the preparation or support of all invoices and progress reports. The Authority and any other duly authorized person, shall have access to such books, records, documents, and other evidence for inspection, audit, and copying during normal business hours, upon ten (10) days notice and at the Authority's expense. The Awardee, its engineers, and its contractors shall provide proper facilities for such access and inspection. All documents shall be kept for at least seven (7) years after either the final payment to

the engineer or contractor or after the closeout of the Project, whichever is later.

B. The Awardee agrees to include the wording of Section IX.A., above, in all contracts and subcontracts hereafter awarded to third party contractors, vendors and service providers related to this Agreement.

C. Audits conducted by the Authority, or its duly authorized representatives, shall be in accordance with generally accepted government auditing standards and established procedures and guidelines of the Authority. Such audits shall be conducted at the expense of the Authority upon ten (10) days notice to the Awardee.

D. The Awardee agrees to provide the Authority with a copy of the Awardee's annual audited financial statements within a reasonable time after the issuance thereof, together with a certificate of the Awardee stating that the Awardee is in compliance with its obligations under this agreement.

X. INTERACTION WITH OTHER PROGRAMS OF ASSISTANCE.

The Awardee certifies that it has not and will not receive financial assistance under the State Revolving Fund (SRF) or any other state, federal, or other program of funding assistance for any Project costs for which financial assistance has been provided by MWRA Financial Assistance Programs.

XI. AUTHORITY TO EXECUTE AGREEMENT.

Prior to the execution of this Agreement, the Awardee shall take all steps necessary to authorize it to properly execute this Agreement.

XII. GOVERNING LAW.

This Agreement shall be governed by and construed and enforced in accordance with the laws of the Commonwealth of Massachusetts.

XIII. COMPLIANCE WITH LOCAL LAWS.

The Awardee shall comply with all applicable laws, ordinances, and codes of the state and local governments, and shall commit no trespass on any public or private property in performing any of the work embraced by this Agreement.

XIV. INVALIDITY OF PARTICULAR PROVISIONS.

If any provision of this Agreement shall to any extent be held invalid or unenforceable, the remainder of this Agreement shall not be deemed affected thereby.

XV. CONTRACTING/SUBCONTRACTING.

The Awardee shall have no capacity to involve the Authority in any contract nor to incur any liability on the part of the Authority.

XVI. CHANGES TO SCOPE OF SERVICES.

The Authority and the Awardee may, during the course of the project, mutually agree to revisions in the Scope of Services or Project Schedule. Such changes shall be incorporated into this Agreement by written amendment.

XVII. PROVISION OF CONTRACTS.

The Awardee agrees to submit to the Authority an executed copy of each contract for engineering services or construction relevant to the Scope of Services.

XVIII. EQUAL EMPLOYMENT OPPORTUNITY.

The Awardee shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, age, handicap status or national origin. The Awardee, its engineer(s), and its contractor(s) shall comply with all applicable laws and regulations pertaining to nondiscrimination, equal opportunity and affirmative action, including without limitation executive orders and rules and regulations of federal and state agencies of competent jurisdiction. The Awardee shall make positive efforts to achieve a goal of 7.18 percent participation of Minority-owned Business Enterprise(s) and 5.77 percent participation of Woman-owned Business Enterprise(s) within Professional Services contracts which are funded through financial assistance under this Agreement. For Non-Professional Services category work, the Awardee should make positive efforts to achieve a goal of 5.61 percent participation of Minority-owned Business Enterprise(s) and a goal of 4.88 percent participation of Woman-owned Business Enterprise(s) within project contracts.

For Construction, the Awardee shall require all construction contractors and subcontractors to make positive efforts to achieve: (1) a minority employee work force hour goal of 15.30 percent, (2) a woman employee work force hour goal of 6.90 percent, (3) a goal of 7.24 percent participation of Minority-owned Business Enterprise(s), and (4) a goal of 3.60 percent participation of Woman-owned Business Enterprise(s) within the project contracts.

XIX. INDEMNIFICATION.

The Awardee, at its expense, shall defend and shall indemnify and hold harmless the Authority, its members, officers and employees, from and against any and all claims, causes of action, suits, losses, damages and expenses, including attorneys' fees, arising out of or resulting from any acts, errors or omissions or breach of contractual duties by the Awardee and anyone employed by it (including Contractors, Subcontractors and/or Consultants and their employees) in performance of this Agreement. Such obligation shall not be construed to negate or abridge any other obligation of indemnification running to the Authority which would otherwise exist.

XX. MEMBERS, EMPLOYEES NOT LIABLE.

No member or employee of the Authority shall be charged personally or held contractually liable by or to the Awardee under any term or provision of this Agreement or because of any breach thereof or because of its execution or attempted execution.

XXI. INTEREST OF AWARDEE.

The Awardee covenants that its Contractors, Subcontractors and/or Consultants presently have no interest and shall not acquire any interest, direct or indirect, in the property to which this Agreement pertains or any parcels therein or any other interest which would conflict in any manner or degree with the performance of its services hereunder. The Awardee further covenants that no person having any such interest shall be employed in the performance of this Agreement.

XXII. INTEREST OF EMPLOYEES: M.G.L.C. 268A.

Neither Awardee, nor its Contractors, Subcontractors and/or Consultants shall, during the term of this Agreement, hire or employ on either a full-time or part-time basis any person or persons so long as such person shall be employed by the Authority.

The Awardee acknowledges that the Authority is a state agency for the purposes of Chapter 268A of the Massachusetts General Laws (the Massachusetts Conflict of Interest statute). The Awardee agrees to take actions and to forbear from taking actions, as circumstances require, so as to be in compliance at all times with said statute.

XXIII. ASSIGNABILITY.

The Awardee shall not assign any interest, in whole or in part, in this Agreement and shall not transfer any interest in the same, whether by assignment or novation, without the prior written approval of the Authority.

XXIV. PAYMENT NOT A WAIVER.

The Authority's payment to Awardee under this Agreement or its review, approval or acceptance of any actions by Awardee under this Agreement shall not operate as a waiver of any rights under this Agreement and the Awardee shall remain liable to the Authority for all damages incurred by the Awardee's failure to perform in accordance with the terms and conditions of this Agreement.

The rights and remedies of the Authority provided for under this Agreement are in addition to any other rights or remedies provided by law. The Authority may assert a right to recover damages by any appropriate means, including but not limited to set-off, suit, withholding, recoupment, or counter-claim either during or after performance of this Agreement.

XXV. TERMINATION OF THE AGREEMENT FOR CAUSE.

If, through any cause, the Awardee shall fail to fulfill in a timely and proper manner its obligations under this Agreement (including performance of the Scope of Services and maintenance of the Project Schedule); or if it is determined that there is probable cause to believe that the Award was obtained on the basis of fraud, deceit, or illegality; or if the Awardee has failed to comply with the terms and conditions of this Agreement; the Authority shall hereupon have the right to terminate this Agreement by giving written notice to the Awardee of such termination and specifying the effective date thereof.

The Awardee agrees that if this Agreement is terminated by the Authority, the Awardee shall immediately repay to the Authority the full amount of any grant portion of the Award which is identified in Section II, above. The Awardee agrees that the Loan shall not be affected by such termination and that the separate Loan Agreement shall remain in full effect.

XXVI. ATTACHMENTS.

Attachments to this Agreement are incorporated herein and are as follows:

- Attachment A Scope of Services
- Attachment B Project Schedule
- Attachment C Loan Agreement

XXVII. PROJECT SPECIFIC ADDITIONAL TERMS AND CONDITIONS.

1. The community will inform the MWRA of the date for Final Inspection for the construction phases of the proposed projects.

IN WITNESS WHEREOF, the parties have executed this Agreement this \_\_\_\_\_ day of \_\_\_\_\_, 2023.

MASSACHUSETTS WATER RESOURCES AUTHORITY

BY: \_\_\_\_\_  
Matthew R. Horan, Treasurer

AWARDEE: Town of Reading, Massachusetts

BY: \_\_\_\_\_  
Diane Morabito, Town Treasurer



**MWRA LOCAL WATER SYSTEM ASSISTANCE PROGRAM  
FINANCIAL ASSISTANCE AGREEMENT**

**ATTACHMENT A**

**Town of Reading**

**Project No. LWSAP23-374**

**SCOPE OF SERVICES**

MWRA Project No. LWSAP23-374 provides additional funds (\$1,543,800) for MWRA Project No. LWSAP22-350: The Downtown Water Main Improvements (Phase 1). Project work includes the design and construction of approximately 1891 linear feet of cleaning and lining on Main Street and replacement of approximately 5411 linear feet of unlined 8 and 12-inch cast iron water main with ductile iron water main in the Downtown area (Haven Street, High Street, Linden Street, Gould Street, Ash Street and Washington Street). This project includes abandoning approximately 1050 linear feet of 8-inch cast iron main and transferring services to new 12-inch ductile iron main along Main Street (from Haven Street to Ash Street). A bid alternate was also included for installing steel casing pipe at the railroad water crossing. Note that MWRA Project No. LWSAP22-350 was funded (\$1,500,000) in August 2021.

**ATTACHMENT B**

**Town of Reading**

**Project No. LWSAP23-374**

**PROJECT SCHEDULE**

<u>Item</u>	<u>Start Date</u>	<u>Completion Date</u>
Construction	August 2022	May 2023

VOTE OF THE SELECT BOARD

I, the Clerk of the Select Board of the Town of Reading, Massachusetts, certify that at a meeting of the board held January 24, 2023, of which meeting all members of the board were duly notified and at which a quorum was present, the following votes were unanimously passed, all of which appear upon the official record of the board in my custody:

Voted: that the sale of the \$1,543,800 Water Bond of the Town dated January 30, 2023, to Massachusetts Water Resources Authority (the "Authority") is hereby approved and the Town Treasurer or other appropriate Town official is authorized to execute on behalf of the Town a Loan Agreement and a Financial Assistance Agreement with the Authority with respect to the bond. The bond shall be payable without interest on February 15 of the years and in the principal amounts as follows:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2024	\$154,380	2029	\$154,380
2025	154,380	2030	154,380
2026	154,380	2031	154,380
2027	154,380	2032	154,380
2028	154,380	2033	154,380

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

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

Dated: January 24, 2023

\_\_\_\_\_  
Clerk of the Select Board

\$1,543,800

\$1,543,800

THE COMMONWEALTH OF MASSACHUSETTS

TOWN OF READING

WATER BOND

The Town of Reading (hereinafter called the “Municipality”) in the County of Middlesex and in The Commonwealth of Massachusetts promises to pay to the Massachusetts Water Resources Authority (hereinafter called the “Authority”), or registered assigns, the sum of One Million Five Hundred Forty-Three Thousand Eight Hundred Dollars (\$1,543,800) in installments on February 15 of each year as set forth below, without interest:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2024	\$154,380	2029	\$154,380
2025	154,380	2030	154,380
2026	154,380	2031	154,380
2027	154,380	2032	154,380
2028	154,380	2033	154,380

Principal payments on this bond are payable at the offices of the Authority at 100 First Avenue, Charlestown Navy Yard, Boston, Massachusetts 02129. Upon final payment of the principal of this bond the Authority shall cancel this bond and return it to the Municipality.

This bond is the only instrument representing a borrowing of \$1,543,800 issued by the Municipality pursuant to Chapter 44 of the General Laws as amended and a vote of the Municipality duly passed on the twenty-first day of November, 2022. This bond is issued for the purpose of defraying the cost of improvements to the Municipality’s water system as described in said vote.

This bond is a general obligation of the Municipality and the full faith and credit of the Municipality is pledged for the payment of principal on this bond as the same shall become due and payable.

This bond is transferable only upon presentation to the Treasurer of the Municipality with a written assignment duly acknowledged or proved. No transfer hereof shall be effectual unless made on the books of the Municipality kept by the Treasurer as transfer agent and noted thereon by the Treasurer with a record of payments.

In Witness Whereof the Municipality has caused this bond to be signed by its Treasurer and countersigned by its Select Board and the seal of the Municipality to be affixed hereto as of the thirtieth day of January, 2023.

TOWN OF READING, MASSACHUSETTS

By: \_\_\_\_\_  
Treasurer

Countersigned:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
Select Board

(TOWN SEAL)

(Please Note: The following statements are an essential part of the permanent bond record. Read them carefully before signing this certificate. Advise Locke Lord LLP of any inaccuracy.)

**Town of Reading, Massachusetts**

**\$1,543,800 Water Bond**

CERTIFICATE

We, the Select Board and the Treasurer of the Town of Reading, Massachusetts, certify that we have signed the \$1,543,800 Water Bond (the “Bond”) of the Town dated January 30, 2023, and payable, without interest, in installments on February 15 of each year as set forth below:

<u>Year</u>	<u>Installment</u>	<u>Year</u>	<u>Installment</u>
2024	\$154,380	2029	\$154,380
2025	154,380	2030	154,380
2026	154,380	2031	154,380
2027	154,380	2032	154,380
2028	154,380	2033	154,380

The Bond bears the Town seal, which is also affixed to this certificate.

We further certify that the Loan Agreement with the Massachusetts Water Resources Authority (the “Authority”) dated January 30, 2023 providing for the sale of the Bond has been signed by the Town Manager and that the Financial Assistance Agreement dated January 30, 2023 relating to the Project financed by the Bond has been signed by the Treasurer and we hereby confirm those Agreements. The Loan Agreement and the Financial Assistance Agreement are sometimes referred to collectively in this certificate as the “Agreements.” Capitalized terms used in this certificate and not otherwise defined shall have the same meanings given those terms in the Agreements.

We, the Select Board and the Treasurer, also certify as follows:

1. Authority. The Bond is issued pursuant to G.L. c.44 §8(5) and a vote of the Town passed November 21, 2022 (Article 14), which authorized a total borrowing of \$1,543,800.

The issuance of the Bond and the execution of the Agreements were further authorized by a vote of the Select Board passed at a duly called meeting of the Board held January 24, 2023 (the “Select Board Vote”).

2. Other Debt. No other debt has been incurred under that vote of the Town.

I, the Treasurer, hereby certify that the delivery and receipt of the Bond was delivered on this date and the full purchase price of \$1,543,800 is expected to be received from the Authority on February 2, 2023.

We, the Select Board, the Treasurer and the Town Clerk, hereby certify as follows:

(a) Authorization, Execution and Delivery of Documents. The Loan Agreement, the Financial Assistance Agreement and the Bond have been duly authorized, executed and delivered. None of those instruments has been amended or supplemented since its date (except such amendments or supplements which have been approved by the Authority) or repealed and each such instrument remains in full force and effect as of this date.

(b) Signatures and Incumbency. The signatures of the Treasurer and the Select Board as appearing below are the genuine signatures of the persons who executed the Bond and who held those offices when the Bond was signed and when the Agreements and the Bond were signed and when they were delivered.

(c) Open Meeting Law. Except for the town meetings called pursuant to G.L. c.39, §10, all proceedings essential to the issue of the Bond and the authorization, execution and delivery of the Agreements and deliberations of a quorum relating thereto have been taken at a meeting or meetings open to the public; notice of each such meeting was filed in the office of the Town Clerk and publicly posted in the time and manner set forth in the General Laws, as amended, in effect at the time of each such meeting (Chapter 39, §23B for proceedings occurring prior to July 1, 2010 and Chapter 30A, §§18-25 for proceedings occurring on or after July 1, 2010), or, if applicable, in accordance with an alternative method of notice prescribed or approved by the Attorney General as set forth in 940 CMR 29.03(2)(b); no deliberations, decision or vote in connection with the Bond or the Agreements were taken in executive session and no vote was taken by secret ballot; and the official record of each such meeting was made available to the public and remains available to the public as set forth in G.L. c.39, §23B or c.30A, §§18-25, as amended.

(d) Proceedings. No proceeding essential to the authorization, execution, delivery or issue of the Agreements and the Bond has been repealed or amended except as stated in paragraph (1) above, and no proceedings have been taken relating to the Agreements and the Bond other than those certified to Locke Lord LLP.

(e) Bylaws. The bylaws described below are the only bylaws or standing votes of the Town affecting the authorization, sale or issue of the Bond, including the calling and conduct of town meetings, or the authorization, execution or delivery of the Agreements, and there has been no change therein affecting those matters in any way except as may be indicated below:

Town of Reading Massachusetts General Bylaws, as certified to Locke Lord LLP on November 22, 2021.

(f) Home Rule. The Town has not further amended its home rule charter adopted March 24, 1986, as amended through Chapter 16 of the Acts of 2015, and the Town has

not amended or repealed any special law relating to the Town through the use of home rule procedures except by adoption of the charter.

(g) Select Board Vote. Attached hereto is a true copy of the Select Board Vote, which has not been amended or repealed and remains in full force and effect on this date.

(h) Development Districts. The Town has not established any development districts pursuant to G.L. c.40Q.

(i) Execution of Counterparts and Delivery by Electronic Means. This certificate (the "Certificate") may be executed in several counterparts, each of which shall be regarded as an original and all of which shall constitute one and the same document. Delivery of an executed counterpart of a signature page to the Certificate by electronic mail in a ".pdf" file or by other electronic transmission shall be as effective as delivery of a manually executed counterpart signature page to the Certificate. Electronic signatures on the Certificate shall be deemed original signatures for the purposes of the Certificate and all matters relating thereto, having the same legal effect as original signatures.

*[Remainder of page intentionally left blank; signature page follows.]*

(j) No Litigation; No Financial Interest. There has been no litigation affecting the authorization, execution, delivery, validity or issue of the Agreements or the Bond or the power of the Town to levy and collect taxes to pay the Bond; none is pending or to our knowledge threatened; neither the corporate existence nor boundaries of the Town nor the title of any of us to our respective offices is being contested; and none of us and, to the best of our knowledge, no other official of the Town has any direct or indirect financial interest in or relationship with the Authority.

Dated: January 30, 2023  
(date of delivery of and  
payment for the Bond)

TOWN OF READING,  
MASSACHUSETTS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By: \_\_\_\_\_  
Treasurer

\_\_\_\_\_  
Town Clerk

Select Board

(TOWN SEAL)





# Housing Production Plan Town of Reading

Prepared for the Town of Reading

**By:** Anser Advisory ([Nicole Lambert, Project Manager](#); [Andrea Lombardi, Senior Director VP](#))

**With the assistance from the Town of Reading:** Fidel Maltez, Town Manager; Jean Delios, Assistant Town Manager; Julie Mercier, Community Development Director; Andrew MacNichol, Senior Planner; Sudeshna Chatterjee, Director of Equity and Inclusion; Kathryn Gallant, Reading Housing Authority Director; Catrina Meyer, Community Planning and Development Commission; Jacqueline McCarthy, Reading Select Board

**Date: February 13, 2023**

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## Introduction

A Housing Production Plan (HPP), defined in regulations at 760 CMR 56.03 and administered by the Department of Housing and Community Development (DHCD), is a proactive strategy for planning and developing affordable housing. The HPP identifies the housing needs of a community and the goals and strategies it will use to identify and achieve or maintain the 10% Subsidized Housing Inventory (SHI) threshold mandated by M.G.L. Chapter 40B. The Town's status relating to this 10% threshold is documented on the SHI, also administered by DHCD.

This HPP Program enables municipalities to develop a strategy to meet its affordable housing needs in a manner consistent with the MGL Chapter 40B statute, produce housing units in accordance with that plan, and demonstrate progress towards their affordable housing production. By taking a proactive approach in the adoption of a HPP, cities and towns are much more likely to achieve both their affordable housing and community planning goals. HPPs give communities that are under the 10% threshold of Chapter 40B, but are making steady progress in producing affordable housing on an annual basis, more control over comprehensive permit applications for a specified period of time. HPPs give communities over the 10% threshold a framework to maintain the statutory minima in accordance with local needs and community goals.

The Town of Reading places great importance on planning for affordable housing development through the HPP process. The Town of Reading's current Housing Production Plan was approved by DHCD on March 20, 2018 and will expire after a 5-year term on February 13, 2023, and as such, the Town of Reading has updated the Housing Production Plan ("HPP") herein, in accordance with 760 CMR 56.03(4).

Housing Production Plans can create a safe harbor for a community. When a municipality has a certified plan, decisions on comprehensive permit applications by the Zoning Board of Appeals (ZBA) to deny or approve with conditions will be deemed "consistent with local needs" under MGL Chapter 40B.

As of December 2022, Reading has achieved a 10% SHI threshold, as a result of meeting its previously planned production efforts. However, because of the fluidity of the SHI continued efforts are needed to maintain the threshold. As summarized below, a municipality may request that the DHCD certify its compliance with an approved HPP if it has created the required number of SHI Eligible Housing units in a calendar year.

Housing Production Plans are certified by the following process, as identified in the regulations:

- Prepare the HPP: In accordance with the regulations, write the plan, including a public process, and have the plan adopted by the Select Board and Community Planning and Development Commission

- DHCD Approval: Submit HPP to DHCD for approval
- Certify the HPP: Communities may seek DHCD certification of the HPP (safe harbor), if in a calendar year, affordable units (AFU's) are created as follows:
  - One-year Safe Harbor: – Create at least 0.5% of the total number of housing units in Reading (50 for Reading)
  - Two-year safe harbor – Create at least 1.0% of the total number of housing units in Reading (100 for Reading)
- Renew the HPP: The term of the HPP is five years from approval.

The Town of Reading's Public Services Department updated the Housing Plan with future planned housing, completed projects, census data and other demographic information as required by DHCD. DHCD regulates Housing Production Plans under 760 CMR 56.00, promulgated on February 22, 2008. HPPs are designed to create strategies to meet affordable housing needs that are consistent with Chapter 40B requirements. In order for the HPP to qualify for approval from DHCD, the plan must be comprised of three components: (1) Comprehensive Needs Assessment; (2) Affordable Housing Goals; and (3) Implementation Strategies.

- (1) Comprehensive Needs Assessment – an evaluation of a community's demographics, housing stock, population trends, and housing needs. The assessment will include a review of the development capacity, as well as constraints, to ensure that current and future needs can be met.
- (2) Affordable Housing Goals – defined housing goals consistent with both community character and the local housing market. This section will identify strategies that can be used to produce the required number of annual housing units needed to obtain the 10% statutory minima and safe harbor certification from DHCD.
- (3) Implementation Strategies – recommendations and targeted areas for future development that will enable a community to reach the affordable housing goals. This may include identifying sites for development or redevelopment, investigating re-zoning options to encourage the production of affordable housing units, and establishing other tools such as regional collaborations that can foster the development of affordable housing.

Once a community has achieved safe harbor certification, within 15 days of the opening of the local hearing for a Comprehensive Permit application, the Zoning Board of Appeals (ZBA) shall provide written notice to the Applicant, with a copy to DHCD, that a denial of the permit or the imposition of conditions or requirements would be consistent with local needs, the grounds that it believes have been met, and the factual basis for that position, including any necessary supporting documentation. If the Applicant wishes to challenge the ZBA's assertion, it must do so by providing written notice to the Department, with a copy to the Board, within 15 days of its receipt of the ZBA's notice, including any documentation to support its position. DHCD shall thereupon review the materials provided by both parties

**Commented [MA2]:** While true I need to confirm how it applies to 10%, if at all. We may wish to include language on Friendly 40Bs?

and issue a decision within 30 days of its receipt of all materials. The ZBA shall have the

burden of proving satisfaction of the grounds for asserting that a denial or approval with conditions would be consistent with local needs, provided, however, that any failure of the DHCD to issue a timely decision shall be deemed a determination in favor of the municipality. This procedure shall pause the requirement to terminate the hearing within 180 days.

### **Affordable Housing Highlights Since 2018 HPP**

- Continued lead of the Metro North Regional Housing Services Office to administer affordable requirements, including preserving existing affordable units, along with North Reading, Saugus and Wilmington. The City of Woburn joined the regional collaboration in 2019.
- Downtown Smart Growth District (DSGD) under Chapter 40R: Adopted in 2009 and expanded in 2017, five (5) 40R projects have been completed and occupied resulting in 192 total units, 43 of which (22.4%) are deeded as affordable units. A number of additional 40R development projects continue to go through permitting and construction; see Section B below for more information.
- 40B Project Approvals: In February 2017, the Zoning Board of Appeals (ZBA) approved a 68-unit rental housing project known as Reading Village, proposed next to the Reading Commuter Rail Station downtown. In July 2017, the ZBA approved a 20-unit rental housing project outside of the downtown area known as Schoolhouse Commons – an adaptive re-use of the former school building associated with St. Agnes church. In 2019 the Eaton Lakeview 40B was approved for a combination of 12 ownership units and 74 rental units.
- Through all of its planning efforts, Reading has added 177 units (and 1.77%) to its Subsidized Housing Inventory (SHI) since the 2018 HPP was implemented.

## **Executive Summary**

The Town of Reading continues to be a desirable place to live and work. It is characterized by a traditional New England center, surrounded by

**Commented [MA3]:** Can likely expand with our general language used in many other plans.

family-oriented neighborhoods. It has evolved over time from largely an outlying community with a strong agricultural presence to a modern residential suburb just north of Boston.

Reading's proximity to Boston has added to its attractiveness. The Town has worked to shape housing development and growth that complements the character of the community. The HPP identifies tools for Reading to use that will encourage the development of affordable housing while maintaining the distinct town character.

### **Summary of Demographic and Housing Characteristics**

The following summarizes the notable findings from the need's assessment section of the Housing Production Plan.

#### The Bottom Line:

Reading has grown slightly since 2010, with increases in population, the number of households, and housing units. In particular, the projected growth of the 65+ population is noted. Reading's median income has risen significantly, however, 33.1% of the population is low-income.

Housing cost burdened is an indicator that a household may be unable to afford other critical and nondiscretionary costs such as health and child care, food, and transportation. Locally, a total of

- 49.4% of Renters at or below 30% AMI are Cost Burdened
- 24.5% of Renters between 30% and 50% AMI are Severely Cost Burdened
- 22.7% of Owners at or below 30% AMI are Cost Burdened
- 8.8% of Owners between 30% and 50% AMI are Severely Cost Burdened
- 29.1% of all Reading households are cost burdened.

#### Population

- As of the 2020 US Census, the population of Reading is 25,510, an increase of 3% since 2010. In 2020, the largest age group of Reading's populations was 35-59 year old's (35.8% of total population). There was a 5.4% decrease in the 60+ year- old grouping but such is expected to rise in future years as residents in the 35-59 age cohort continue to age.
- The 2020 Census illustrates that 35.7% of Reading's households have children under 18-years old, and 13.5% have persons age 65+.
- The median age increased from 41.6 years old in 2010 to 44.1 years old in 2020.
- Racial make-up is predominantly white, at (87.2%) and the largest racial minority group in Reading is the Asian population (5.1%) followed by the Hispanic or Latino population at 2.8%. Only 1.3% of the population identifies as Black or African American.; 0.1% of the population are American Indian/Alaskan Native; .8% of the population identify as other; and 3.5% of the population identifies as Hispanic or Latino.

### Income

- The Town of Reading's 2022, median household income was \$133,300; approximately a 25% increase from 2015, and slightly lower than the Boston-Cambridge-Quincy Metro Area (\$140,200) but 10.7% higher than the state as a whole (\$120,400). (HUD)
- An estimated 32.7% of Reading households have incomes at or below 80% of AMI (Low/Moderate Income).
- 3% of Reading's population is below the poverty line (annual income below \$27,750 for a household of 4 based on 2022 FPL Guidelines), much lower than Middlesex County (7.1%) and Massachusetts (9.4%).
- Of the 7,560 of Reading households who own their homes, 22.5% are cost-burdened (spending over 30% of their income on housing), while 49.3% of Reading's renters are cost-burdened. 64.7% of Reading's low-income households are cost-burdened.

### Housing Stock, Sales and Prices

- 84.6% of Reading's housing units are owner occupied, with 15.4% renter occupied.
- The Town's housing stock remains primarily single-family at 76.7% of total housing units. The remaining 23.3% is: 6.4% of units are in two to four family buildings, 6.7% of units in 5-19 unit buildings, and 10.5% of units in multi-family buildings with 20 or more units.
- Currently, 10.49% (1,044 units) of Reading's total housing stock (9,952 units) is counted as affordable on the State's Subsidized Housing Inventory (SHI), which falls just above the State's minimum affordability goal of 10% by 74 units.
- Reading's 2022 median sale price of \$815,000 would require an annual income of approximately \$236,260 to not be considered cost-burdened, almost double Reading's median household income of \$133,300.
- The 2022 median price of single-family homes in Reading was \$815,000. The 2022 median price of all homes, including condos, was \$557,500. After a dip in prices during the national recession in the mid-2000's, housing prices have been rising steadily since 2012 and are now the highest they have ever been. Prices have increased by 72.2% since 2016.
- Based on the 2022 median single-family sale price, Reading's ownership affordability gap is \$430,000 for median income households, \$560,000 for low-income households, and \$705,000 for very-low-income households.
- Based on current median rents, rental units in Reading are out of reach for low income households. In addition, there are not very many rentals available.

### **Goals for Affordable Housing Production**

Reading has identified housing goals that are the most appropriate and most realistic for the community. These goals were developed by reviewing previous studies and documents (including the Reading Housing Plan of 2018), analyzing the current housing situation in Reading, and through public input from town citizens and officials.

The Established goals are categorized into three areas of need and are as follows:

Commented [MA4]: Do we need this here?



**1. Development and Regulations**

- a) Increase, diversify and promote a mix of housing options in Reading for low- to middle-income households.
- b) Create and maintain housing that is available and accessible to aging and disabled populations. Support housing development needs for most vulnerable residents.
- c) Proactively plan for and manage the integration of housing growth to mitigate impacts and enhance the existing residential character of the Town.
- d) Provide equitable access to housing opportunities, public spaces, green spaces and healthy/safe environments.
- e) Maintain Reading’s Safe Harbor designation by retaining pace of Affordable Housing development in order to remain above 10% on Subsidized Housing Inventory.

**2. Funding and Resources**

- a) Support vulnerable, low- and middle-income populations through programming and services.
- b) Ensure appropriate maintenance and upkeep of existing affordable housing stock. Continue to look for opportunities to increase affordable units within existing properties.
- c) Maintain and see national/state/local designations that provide grant and financial opportunities to develop/maintain/support affordable housing development and residents.
- d) Ensure equitable access to financial/support services and programming.

**3. Partnerships, Education and Leadership**

- a) Initiate and strengthen local and regional relationships. Work in cooperation and collaborate with community partners/organizations to promote enhanced understanding of housing needs and support for creation of housing development.
- b) Increase capacity to produce housing through leadership developments, advocacy, staffing, funding, established goals and diverse relationships. Provide education and support to local staff, boards/commissions and public.
- a)c) Ensure access, support, outreach and inclusion to social and vulnerable populations across the Town and region.

**Commented [MA5]:** We should also include language to partner to raise awareness of programming and services available.

## Section 1: Comprehensive Housing Needs Assessment

The Housing Needs Assessment examines demographic and population data and trends from available sources such as the Census, regional planning agencies, media, etc., that illustrates the current demographic and housing characteristics for the Town of Reading. Assessing needs will provide the framework for the development of housing production strategies to meet affordable housing goals.

### A. Demographic Analysis

The purpose of analyzing demographics is to look at quantitative and qualitative trends and use the data for future planning. This section provides an overview of Reading's demographics and how they have changed over time. As the demographics change in the future, the housing needs of the community can also change. The size and type of families as well as householder age and economic status all influence the needs of the community. The analysis of the Housing Needs Assessment will provide a guide to identify goals and strategies for this plan.

#### 1. Total and Projected Populations:

In the last ten years, the Town of Reading has had a 3% increase in population. Over the next 10 years, the population is expected to experience a slight decline before having a minor increase by 2030 as well as another increase in 2040. The total number of households in Reading has increased and is expected to only have minor increases through 2030 and 2040. Similar to the national trend, Reading's average household size has decreased in the past ten years. In 1999 the average household size was 2.84 and decreased to 2.71 in 2010. In 2020 the average household size was 2.67. Smaller household size is consistent with communities experiencing slow but steady growth.

**Table 1: Total and Projected Populations: 2000-2040**

Year	Population	% Change	Households	% Change
2000	23,708	5%	8,688	10%
2010	24,747	4.4%	9,305	7.0%
2020	25,510	3%	9,374	.7%
2030	26,222	2.7%	10,806	8.7%
2040	28,139	6.8%	11,221	3.84%

Source: 2020 US Census and MAPC MetroFuture 2050

Update, January 2014, May 2022, Donahue Institute at UMASS

## 2. Household Types:

There were a total of 9,952 households in Reading in 2020, with 70.7% family households, and 28% non-family households in Reading. The non-family households include single person households or persons living in the same household who are not related. The presence of a mix of family and non-family households indicates that there is likely a need for a variety of housing types that may not fit the traditional single-family home model. The data reflects 2,789 non-family households. This may suggest a need for affordability options for non-family households who may have special housing needs.

**Table 2: Household Types: 2020**

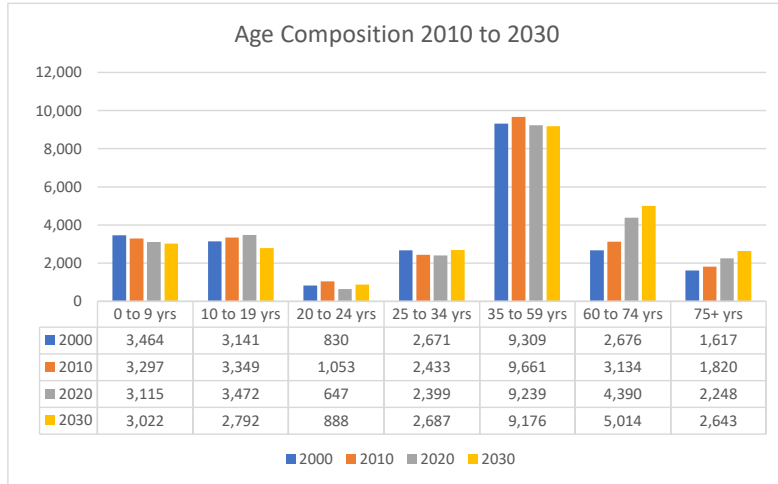
Household Type	2020	Percentage
<b>Family Households:</b>	7,032	70.7%
With own Children under 18 years	6,187	62.2%
Married, Husband-wife family:	5,580	56.1%
With own children under 18	5,560	55.9%
Male householder, no wife present	89	.9%
With own children under 18 years	31	.3%
Female householder, no husband present	365	3.7%
With own children under 18 years	341	3.4%
<b>Nonfamily households:</b>		
Householder living alone	2,789	28%
Householder 65 and over living alone	1,263	12.7%
Average household size	2.67	
Average family size	3.16	
Total Households	9,952	

Source: 2020 US Census

Other important factors to consider when assessing housing needs are household size and the age composition of residents. Household size is an important factor as it can help determine the demand for certain types of housing. Similarly, analyzing the age composition of a community over time can help develop trends for housing needs. For example, established families with children living at home have different housing needs than an empty nester and or someone who is over 65.

MetroFuture is a regional plan developed by the Metropolitan Area Planning Council (MAPC) that addresses future growth in the Boston metropolitan region until 2030. Figure 1 summarizes Reading’s age composition from 2020 and includes MetroFuture projections until 2030. Table 3 illustrates this in more detail.

**Figure 1: Age Composition of Residents, 2000 – 2030**



Source: 2020 US Census and MAPC MetroFuture 2050 Update, January 2014, May 2022, Donahue Institute at UMASS

**Table 3: Current and Projected Age Distribution of Residents: 2000-2030**

Age Cohorts	2000		2010			2020			2030			% Change from 2000-2030
	Number	%	Number	%	% Change	Number	%	% Change	Number	%	% Change	
0 to 9 years	3,464	14.6	3,297	13.3	-4.8	3,115	12.3	-5.5	3,022	11.5	-3.0	-12.8
10 to 19 years	3,141	13.2	3,349	13.5	6.2	3,472	13.8	10.5	2,792	10.6	-19.6	-11.1
20 to 24 years	830	3.5	1,053	4.3	26.9	647	2.6	-22.0	888	3.4	37.2	7.0
25 to 34 years	2,671	11.3	2,433	9.8	-9.0	2,399	9.4	-11.0	2,687	10.2	13.1	.6
35 to 59 years	9,309	39.3	9,661	39.0	3.8	9,239	36.2	-1.8	9,176	35.1	.4	-1.4
60 to 74 years	2,676	11.3	3,134	12.7	17.1	4,390	17.2	62.2	5,014	19.1	15.5	87.4
75+ years	1,617	6.8	1,820	7.4	12.6	2,248	8.5	32.8	2,643	10.1	23.0	63.5
Total Population	23,708	100	24,747	100		25,510	100		26,222	100		

Source: 2020 US Census and MAPC MetroFuture 2050 Update, January 2014, May 2022, Donahue Institute at UMASS

MAPC’s MetroFuture plan suggests that Reading’s population will have a minor increase in overall population for the next 10-20 years. However, it is anticipated that a significant change in the composition of the age groups will occur. Based on the MetroFuture projections, the youngest age groups are expected to continue to decline by 2030; ages 0-9 (-3%), and ages 10-19 (-19.6%). The age groups from 20-24 and 25-34 are expected to increase by (37.2%) and (13.1%) respectively. However, the 35-59 age group is expected to remain the largest age group in Reading and is projected to comprise 35.1% of the population in 2030, with the 60-75+ age group following close behind at approximately 29.2% of Reading’s population in 2030.

In 2020 the largest age cohort in Reading was those aged 35-59 (36.2%). People in this age group are likely to be in an established family household with a larger home than the younger age groups. The next concentration of residents was the next age group; those aged 60-74 years (17.2%) and those aged 10-19 years (13.8%) made up the third largest age cohort. The following age groups experienced a decline in 2020: 0-9 years, 20-24 years, and 25-34 year old’s between 2010 and 2020. The elderly population also increased from 2010 to 2020. Persons aged 60-74 experienced a population increase of 17.2% and those aged 75+ increased by 8.5%.

The data shows that the second largest age group in 2030 will be those aged 60-74 with an increase of 60% from 2010 to 2030. Even though the childhood age groups of 0-9 and 10-19 are expected to decrease by 2030, collectively they will make up almost one-fourth of the population (22.2%). Adults who will be aged 25-34 are expected to grow slowly by 2030, only increasing by .6%.

By contrast, the elderly population (ages 75+) which comprises 8.5% of Reading residents is expected to increase by 23% in the next 10 years. When combined with the 60-74 age group (29.2%), the 60-75+ age group will consist of approximately 38.5% of Reading's population. This is not surprising as the "baby-boomer" population is contained within this age group. It is important to be aware of this trend as this population tends to prefer smaller housing units with less upkeep. Elderly residents could have special housing needs such as nursing homes and assisted living facilities.

Adults aged 20 to 24 years and 25 to 34 years are expected to make up approximately 13.6% of the population in 2030. These age groups are more likely to make up younger families who will purchase a starter home that is smaller and more affordable. In the next twenty years, as the 35-59 age group moves into the next age group, the stock of larger traditional family homes (detached, single-family units) may become more available. This may allow the younger population to trade up or take advantage of the larger homes.

The analysis of population projections is vital for planning and determining future housing needs. With the expected increase in the older population, planning efforts should consider the need for smaller housing units with less maintenance, senior housing or assisted living facilities. As the middle-age population shifts into the older age groups the demand for larger, traditional family housing units will be reduced and will increase the opportunity for younger families looking to trade-up to more of those homes now available.

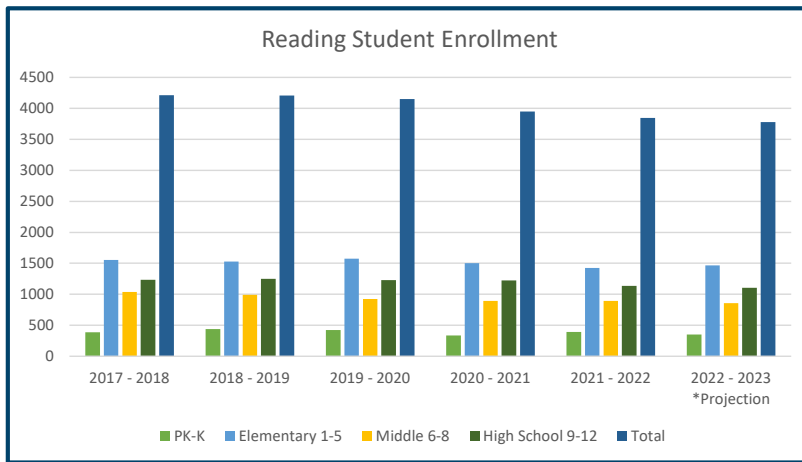
### **3. School Enrollment and Projections**

The 2018 HPP included projections on enrollment which were available at that time. Figure 2 provides six years of enrollment data which is the only data that is available for inclusion in the updated 2023 HPP.

Figure 2 illustrates public school enrollments from 2017 through 2023\* (\*projection for the current school year). Overall, Reading school enrollment numbers have remained somewhat stable in recent years with an overall decrease of 10.3% since 2017. Although total population projections predict a continuing decrease in school aged children by the year 2030, this age group will still comprise 22.2% of the total population.

**Figure 2: Reading Student Enrollment**

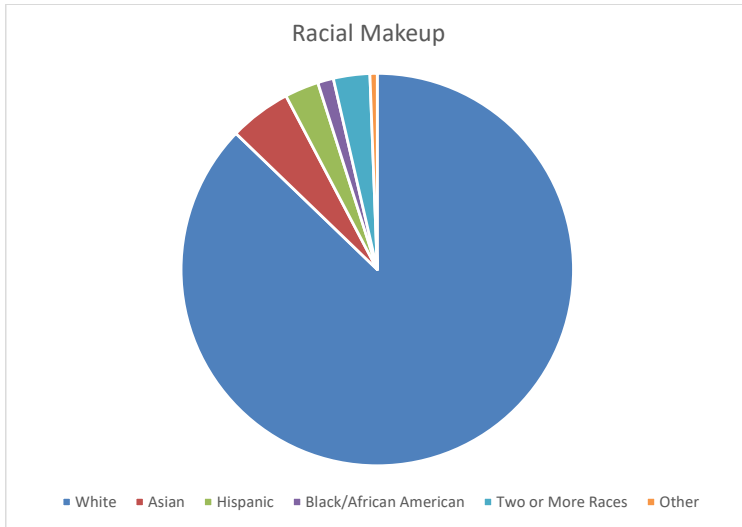
School Year	PK-K	Elementary 1-5	Middle 6-8	High School 9-12	Total
2017 - 2018	387	1,552	1,039	1,235	4213
2018 - 2019	440	1,529	990	1,251	4210
2019 - 2020	423	1,574	924	1,230	4151
2020 - 2021	335	1,500	894	1,222	3951
2021 - 2022	393	1,427	891	1,135	3846
2022 - 2023 *Projection	352	1,465	859	1,102	3778
% Change	-9%	-5.60%	-17.30%	-10.8%	



Source: Reading School Committee yearly School Budgets and FY 2022 School Budget  
 \*Reading School Department as of 8/16/2022

**4. Race and Ethnicity:**

- According to the 2020 U.S. Census, the majority of Reading residents are white (87.2%) and the largest racial minority group in Reading is the Asian population (5.1%) followed by the Hispanic or Latino population at 2.8%. Only 1.3% of the population identifies as Black or African American.
- 0.1% of the population are American Indian/Alaskan Native; .8% of the population identify as other; and 3.5% of the population identifies as Hispanic or Latino.



## 5. Residents with Disabilities

According to the 2014-2018 American Community Survey, 3,026 people in Reading reported living with a long duration condition or disability. Of those people, approximately 73.1% were aged 65 and older. As this population continues to increase, it is assumed that the number of disabled individuals within this age group will also rise. Many disabled residents require special housing needs, including certain accommodations for housing design (physical accessibility) and reasonable access to goods and services. Consideration for these types of housing options is necessary, as the demand will continue to increase.



**Table 5: Residents with Disabilities**

<b>Age</b>	<b>Number</b>	<b>Percent of All Disabled Residents</b>
5-17	350	11.6
18-64	464	15.3
65 +	2,212	73.1
Total Population of Disabled Residents	3,026	100

*Source: 2014-2018 American Community Survey*

## 6 Income Analysis:

### 1. Median Household Income:

In 2022 Reading’s median household income of \$133,300 represented an increase of 42.4% from 2010. Median household income in Reading was one of the highest among adjacent neighboring communities and exceeded the median for the Boston-Cambridge-Quincy Metro area, as well as the median for the Commonwealth of Massachusetts and the US. All the adjacent neighboring communities also experienced significant increases in household income from 2010.

**Table 6: Median Household Income: 2010-2022**

Town	2010	2015	2022	% Increase 2010-2022
Reading	77,059	106,764	133,300	42.2%
North Reading	76,962	145,366	138,237	44.3%
Wilmington	70,652	116,155	114,394	38.3%
Woburn	54,897	78,242	97,895	43.9%
Stoneham	56,650	80,703	102,542	44.8%
Wakefield	66,117	85,097	107,898	38.7%
Lynnfield	80,626	120,680	143,661	43.9%
Boston-Cambridge-Quincy, MA Metro Area <sup>1</sup>	62,700	98,500	140,200	55.3%
Massachusetts	50,502	87,300	120,400	58.1%
US	41,994	56,516	67,521	37.8%

Source: 2020 US Census & 2014-2018 American Community Survey [FY 2022 Income Limits Documentation System -- Summary for Reading town, Massachusetts \(huduser.gov\)](#), Policy Map

### 2. Median Income of Senior Households:

Although Reading’s overall population has experienced a large increase in income in the past 12 years and is earning in line with the surrounding communities (as displayed in Table 6 above), Reading’s 65+ households are not doing nearly as well. Unfortunately, in 2022 we see that Reading’s senior households have significantly lower incomes than households overall. As displayed in Table 7 below, Reading senior households earn less than all of the surrounding communities and just slightly more than Massachusetts and the country overall. In fact, households earning the median senior income of \$56,276 would qualify for certain affordable housing based on the income limit guidelines described in Section 4 below, “Area Median Income.” This data makes clear that affordable housing for the senior population will be a significant need in the coming years due to the projected increase in the senior

population in Reading as demonstrated in Figure 1 and Table 3 above, and due to the limited income of this group.

**Table 7: Median Income of 65+ Households: 2020**

Town	2020
Reading	56,276
North Reading	66,321
Wilmington	69,825
Woburn	58,447
Wakefield	71,537
Lynnfield	70,859
Massachusetts	52,973
US	46,360

Source: 2020 Census

**3. Income Distribution:**

Table 8 identifies and compares the distribution of Reading household incomes from 2010 and 2020. In 2010, nearly half of all households (48.2%) earned less than the household median of \$77,059. In 2020, 41.2% of households earned less than the household median of \$133,300. Of the households earning over the median income in 2020, 64.2% of households earned more than \$100,000 in 2020. Reading households earned much more in 2020. Approximately 46.5% earned more than \$150,000 which was over the 2020 median income of \$133,300. Of those earning more than \$100,000 approximately 29.7% are earning more than \$200,000, a 100.2% increase from 2010. By 2020, the number of households in the highest income brackets have increased, with those making between 150,000 - \$199,999 increasing by 17.7% since 2010. However, there have been significant decreases in the lower income brackets (\$15,000-\$24,999, \$25,000-\$34,999, and \$35,000-\$49,999) between 2010 and 2020. Approximately 1,520 Reading households (16.3% of all households) earned less than \$50,000 in 2020.

**Commented [MA6]:** I am a bit confused by this statement – do we mean they made \$100k over the median income? If they are over the median income they would all be over \$100,000 in general, no?

**Commented [NL7R6]:** I edited some of the wording to make it clearer.

**Table 8: Income Distribution: 2010, 2015, 2020**

Income Category	2010		2015		2020		% Change 2010-2020
	# of Households	Percent	# of Households	Percent	# of Households	Percent	
Less than \$10,000	231	2.4	218	2.4	67	.7	-71.0%
\$10,000 to \$14,999	251	2.8	224	2.4	30	.3	-88.0%
\$15,000 to \$24,999	386	4.3	446	4.9	369	4.1	-4.4%
\$25,000 to \$34,999	470	5.3	553	6.0	219	2.3	-53.4%
\$35,000 to \$49,999	620	7.0	623	6.8	835	8.9	-34.7%
\$50,000 to \$74,999	1,214	13.7	974	10.6	1039	11.1	-14.4%
\$75,000 to \$99,999	1,327	15.0	1,158	12.6	783	8.4	-41.0%
\$100,00 to \$149,999	2,158	24.3	2,250	24.5	1653	17.7	-27.6%
\$150,000 to \$199,999	1,086	12.2	1,345	14.7	1583	16.8	17.7%
\$200,000 or more	1,157	13.0	1,377	15.0	2757	29.7	100.2%
<b>Total Households</b>	<b>8,882</b>	<b>100.0</b>	<b>9,168</b>	<b>100.0</b>	<b>9,335</b>	<b>100.0</b>	

Source: 2020 and 2010 US Census, 2014-2018 American Community Survey

#### 4. Area Median Income

One way to determine the need for affordable housing is to evaluate the number of households that qualify as low/moderate income by the U.S. Department of Housing and Urban Development (HUD). The Area Median Income (AMI) is a number that is determined by the median family income of a Metropolitan Statistical Area (MSA) and thresholds established by HUD are a percentage of AMIs. Reading is included in the Boston-Cambridge-Quincy Metropolitan Fair Market Rent (FMR) area. FMRs are gross rent estimates that include the rent plus the cost of tenant-paid utilities<sup>2</sup>. Section 8 of the United States Housing Act of 1937 authorizes housing assistance to lower income families and the cost of rental homes are restricted by the FMR thresholds established by HUD.

<sup>2</sup> U.S. Department of Housing & Urban Development Office of Policy Development & Research July 2007 (rev.)

Typically, thresholds are 80%, 50% and 30% of AMI and vary depending on the household size. HUD defines low/moderate income as follows:

- “low income” - households earning below 80% of AMI;
- “very low income” – households earning below 50% of AMI;
- “extremely low income” - households earning lower than 30% of AMI.

**Table 9: Income Limits by Household Size, Boston-Cambridge-Quincy, Reading: 2022**

Income Limit Area	Median Income	Income Limit Category	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person
Boston-Cambridge-Quincy Metropolitan MSA	\$140,200	Low (80%) Income Limit	\$78,300	\$89,500	\$100,700	\$111,850	\$120,800	\$129,750
		Very Low (50%) Income Limit	\$49,100	\$56,100	\$63,100	\$70,100	\$75,750	\$81,350
		Extremely Low (30%) Income Limit	\$29,450	\$33,650	\$37,850	\$42,050	\$45,450	\$48,800

Source: U.S. Department of Housing and Urban Development <http://www.huduser.org/portal/>

As shown in Table 9, the AMI for the Boston-Cambridge-Quincy FMR area, effective April 18, 2022, is \$140,200. Using this number, the income thresholds for various household sizes were determined. For a 3-person household, household incomes lower than \$37,850 are considered extremely low income, household incomes lower than \$63,100 are considered very low income, and household incomes lower than \$100,700 are considered low income. The Reading income category data presented in Table 8 is not available by household size, but assuming a 3-person household, as of the 2018 ACS, there were probably about 3,000, or almost one-third of households, that were likely eligible for subsidized housing according to HUD.

<sup>3</sup> AMI data for 2022 was used in this plan to compare to 2014-2018 ACS income data. AMI data for 2022 can be found at: [www.huduser.org/portaldatasets](http://www.huduser.org/portaldatasets)

## 7. Housing Stock Analysis

### 1. Housing Units and Types

The predominant housing type in Reading continues to be single-family homes. In 2015, there were approximately 9,653 total housing units, 70.7% of which were 1-unit, detached homes (single-family homes). Only 10.6% of housing structures contained 20 or more units; however, this type of housing was the second largest in Reading in 2015. Similarly, in 2020 single unit detached homes remained the predominant housing type, though the percentage of total homes dropped a bit. Meanwhile, the number of housing units in structures with 20 or more units dipped from 1,027 units (10.6% of total units) in 2015 to 1,007 units (10.5% of total units) in 2020.

**Table 10: Total Number of Housing Units by Structure: 2015 and 2020**

Housing Units Per Structure	2015		2020	
	Number	Percent	Number	Percent
1-unit, detached	6,827	70.7	7,217	72.5
1-unit, attached	395	4.1	248	2.5
2 units	535	5.5	341	3.4
3 or 4 units	192	2.0	279	2.8
5 to 9 units	280	2.9	290	2.9
10 to 19 units	397	4.1	350	3.5
20 or more units	1,027	10.6	1,227	12.4
Mobile Home	0	0	0	0
<b>Total</b>	<b>9,653</b>	<b>100.0</b>	<b>9,952</b>	<b>100.0</b>

*Source: 2020 US Census and 2014-2018 American Community Survey*

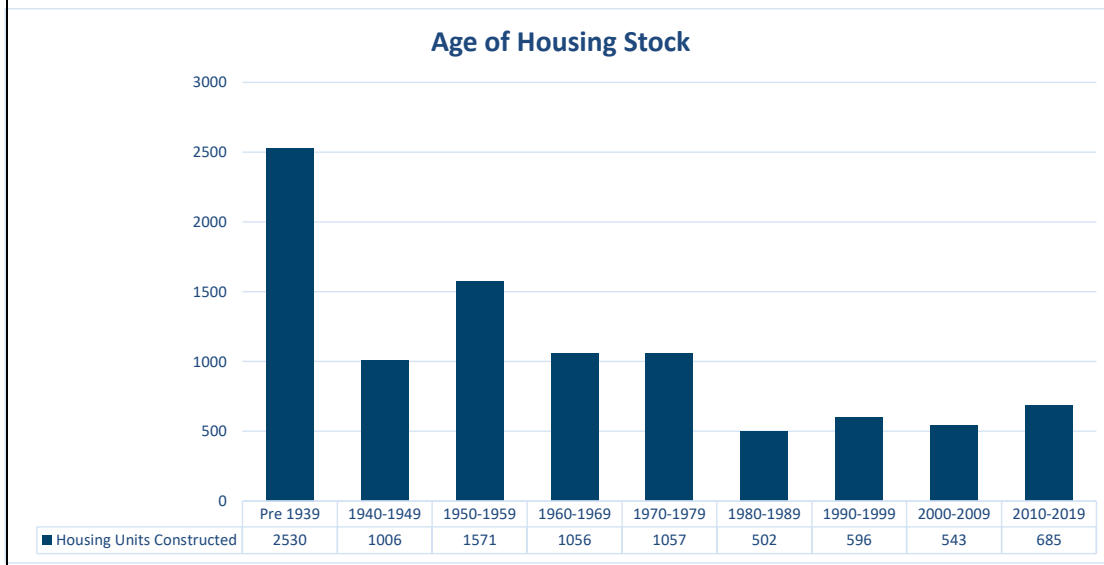
## **2. Housing Tenure**

According to the 2020 US Census, there were a total of 9,584 occupied housing units, 84.6% of which were owner-occupied, and 15.4% of which were renter-occupied. By 2020, the percentage of owner-occupied housing units increased to 6.4% above the 2015 numbers, and the percentage of renter-occupied housing units have decreased by 6.4% to 15.4%. Section B of this HPP discusses household types and the prevalence of non-family households in Reading. In particular, ACS and 2020 Census data shows that non-family households, specifically elderly, non-family households are growing in number. The data also show that non-family households are more likely to be renters, so these demographic changes could provide some of the reason for the recent increase in renter-occupied units. The demand for rental housing is likely to continue increasing as the population continues aging and this aging population is likely to include many who are looking to down-size or spend less on housing related costs.

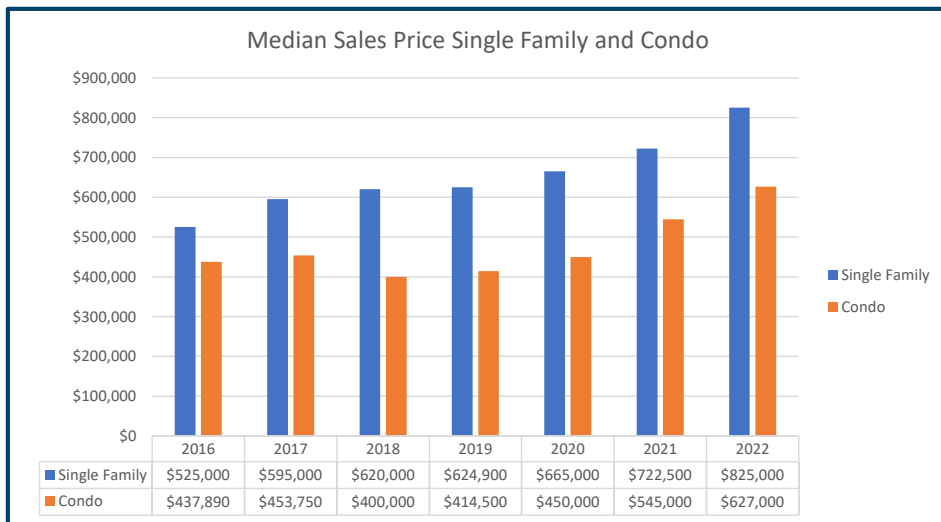
### 3. Age of Housing Stock

Reading has a large stock of older and historic homes. Over half of the housing units were constructed prior to 1960 and of that 33% were constructed prior to 1940. The production numbers have been on a steady decline since 1970, there was a small increase between 2000-2009 and have dipped again after the housing market crash of 2008. As these homes contribute to the town's character, many of them are also in need of repairs and renovations. Multi-generational living is now an easier option due to recently adopted zoning changes that facilitate creating accessory dwelling units in single-family homes.

Figure 3: Age of Housing Stock







Source: 2020 US Census

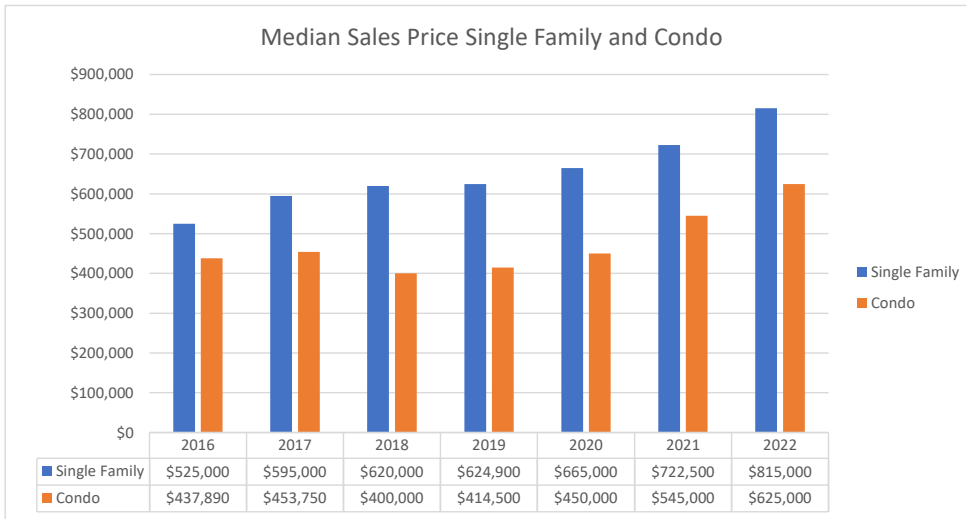
#### 4. Housing Market Conditions:

##### a. Median Selling Prices

Since 2012 Reading has seen a steady rise in sales prices. Figure 4 indicates the median single-family home price in 2016 was \$525,000. Prices have steadily increased year over year since 2016. In 2020 the median single-family sales price was \$665,000, in 2022 the median sales price has skyrocketed to \$815,000. This is an increase of 24.4% since 2020. Condominium sales followed a similar pattern with a few years of lower prices followed by a steady increase in prices beginning in 2012. In 2020 the median condominium sales price was \$450,000, in 2022 the median sales price as of December 31, 2022, was \$625,000. Condominium sales increased by 38.9% from 2020 to 2022.

Commented [NL8]: Added updated sales data through 12/31/22

**Figure 4: Median Sales Price of Single-family Homes and Condos 2016-2022**



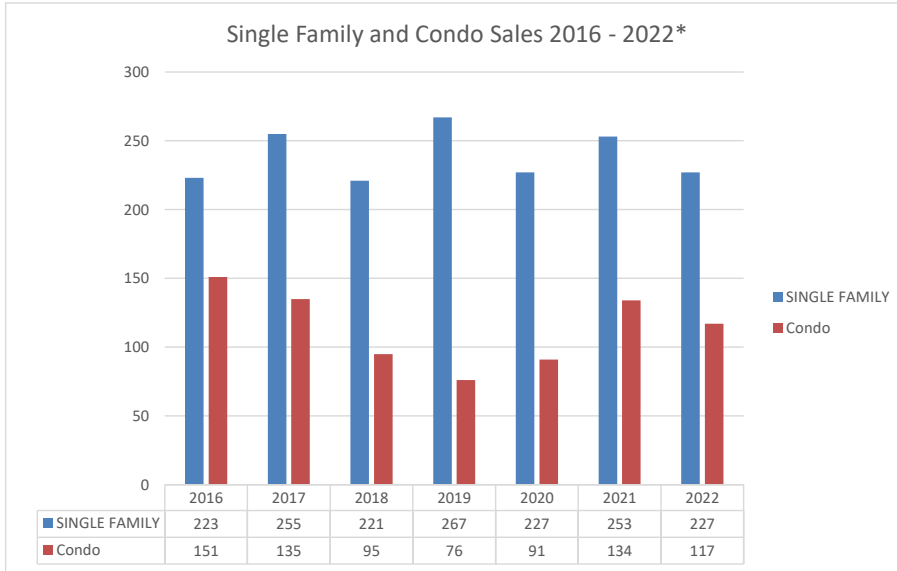
Source: Massachusetts Association of Realtors – As of 12/31/2022

**b. Home Sales**

As shown in Figure 5 below, Reading home sale numbers of both single-family homes and condominiums have held steady since 2016. Then, in 2018, the number of sales began to increase at the same time that prices began to increase. The number of condo sales have decreased consistently since 2016.

Commented [NL9]: Switched graphic to reflect end of year data

**Figure 5: Total Number of Single-family Home and Condo Sales 2016-2022**



Source: Massachusetts Association of Realtors - \* As of 12/31/2022

Commented [NL10]: Switched graph to reflect end of year data.

**c. Rental Prices:**

The cost of rental units is an important factor to consider when evaluating the housing market. Back in 2010 the median rent in Reading was \$1,032, the second lowest of all the neighboring communities that abut Reading. By 2020, median rent increased by 32.1% to \$1,363, the second highest increase amongst neighboring communities. One possible reason for the substantial rent increase may be due to the increase in the population group more likely to rent, creating more demand for rental units. High home prices may also force more households to rent. This trend is seen in the neighboring communities as well as all experienced substantial increases in median rent between 2010 and 2020.

**Table 11: HUD Fair Market Rent and Median Rent 2010, 2015, 2020 for Reading and Neighboring Communities**

<b>Final FY 2023 FMRs By Unit Bedrooms</b>				
<b>Efficiency</b>	<b>One-Bedroom</b>	<b>Two-Bedroom</b>	<b>Three-Bedroom</b>	<b>Four-Bedroom</b>
\$2,025	\$2,198	\$2,635	\$3,207	\$3,540

<b>Median Rent</b>	<b>2010</b>	<b>2015</b>	<b>2020</b>	<b>% Change, 2010 to 2020</b>
Reading	1,032	1,282	1,363	32.1%
North Reading	1,289	1,482	1,696	24.0%
Wilmington	1,567	1,624	2,009	22.0%
Woburn	1,187	1,331	1,763	32.7%
Stoneham	1,161	1,289	1,522	23.7%
Wakefield	1,042	1,203	1,513	31.1%
Lynnfield	623	1,443	1,742	279.1%

*Source: 2020 US Census, 2011-2015 and 2014-2018 American Community Survey*

## **5. Housing Affordability Analysis:**

### **1. Cost Burden**

One way to evaluate housing affordability is to examine the ability of households to pay mortgage or rent as a percentage of annual income. Households who pay 30% or more of their annual income on housing costs<sup>5</sup> are considered to be housing cost-burdened. Households who pay 50% or more of their income on housing costs are considered severely burdened. This analysis may help determine how “affordable” it is to live in a particular community.

The US Census Bureau prepares custom tabulations of American Community Survey (ACS) data that demonstrate the extent of housing problems and housing needs.

These data tabs are known as the Comprehensive Housing Affordability Strategy or CHAS data. Table 13 below uses CHAS data to show housing cost burden for renters and homeowners. Approximately 22.5% of owner-occupied households, and 50.3% of renter households, in Reading are paying more than 30% or more of their annual household income on housing related costs. Therefore, a total of 2,510 of 9,956 households (26.9%) in Reading may have difficulty paying their housing-related costs and are considered moderately to severely housing cost-burdened. However, through the community engagement process and update census data there are approximately 29.1% households in the Town of Reading that are moderately to severely cost burdened.

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<sup>5</sup> Costs for homes with a mortgage include all forms of debt including deeds of trust, land contracts, home equity loans, insurance, utilities, real estate taxes, etc. Source: US. Census

**Table 12: Monthly Housing Cost as a Percentage of Annual Household Income**

	Households in Reading	<= 30% of income spent on housing		>30% to <=50% of income spent on housing		>50% of income spent on housing	
		Number	Percent	Number	Percent	Number	Percent
Owners	7,560	5,830	77.1%	1,055	14.0%	675	8.5%
Renters	1,550	760	49.0%	385	24.8%	395	25.5%

Source: 2014-2018 CHAS data

CHAS data also shows how rent burden impacts households at different income levels. Table 13 below shows a greater percentage of low-income households are housing cost-burdened than higher income households. 3,065 of 6,070 (50.5%) households who earn less than 80% AMI are housing cost-burdened. However, in comparison 760 of 6,070 (12.5%) households who earn more than 100% AMI are housing cost-burdened. This indicates a need for more housing in Reading that is affordable to low-income households, so they do not experience such a substantial level of cost burden.

**Table 13: Housing Cost Burden According to Income Level**

Household Income Level	Spending >30% of income on housing costs	Spending >50% of income on housing costs	Total Households
<=30% AMI	670	535	1,260
>30% - <=50% AMI	630	275	905
>50% - <=80% AMI	410	155	900
>80% - <=100% AMI	270	25	655
>100% AMI	760	35	6,070
<b>Total</b>	<b>2,740</b>	<b>1,025</b>	<b>9,374</b>

Source: 2014-2018 CHAS data

## 2. Home Ownership Affordability – Gap Analysis

Another way to measure the affordability of a community is to assess the affordability of home ownership. To do so, the income of the buyer must be evaluated against the sales price of the home. The gap between the sales price and the purchasing ability of a potential home buyer is called the “gap analysis”.

As mentioned, the median sales price of a single-family home in Reading in 2022 was \$815,000. A household would have to earn approximately \$236,260 to afford such a home, using the assumptions from table 14 below, without being cost burdened. This income almost double Reading’s median household income of \$133,300 for 2022, and higher than the area median income (Boston-Cambridge) of \$140,200 by over \$96,060. A household looking to purchase a condo would still need to earn approximately \$190,506, using the assumptions from table 14 below, to afford \$625,000 – the 2022 median sales price of a condo in Reading.

**Commented [NL11]:** Updated sales prices and incomes to reflect updated assumptions.

A household earning the 2022 median income of Reading of \$133,300 can afford a single-family home priced at about \$385,000, using the assumptions from table 14 below, resulting in an “affordability gap” of \$430,000. The gap widens for low-income households. A 3-person household earning 80% of AMI or \$100,700 can afford a home costing no more than \$255,000. A 3-person household earning 50% of AMI at \$63,100 could afford a home costing no more than \$110,000. Table 15 shows the affordability gap in Reading for households at different income levels.

**Table 14: Gap Analysis – Single-Family Home**

Income Level	Income	Affordable Purchase Price	Estimated Monthly Payment	Gap +/- from Median Sales Price	2022 Median Sales Price	Estimated Monthly Mortgage Payment for Median Priced Home
Reading Median Income	\$133,300	\$385,000	\$3,473	\$430,000	\$815,000	\$6,234
Low Income (80 AMI%) (3-person HH)	\$100,700	\$255,000	\$2,638	\$560,000		
Very Low Income (50 AMI%) (3-person HH)	\$63,100	\$110,000	\$1,706	\$705,000		

**Commented [NL12]:** New chart added with updated numbers based on updated assumptions.

**Affordable Purchase Price Calculation Assumptions**

**Interest Rate – 6.375%**

**Down payment – 3.5% down**

**Taxes - \$10,000**

**Includes PMI @ .5%**

**Insurance - \$2,000 year**

*\*For illustrative purposes only, affordability can change dependent upon interest rate and debt to income ratio.*

**Commented [NL13]:** Updated to current numbers, today's rate, increased taxes and debt.

Source for income limits: U.S. Department of Housing and Urban Development  
<http://www.huduser.org/portal/> Median Sales price used from 2022 MAR data - \$815,000

Housing affordability continues to be a major roadblock for market participants, with mortgage rates more than double compared to this time last year. Buyers are delaying home purchases in hopes rates will drop, while many sellers are holding off on listing their homes due to weakening buyer demand, unwilling to trade in their current lower rates for significantly higher borrowing costs on their next property. As a result, existing-home and pending home sales have continued to slow as we move into 2023.

With home sales down, nationwide housing inventory was at 3.3 months' supply heading into November, up from 2.4 months from this time last year, according to the National Association of REALTORS®. Although buyers have more options to choose from, home prices remain high, and soaring borrowing costs have caused monthly payments to increase significantly, with the average homebuyer paying 77% more on their loan per month compared to the same period a year ago, according to Realtor.com.

**Commented [NL14]:** Added some info to catalog the current housing market. Affordability was way higher before rate hikes.

### 3. Rent

Another measure of housing affordability is whether local rent exceeds HUD-determined Fair Market Rents (FMR) which were established as guidelines for Section 8 voucher holders. HUD does not permit voucher holders to rent apartments above the FMR because HUD has determined the FMR to be a fair and reasonable price for the geographic area. Table 16 below identifies the FY22 FMRs for the Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area. As Table 11 above shows, the median rent paid by Reading households in 2020 as reported by the Census was \$1,363, indicating that households are paying less than the FMR for the Boston-Cambridge-Quincy area (assuming a 1-bedroom). However, the 2020 Census indicates that 44.2% of renters in Reading were paying \$1,500 or more in monthly rent, of that number 16.4% of renters were paying more than \$2,000 in monthly rent.

Through the Town's community engagement process the Town conducted an analysis of what hourly wages someone would need to earn in order to afford the fair market rent in Reading. The results of that analysis are below in table 16 A.

<sup>6</sup> Figures derived using a Mortgage Calculator, including a 5% down payment, 30-year fixed mortgage at 4.1% interest rate, and Reading's 2021 tax rate.

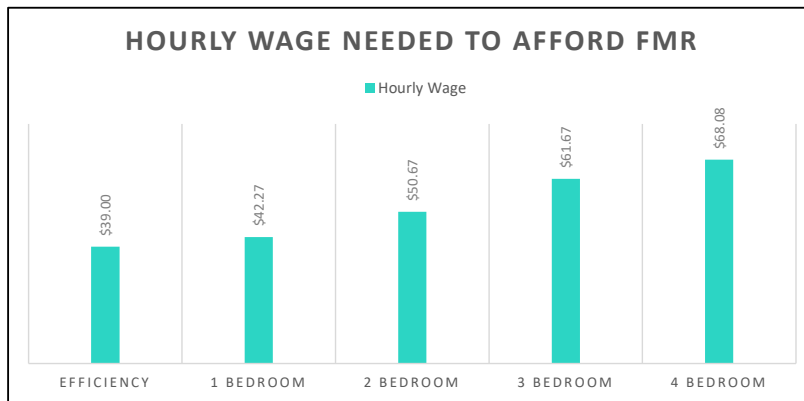


**Table 16: Fair Market Rents, Boston-Cambridge Quincy, MA-NH HUD Metro Area**

	Efficiency	1-Bedroom	2-Bedroom	3-Bedroom	4-Bedroom
Fair Market Rent 2018	\$1,253	\$1,421	\$1,740	\$2,182	\$2,370
Fair Market Rent 2023	\$2,025	\$2,198	\$2,635	\$3,207	\$3,540
% Change 2018 vs. 2023	61.6%	54.7%	51.4%	47%	49.4%

Source: U.S. Department of Housing and Urban Development, <http://www.huduser.org/portal/>

**Table 16A: Hourly Wage needed to afford FMR:**



ACS data looks at all current renters, including some who may have been renting for a long time without a rent increase, they do not necessarily paint an accurate picture of the current rental market. An examination of rental listings on Trulia on August 31, 2022, gives a more accurate assessment. Based on these listings in Table 17 below, we can see that there is not much available rental housing – there were only 14 listings on Trulia on August 31<sup>st</sup>, 2022. In addition, the median rents of homes currently listed are slightly higher than the median rent reported by ACS, and also slightly higher than the HUD FMRs for 1, 2, and 3-bedroom units.

**Table 17 Reading Units listed for rent on Trulia.com, 8/31/2022**

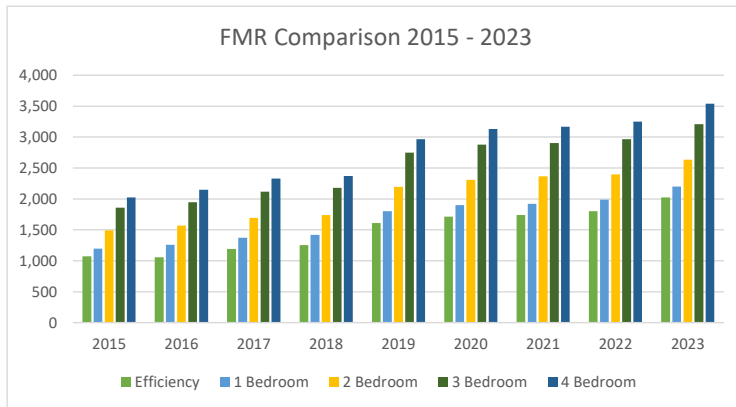
Bedroom size	Median Rent
1-bedroom units (1 listings)	\$2,667
2-bedroom units (7 listings)	\$3,300
3-bedroom units (6 listings)	\$4,000

*Source: Trulia.com, August 31, 2022*

Reading households would have to earn over \$78,000 to afford the 2022 FMR rent in Reading according to HUD. However, using the current rental listings from Trulia.com, a household would have to earn at least \$105,000 to afford a one-bedroom at the median price. Therefore, a 3-person low-income household earning \$100,700 would not even be able to afford a one-bedroom rental at the median price without cost burden based on the recent listings.

Another measure of housing affordability is whether local rent exceeds HUD-determined Fair Market Rents (FMR) that were established as guidelines for Section 8 voucher holders. HUD does not permit voucher holders to rent apartment units above the FMR because HUD has determined the FMR to be a fair and reasonable price for the geographic area. In Figure 7 below, the upward trend reflects the annual adjustment factor intended to account for rental housing market demands. Given the constraints on the Greater Boston rental housing market, rising FMR's are unsurprising and point to the need for more rental housing at multiple price points. Although HUD determines a certain level of rent in an area to be fair, FMR's do not take into account household income, so even an apartment at the FMR is not necessarily affordable to people at all levels of income.

**Figure 7: Fair Market Rent Comparison 2015-2023**



## 6. M.G.L. Chapter 40B Subsidized Housing Inventory

Under M.G.L. Chapter 40B, affordable housing units are defined as housing that is developed or operated by a public or private entity and reserved by deed restriction for income-eligible households earning at or below 80% of the AMI. In addition, all marketing and placement efforts follow Affirmative Fair Housing Marketing guidelines per the Massachusetts Department of Housing and Community Development (DHCD). Housing that meets these requirements, if approved by DHCD, is added to the subsidized housing inventory (SHI). Chapter 40B allows developers of low- and moderate-income housing to obtain a comprehensive permit to override local zoning and other restrictions if a community has less than 10% of its housing stock included on the SHI.

A municipality's SHI fluctuates with new development of both affordable and market-rate housing. The percentage is determined by dividing the number of affordable units by the total number of year-round housing units according to the most recent decennial Census. As the denominator increases, or if affordable units are lost, more affordable units must be produced to reach, maintain, or exceed the 10% threshold.

Within the past 5 years, Reading has continued to make progress with increasing the number of affordable units within the Town. According to the state's Subsidized Housing Inventory (SHI), approximately 10.5% of year-round housing units in Reading are included on the SHI as of December 2020.

Table 18 illustrates the status of subsidized housing in Reading from December 2017 to December 2021.

**Table 18: Reading SHI Units**

Time Period	Total SHI Units	Difference in Units from Previous Period	Percent Affordable
December 2017	896	212	9.35%
December 2020	1,011	115	10.16%

**Commented [MA15]:** We can change this to units added since 2017-18 only.

**Commented [NL16R15]:** It may be required to be set up this way by DHCD, I will explore.

The XXX increase in units is comprised of:

- Reading Housing Authority Units -13 units (affordability period expired)

Table 19 compares the number of SHI units with neighboring communities that abut Reading.

As identified in the table, Reading has a percentage of affordable housing units that is higher than all but one neighboring community.

**Table 19: Total Subsidized Housing Units for Reading and Neighboring Communities**

Community	Year Around Housing Units 2020	Total Subsidized Housing Units			Percent SHI Units	
		Dec 2017	Dec 2020	Percent Change	Dec 2017	Dec 2020
Reading	9,952	896	1,004	12%	7.74%	10.5%
North Reading	5,875	540	538	-.37%	1.72%	9.2%
Saugus	11,303	732	756	3.28%	6.47%	6.7%
Wilmington	8,320	799	766	-4.13%	8.61%	9.2%
Woburn	17,540	1419	1,706	20.23%	9.72%	9.7%
Stoneham	10,159	495	498	.61%	5.35%	4.9%
Wakefield	11,305	758	703	-7.3%	7.35%	6.2%
Lynnfield	4,773	495	494	-2.0%	1.84%	10.3%

Source: 2020 Census, and Department of Housing and Community Development, Chapter 40B Subsidized Housing Inventory (SHI)

**5. Existing Subsidized Housing Stock**

Table 20 below identifies the existing subsidized housing units currently included on the SHI list (through December 2020). This information is regularly gathered and reported by the Department of Housing and Community Development (DHCD). The properties are listed by property type (not chronological).

**Table 20: Reading Subsidized Housing Inventory Properties**

Development Name	SHI Units	Property Type	Subsidizing Agency	Zoning Permit	Affrd End
RHA: Senior housing	80	Age Restricted Rental	DHCD/PHA	Local	Perp
RHA: Family Scattered Site	12	Family Rental	DHCD/PHA	Local	Perp
RHA: Scattered Site	6	Family Rental	DHCD/PHA	40B	Perp
RHA: Pleasant Street	2	Family Rental	FHLBB	Local	2020
RHA: Wilson Street	2	Family Rental	FHLBB	Local	2021
EMARC Reading	12	Supportive Housing	HUD	Local	2036
Reading Community Residence	3	Supportive Housing	HUD	Local	2037
Hopkins Street Residence	4	Supportive Housing	HUD	Local	2042
DDS / DMH Group Homes	52	Supportive Housing	DDS	Local	NA
Cedar Glen	114	Age Restricted Rental	MassHousing	40B	Perp
Peter Sanborn Place	74	Age Restricted Rental	MassHousing	40B	Perp
Residences at Pearl	86	Assisted Living	MassHousing	Local	2046
Reading Commons (Archstone)	204	Family Rental	FHLBB	40B	Perp
Oaktree	11	Family Rental	DHCD/40R	40R	Perp
Reading Village	68	Family Rental	MassHousing	40B	Perp
Schoolhouse Commons	20	Family Rental	MHP	40B	Perp
20-24 Gould Street	55	Family Rental	DHCD/40R	40R	Perp
Sumner/Cheney	1	Ownership	FHLBB	40B	Perp
George Street	3	Ownership	MassHousing	40B	Perp
Maplewood Village	9	Ownership	DHCD/LIP	40B	2054
Governor's Drive	2	Ownership	DHCD/LIP	40B	2103
Johnson Woods	11	Ownership	DHCD/LIP	Local	Perp
Johnson Woods Phase II	25	Ownership	DHCD/LIP	Local	Perp
Reading Woods	43	Ownership	DHCD/40R	40R	Perp
Postmark Square	50	Ownership	DHCD/40R	40R	Perp
Ace Flats	55	Rental			
Rise 475	31				
<b>TOTALS</b>	<b>1028</b>				
Census 2020 Units	<b>10.32%</b>				

Subsidizing Agency:

MHP – Massachusetts Housing Partnership

DHCD/PHA: Department of Housing and Community Development, Public Housing Authority

DHCD/LIP: Department of Housing and Community Development, Local Initiative Program

Key to

**Commented [NL17]:** Added the units from the updated chart, we are now over the 1004.

**Commented [NL18R17]:** This does not include units currently under construction.

DHCD/40R: Department of Housing and Community Development, 40R  
DDS: Department of Developmental Services  
FHLBB: Federal Home Loan Bank of Boston  
HUD: Federal Housing and Urban Development Public Housing Authority

## **B. Affordable Housing Efforts**

Reading has pursued a proactive planning-based strategy in an effort to increase the supply of affordable housing and meet the 10% minimum statutory requirement. The Town has made strides towards meeting that goal through adopting zoning changes and utilizing current planning best practices. The Town's 2018 HPP created a roadmap to follow as the Town worked towards meeting its affordable housing goals.

**Safe Harbor** — As reported earlier, in 2020 the Town achieved a 10% stock on the Subsidized Housing Inventory (SHI), the inventory used by the Commonwealth of Massachusetts to monitor the affordable housing statutory requirements. As a result, the Town secured a safe harbor designation. The Town should continue to monitor units that may fall off of the SHI due to permitting timelines and if applicable re-seek Safe Harbor designation as needed.

## 1. Adoption of Smart Growth Districts (40R)

### Gateway Smart Growth District (GSGD)

In December 2007, Reading adopted the Gateway Smart Growth District under MGL Chapter 40R and 760 CMR 59.05(4). The overlay district is located at the southern town line, near Interstate 95/Route 128 and Route 28 (Reading's Main Street). The 424 unit Reading Woods project is currently completed and fully occupied. The GSGD zone includes 200 of the 424 units. Of those 200 units, 43 are affordable and are included on the SHI. This site was formerly a commercial use owned by the Addison Wesley Corporation.



### Downtown Smart Growth District (DSGD)

In November 2009, Reading adopted the Downtown Smart Growth District (DSGD) under MGL Chapter 40R and 760 CMR 59.05(4). This zoning change was also a response to the 2007 Housing Plan which identified downtown as an area for future housing opportunities. At that time, the DSGD overlay district did not encompass the downtown in its entirety and allowed for 203



additional housing units by right. The first project that was permitted and constructed within the DSGD was the Oaktree Development located at the former Atlantic Market site on Haven Street. This project is a mixed-use development with retail uses on the ground floor and 53 residential units above. At 53 units, this project exceeded the maximum density allowed, but was granted a waiver from the CPDC for a density of 73 units per acre. A total of 11 units are affordable and are listed on the SHI.

**Commented [NL19]:** Have any units been developed in this district since the inception of this district?

In September 2017, Postmark Square, an adaptive re-use of the historic Reading Post Office, received 40R Plan Review approval from the Reading Community Planning and Development Commission (CPDC). Postmark Square is a mixed-use project with 50 ownership residential units, 10 of which are affordable units.



**Commented [NL20]:** Update to when it was completed.

**Expanded Downtown Smart Growth District (DSGD)**

In April of 2017, Town Meeting adopted and the AG’s office approved, an expansion of the DSGD to include approximately 21 additional acres, with a potential for 113 new by-right residential units. At this time Town Meeting also adopted, and the AG’s office approved, increasing the affordable housing requirement from 20% to 25% for rental projects within the DSGD. Pursuant to MGL Chapter 40B, the increase to 25% allows the Town to count all of the units in a rental project versus only the actual number of affordable units.

In November 2017, 20-24 Gould Street, a redevelopment of the former EMARC site received 40R Plan Review approval from the Reading Community Planning and Development Commission (CPDC). The mixed-use project includes 55 residential units, 14 of which are deed restricted affordable. As a rental project for which at least 25% of the units are affordable, all 55 units qualified for listing on the SHI.



Another mixed-use 40R redevelopment project was approved for the redevelopment of the former Sunoco station property along Main Street. This 31-unit rental project is currently fully occupied and as a rental project for which at least 25% of the units are affordable, the total number of units in the project will qualified for listing on the SHI.

In 2022 the CPDC approved a mixed-use, 29-rental unit development at the property 6-16 Chute Street. The development will include 8 deed restricted affordable units, though all 29 units will qualify for the SHI.

A number of additional 40R development projects have been approved, though they did not trigger the affordability threshold of 13 units or more. This includes the 3-unit townhouse development along Chapin Avenue; the 7-unit re-development of the Reading Chronicle building at 531 Main Street; and the 6-unit development at 18 Woburn Street.



**Environmental Justice District:**

Reading has adopted an Environmental Justice District created by Federal Executive Order 12898. DEP (Department of Environmental Protection) defines an EJ Area as any census tract where 20 percent or more individuals live at or below the federal poverty line, and/or 30 percent or more of the population identifies as a non-white minority, based on data from the U.S. Census Bureau and the federal guidelines for poverty. An environmental justice district is defined by the Environmental Protection Agency as: the fair treatment and meaningful involvement of all people regardless of race, color, national origin, or income, with respect to the development, implementation, and enforcement of environmental laws, regulations, and policies. This goal will be achieved when everyone enjoys:

- The same degree of protection from environmental and health hazards, and
- Equal access to the decision-making process to have a healthy environment in which to live, learn, and work.

Fair treatment means no group of people should bear a disproportionate share of the negative environmental consequences resulting from industrial, governmental, and commercial operations or policies.

Meaningful involvement:

- People have an opportunity to participate in decisions about activities that may affect their environment and/or health;
- The public's contribution can influence the regulatory agency's decision;
- Community concerns will be considered in the decision making process; and
- Decision makers will seek out and facilitate the involvement of those potentially affected.

The approach is both collaborative and strategic – working with partners to create holistic solutions that make a difference in communities through better policies, tools, and application of resources. Areas of focus include:

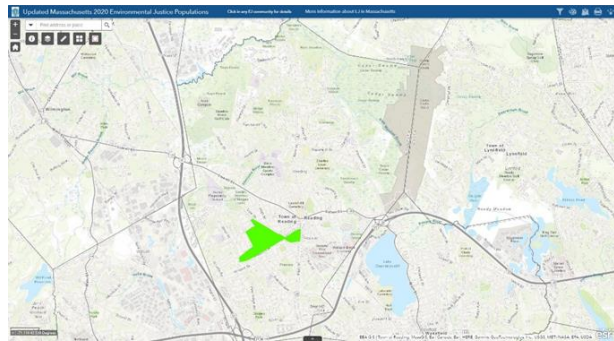
- Strengthening and expanding governmental partnerships, particularly focused on the proactive efforts of state, tribal, and local governments to advance environmental justice.
- Implementation and use of the tools and guidance created previously in a way that is measurable and significant.
- Demonstrate measurable progress on significant issues, including reducing disparities in childhood blood lead levels and working to ensure that all people served by small community and tribal water systems have drinking water that meets applicable health-based standards.

The highlighted area on the Environment Justice Area Map shows the area within Town that falls under this protection. The goal of the EJA program is for EPA to advance environmental justice through its programs, policies and activities, and support cross-agency strategy on making a visible difference in environmentally overburdened, underserved, and economically distressed communities. The Office of Environmental Justice’s

**Commented [NL21]:** Added Environmental Justice information.

**Commented [NL22R21]:** Do you know what neighborhood or precinct the EJA is in?

mission is to facilitate Agency efforts to protect environment and public health in minority, low-income, tribal and other vulnerable communities by integrating environmental justice in all programs, policies and activities.



Environmental Justice Area Map

### ***Planning Efforts***

**2016-2022 Economic Development Action Plan (EDAP)** - The EDAP recommendations include expanding housing and mixed use in identified Priority Development Area's across the Town. A key recommendation was to expand the DSGD and allow mixed-use development in areas around Town. A future plan update is under consideration. The 2015-2022 EDAP link can be found on the Town's Economic Development webpage at [readingma.gov](http://readingma.gov).

**Metro North Regional Housing Office (MNRHSO)** – In 2015, Reading established the MNRHSO comprised of the towns of Reading, North Reading, Wilmington, and Saugus. The City of Woburn joined the regional group in 2019. The MNRHSO now shares the expenses of a full-time housing consultant agency (Anser Adviosry, 2022) who monitors existing affordable housing stock across the municipalities and provides expertise related to affordable housing development and needs. Massachusetts has only a handful of RHSO's and Reading is proud to have developed this for the Metro North region.

**Comprehensive Update/Accessory Apartments Update to the Reading Zoning Bylaw (ZBL)** – In 2014, the ZBL was updated to clarify, simplify, and modernize zoning for ease of use by developers. Some development of Accessory Apartments we made "by-right" if performance standards are met and if the unit is located in an existing single-family structure. A special permit is required for accessory apartments in detached structures or involving increases in gross floor area through new construction. Permitting checklists

have been developed to further simplify the zoning.

**Mixed-use Bylaw addition to Reading ZBL** – In 2019 the Town proposed and adopted a Mixed-Use Bylaw for its Business-A Zoning District. The Mixed-Use Bylaw allows mixed-use development through a Special Permit granted by the CPDC and requires certain amounts of commercial floor area. Affordable dwellings units are required for projects 10-units and more at 10% of the total units and required for at least 80% AMI.

**40R Zoning Amendments to Reading ZBL** – In 2021-22 Town Meeting requested by Instructional Motion that the CPDC and Town Staff review the existing DSGD 40R Bylaw for improvement. Reading contracted with the Metro Area Planning Council (MAPC) to help lead public engagement around 40R and to learn what was working and what was not. Found desired improvements included requiring open space, additional design criteria, reduced density, setbacks and parking solutions. The CPDC proposed a series of holistic changes to address the needs and developed a ‘tiered schedule for density waiver requests’ – requiring certain improvements and amenities for higher density projects. The Bylaw amendments were approved at April 2022 Town Meeting.

## 2. Challenges and Constraints to the Development of Affordable Housing

### a. Existing Housing Allowances

The Reading Zoning Map illustrates residential uses taken from the Reading Zoning Bylaw effective as of November 2021. The tables below identify which types of residential and business uses are allowed in each zoning district. “YES” indicates uses allowed by right. “SPP” means the use requires a Special Permit from the Community Planning and Development Commission and “SPA” means the use requires a Special permit from the Zoning Board of Appeals. “No” denotes a use that is not allowed.

**Table 21: Uses for Residential Districts**

Principal Uses	RES S-15 S-20 S-40	RES A-40	RES A-80	PRD-G PRD- M	PUD-R
<b>Residential Uses</b>					
Single Family Dwelling	Yes	Yes	No	SPP	SPP
Two Family Dwelling	No (1)	Yes	No	SPP	SPP
Multi-Family Dwelling	No	Yes	Yes	SPP	SPP
Age Restricted Multi-Family Dwelling	No	SPP	SPP	SPP	SPP
Boarding House	No	Yes	No	No	No

**Table 22: Uses for Business and Industrial Districts**

Principal Uses	Bus A	Bus B	Bus C	IND	PUD-B Overlay	PUD-I Overlay
<b>Residential Uses</b>						
Single Family Dwelling	Yes	No	No	No	No	No
Two Family Dwelling	Yes	No	No	No	No	No
Multi-Family Dwelling	Yes	No	Yes (1)	No	No	No
Age Restricted Multi-Family Dwelling	No	No	Yes	No	No	No
Boarding House	No	No	No	No	No	No
<b>Other Uses</b>						
Mixed-Use	SPP	No	SPP	No	No	No

Source: Town of Reading Zoning By-Law, Tables 5.3.1 and 5.3.2, Table of Uses, September, 2017

Although Reading is primarily zoned for single family homes, other zoning districts including A-40, A-80 and Business A allow for other forms of residential development such as apartments or multi-unit homes. Additional zoning overlay districts such as PUD, PRD, and Smart-growth 40R also allowed for multi-family and/or mixed-use development. Table 23 below identifies the base and overlay zoning districts in Reading.

**Table 23: Reading Base Zoning Districts**

Zoning District	Short Name	Area (sq miles)	Acreage	Percent
Single Family 15 District	S-15	3.3	2,120.1	33.2%
Single Family 20 District	S-20	4.1	2,643.2	41.3%
Single Family 40 District	S-40	1.9	1,235.1	19.3%
Apartment 40 District	A-40	0.0	30.8	0.5%
Apartment 80 District	A-80	0.0	12.8	0.2%
Business A	BUS A	0.1	48.4	0.8%
Business B	BUS B	0.1	55.2	0.9%
Business C	BUS C	0.1	38.8	0.6%
Industrial	Ind	0.3	209.1	3.3%
	Totals	10.0	6393.4	100.0%

Source: Town of Reading Zoning By-Law, April 2017

In addition to the base zoning districts, Reading has several overlay districts. Table 24 on the following page is a comprehensive list of all the zoning districts, including overlays within the Town of Reading.

**Table 24: Town of Reading Zoning and Overlay Districts**

Type	Full Name	Short Name
Residence	Single Family 15 District	S-15
Residence	Single Family 20 District	S-20
Residence	Single Family 40 District	S-40
Residence	Apartment 40 District	A-40
Residence	Apartment 80 District	A-80
Business	Business A District	Bus. A
Business	Business B District	Bus. B
Business	Business C District	Bus. C
Industrial	Industrial	Ind.
Overlay	Aquifer Protection District	AQ
Overlay	Municipal Building Reuse	MR
Overlay	Planned Residential Development General	PRD-G
Overlay	Planned Residential Development Municipal	PRD-M
Overlay	Planned Unit Development Business	PUD-B
Overlay	Planned Unit Development Industrial	PUD-I
Overlay	Planned Unit Development Residential	PUD-R
Overlay	Gateway Smart Growth District	GSGD
Overlay	Downtown Smart Growth District	DSGD
Overlay	Planned Unit Development - Residential Corona	PUD-R-C
Overlay	National Flood Insurance Flood Management Dist.	NF
Overlay	Flood Plain District	F

Source: Town of Reading Zoning By-Law, April 2022

**b. Development Capacity and Constraints:**

Residential development is constrained by many factors including availability of land, land use regulations, natural resources such as wetlands and threatened and endangered species, and limitations on infrastructure capacity. In order to evaluate the potential development capacity, the availability of land must be evaluated against potential development constraints.

**Available Land:** The Town of Reading is approximately 10 square miles in size and contains 6,388 acres of land. Using a GIS analysis it was estimated that 1,756 acres (27.5%) of land in Reading is undeveloped or Chapter 61 Land. Of that, 372 acres are potentially developable, and only 139 acres of developable land remain after regulatory constraints<sup>7</sup> are applied. This results in approximately 262 buildable lots based on the minimum lot size of 15,000 square feet required in the S-15 residential zoning district. However, this build-out is for

undeveloped land and does not take into account previously developed land that could be subdivided to yield more homes. Using the same GIS analysis and regulatory constraints, it is estimated that a potential of 513 new homes could be built on currently developed land.

However, the actual number is likely to be significantly less when taking into account infrastructure costs, lot shape, or other geological conditions, as well as particular zoning district (specifically S-20 or S-40).

As identified above, Reading has several overlay districts. Overlay districts are zoning districts which may be placed over the underlying districts. The provisions for the overlay district may be more stringent or flexible based on the purpose of the particular overlay. The following are overlay districts that relate to housing development and the provision of affordable housing in Reading. Some of the overlays allow for other forms of development, increased density in development, and may have requirements for affordable housing.

***Planned Unit Development – Residential***

Denoted as PUD-R this overlay district allows, by a Special Permit from the CPDC, single family, two family, apartments, elderly housing, among other uses. At least ten percent of all residential units in the PUD-R must be affordable. The affordable percentage requirement increases to 15% for property within 300-feet of a municipal boundary. It should also be noted that the Planned Unit Development – Industrial (PUD-I) overlay district also allows residential development when the proposed development is within 200-feet of another residential district.

***Planned Residential Development (PRD)***

A PRD district is an overlay zoning district which may be applied to parcels within the S-15, S-20, S-40 and A-80 residential zoning districts and must be approved through Town Meeting. Upon approval of the overlay, the CPDC may issue a Special Permit for residential development. In Reading, there are two types of PRD districts; General (PRD-G) and Municipal (PRD-M). The PRD-G requires a minimum lot size of 60,000 square feet and encourages affordable unit development. PRD-M development is allowed on current or former municipally-owned land of at least eight acres and requires a certain percentage of affordable units.

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<sup>7</sup> Only residentially-zoned parcels were included in the analysis. Constraints include FEMA 100 year flood zones, 100' buffers around wetlands, streams, and vernal pools, and 200' buffers around perennial streams. Aquifer protection district and slope were not included as constraints. Infrastructure needs were not considered in calculating potential lots.

**Municipal Building Reuse District**

The Municipal Building Reuse District is an overlay district that allows for the redevelopment or reuse of surplus municipal buildings. At least ten percent of the residential units must be affordable.

**Smart Growth Districts (40R)**

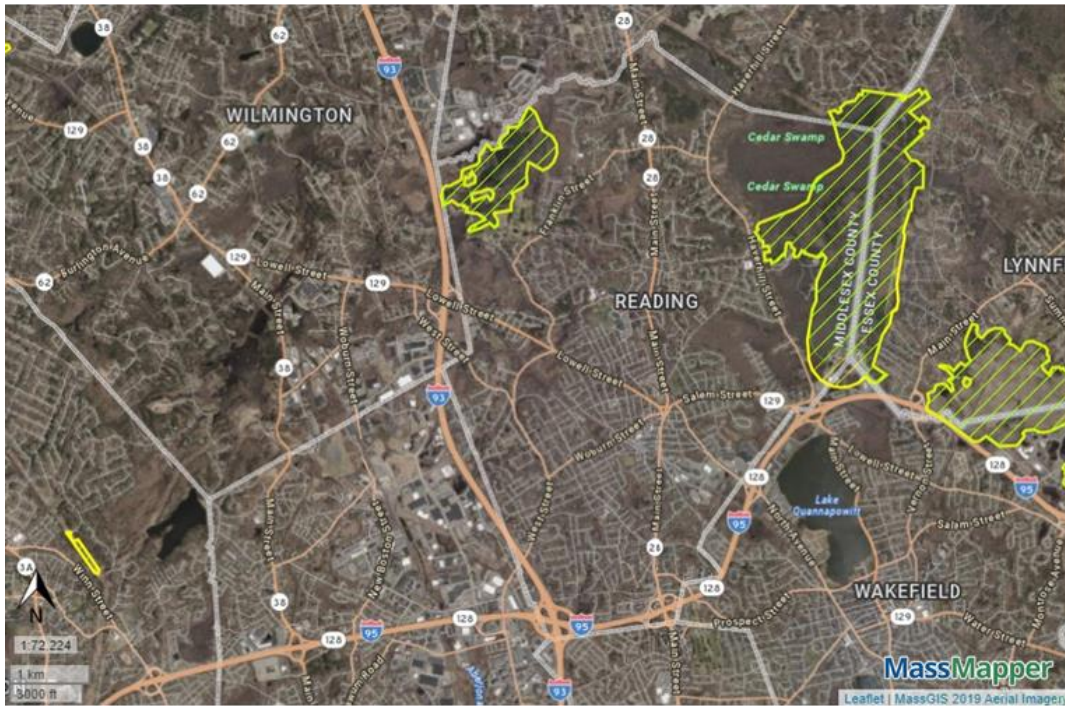
Reading has adopted two Smart Growth 40R Districts. The Downtown Smart Growth (DSGD) District is an overlay district that allows for mixed-use or multi-family residential within the downtown area via plan approval by the Community Planning and Development Commission. This overlay district requires a minimum of 20% affordable units (homeownership projects) and a minimum of 25% affordable units if the development is rental or limited to occupancy by elderly residents. As described above the DSGD has seen a number of success in revitalizing the downtown area with both new commercial space and residential growth.

The Gateway Smart Growth District (GSGD) is also an overlay district located at the intersection of Route 28 (Main Street) and Interstate 128/95. This district is fully developed with one 424-unit project (200 of the units are technically within the GSGD) and includes 43 affordable units (10%).

**Natural Resource Limitations:** Wetlands and other natural resources such as endangered species habitats can place constraints on development. As mentioned above, many lots are considered unbuildable due to the presence of some of these resources. Almost one-fourth of the land in Reading is considered wetland or within the jurisdictional buffer zones of resource areas. Another 6% of land is within the 100-year flood zone. Reading is located within the Aberjona, Ipswich and Saugus river watersheds and many of Reading’s wetland areas are located in associated floodplains.

**Rare and Endangered Species:** There are three areas in Reading which contain rare or endangered species. These areas are protected under the Massachusetts Endangered Species Act and the Massachusetts Wetlands Protection Act. Any development within these areas is subject to review by the Massachusetts Natural Heritage and Endangered Species Program (NHESP). The three areas of designation include a large tract of land within the western side of the Town Forest and two separate tracts of land within the Cedar Swamp near the Burbank Ice Arena located on the eastern side of the town.

Commented [NL23]: Added Rare and endangered species map



NHESP Estimated Habitats of Rare Wildlife



NHESP Priority Habitats of Rare Species



Map Features for Imagery



**c. Infrastructure**

**Commented [MA24]:** Confirming this language with Engineering Dpt.

**Public Water** The Town of Reading’s water distribution system is comprised of 110 miles of distribution main, 2 water booster stations and 2 storage facilities; one 0.75 M gallon elevated tank located at Auburn Street and one 1.0 M gallon standpipe located at Bear Hill. Since 2006 Reading purchases all of its drinking water from the Massachusetts Water Resource Authority (MWRA) which is supplied into the Town’s distribution system via a 20” water main located on Border Road. Construction of a second 36” redundant supply pipe line was completed by the MWRA which provides a second supply source to the Town’s distribution system at Leech Park on Hopkins Street. The Town also has 5 emergency water connections with 3 of the bordering communities.

Prior to purchasing water from the MWRA, Reading operated a water treatment plant adjacent to the Town Forest which drew water from nine wells within the Town Forest and Revay Swamp, all contained within the Ipswich River Watershed. Following the temporary closure of wells as a precautionary measure to avoid contamination from an overturned petroleum vehicle on Rte. 93 and to aid in relieving stress to the Ipswich River aquifer, the Town decommissioned the treatment plant in 2006 and began purchasing 100% of the Town’s drinking water from the MWRA. Reading continues to maintain the wells as a backup water supply until the redundant MWRA water supply source is on-line.

Reading has established a strong water conservation program offering residents rebates for the installation of low flow fixtures and appliances, irrigation sensors and rain barrels. The program has been extremely successful and has lowered water consumption by 10% over a 10-year period. In 2016 the average daily water consumption equaled 1.7 MGD with a maximum daily demand of 2.2MGD.

All water purchased from the MWRA is metered at the supply mains through meters owned by the MWRA and the Town of Reading. Residential and Commercial meter reading is modern and efficient, with an automatic system that uses radio transmitters for optimal accuracy and efficiency. Water rate changes are established by the Board of Selectmen based on recommendations from staff.

Reading’s water distribution system is maintained on a GIS mapping and database system. The operation of the water system is overseen by the Department of Public Works, and is on an enterprise basis, through which the full costs of operations are borne by the water users, and not paid for by local property taxes. Water supply is considered adequate for any new development, and it no longer impacts the Ipswich River resource.

**Public Sewer:** The sewer system is owned and operated by the Town and serves approximately 98% of all properties within the Town. While 149 individual properties throughout the Town are not yet connected to available public sewer, the only major unsewered areas are portions of Main Street north of Mill Street, and the westerly portion of Longwood Road. The system consists of 107 miles of sewer main, 12 wastewater pump or lift stations, and approximately 7,800 local service connections.

All sewage from the Town's system discharges into the MWRA's regional collection system through 2 major outfalls; one along Rte. 93 in the west adjacent to Arnold Avenue, and one at the end of Summer Avenue in the south. An isolated collection system servicing Border Road and a small portion of the West Street area discharges into the regional sewerage system via the City of Woburn. The regional sewerage system is operated by the MWRA, with principal treatment at Deer Island facility.

Water usage meters measure outfall flows and discharges. Sewer rate changes are established by the Board of Selectmen based on recommendations from staff. The Town's connection policy requires all new development to tie into the public sewer system and requires conversion to public sewer when residential septic systems fail. In addition, the Town sewer connection policy requires that all new developments perform system Inflow/Infiltration improvements or that equivalent contributions of twice the new flow multiplied by \$4.00 are made to the Town.

Reading's sewer system is maintained on a GIS mapping and database system. The operation of the sewer system is overseen by the Department of Public Works, and is on an enterprise basis, through which the full costs of operations are borne by the sewer users, and not paid for by local property taxes.

**Stormwater System:** Reading is located in the upper reaches of three (3) separate drainage basins; the Ipswich River basin to the north, Saugus River basin to the southeast, and Aberjona River basin to the southwest. All stormwater is collected through a series of approximately 3,400 catch basins, 80 miles of piped system, numerous open water bodies and 450 outfalls. The GIS mapping of the stormwater system was updated in 2016.

The town has evaluated problematic areas of the Aberjona and Saugus River basins and has developed a capital plan for the improvements. The system is operated and maintained by the Department of Public Works and is funded partially through local property taxes and the balance through enterprise funds. Following the authorization of the MS4 permit program by the EPA in 2003, the Town established a stormwater enterprise in 2006 to fund the additional operation and maintenance of the stormwater system mandated by the MS4 permit. The enterprise funding is apportioned based on the

extent of impervious area within the parcel.

Through the policies established under the Town's MS4 permit program, all new developments are required to install and maintain stormwater management systems. Each system must include a long-term operation and maintenance plan which includes annual reporting to the Town.

**Roadway Network** Reading contains approximately 102 miles of streets and roads, however, the Town only maintains approximately 92.7 miles. The remainder of roadways not maintained by the Town are state-owned or privately-owned roadways. The Town is bordered by Interstate Highway 95 (also known as state Route 128) on the south and southeast, and Interstate Highway 93 on the west.

Reading's roadway system consists of several arterial, collector and local roadways. Arterial streets, carrying large traffic volumes and serving as principal local routes as well as regional routes, include: Main Street (Route 28), and Salem Street and Lowell Street (Route 129). These three main arterials intersect at the Common in the middle of Town, and are lined almost uninterruptedly with commercial and densely developed residential uses.

Minor arterial streets include: Haverhill Street (residential), Walkers Brook Drive (commercial and industrial), Washington Street (residential), Woburn Street (commercial through Downtown and otherwise residential) and West Street (almost entirely residential).

Collector streets, serving traffic from neighborhood streets and feeding into the arterial streets in Town, include: Franklin Street, Grove Street, Forest Street, Charles Street, Washington Street, High Street, Summer Avenue, South Street, Hopkins Street, and Willow Street.

Since 2000, Reading has utilized a computerized pavement management system to assist in developing a roadway capital improvement plan. In 2011 the system was converted to a GIS based management system. The system enables the Town to reliably develop cost effective roadway maintenance plans. Based on roadway inspections, each roadway is given a pavement condition index (PCI) that is used to identify the overall condition of the roadways. PCI values range from 0 to 100 and the 2016 average PCI of all roadways was 77. Every 3-4 years, each roadway is physically inspected to update the database for pavement distresses factors, which are used to determine pavement longevity in the program. Through the use of the computerized program, state Chapter 90 roadway funds and the general operating funds (which is a result of a proposition 2 ½ override), the Town's planned annual expenditure of roadway maintenance will insure an overall increase in the roadways PCI value for the next 10 to 15 years.

**Commuter Rail:** Reading is served by the Massachusetts Bay Transportation Authority (MBTA) Commuter Rail system. The current MBTA schedule has 19 commuter rail trains each weekday inbound to North Station in downtown Boston. A total of 23 commuter trains travel outbound to Reading each weekday from North Station and of those 13 continue on to the final destination of Haverhill. The Reading train station is located in the heart of downtown at the “Depot”. There is a mix of MBTA/Town parking available at the Depot. The 113 MBTA-owned spaces are available for a rate of \$6.00/weekday, \$2.00/weekend day or \$105 for a monthly pass. There are also several Town-owned parking spaces limited to resident permit only from 6:00AM-9:30AM, for an annual fee of \$150. The town-owned spaces are unregulated after 9:30AM and open to any user.

The most current ridership data available is contained in the MBTA “Blue Book” dated July, 2014. The 2014 Blue Book statistics show a typical weekday station boarding (inbound) at Reading station as of April, 2013 was 799 commuters. The average boarding count for the period 2007 – 2013 for Reading Station (inbound) was 834 with a high of 1010 in 2011 and a low of 444 in 2012. The 2009 ridership in Reading was higher than any other station on the Haverhill/Reading MBTA line. Lawrence had the second highest ridership at 722.

**Bus Service:** The MBTA operates one bus route from Reading to the Malden Center Orange Line subway station through Bus 137. Bus 137 travels from the Reading Depot, continues along Woburn Street and Salem Street where it then travels south through Wakefield and continues south through Melrose on Main Street and terminates at the Malden Center subway station. The entire route from Reading to Malden takes approximately 40-45 minutes.

**Electrical – Reading Municipal Light Department (RMLD):** In 1891, the Massachusetts Legislature passed a law enabling cities and towns to operate their own gas and electric plants. Following several years of study and Special Town Meetings, Reading began producing electricity for 47 streetlights and 1,000 incandescent lamps on September 26, 1895. Special legislation was enacted on April 8, 1908 authorizing the Town of Reading to sell and distribute electricity to Lynnfield, North Reading and Wilmington. As a result, RMLD began delivering power to Lynnfield Center on December 10, 1909; to North Reading in 1910 and to Wilmington in 1912.

There have been decades of advancement and achievement since those early days of electricity, but some things have remained constant. After more than 125 years, RMLD is still committed to reliable service at competitive rates, but maintaining that commitment requires astute planning, innovative ideas and close attention to detail.

The GAW substation on Causeway Road in Reading was constructed in 1969-1970 allowing RMLD to connect to the grid and purchase power from almost anywhere on the northeast power pool. In June 2000, construction was completed on a distribution substation connected to 115,000-volt transmission lines in North Reading in order to accommodate growth and enhance the entire system's efficiency and reliability. To ensure reliability, RMLD has an ongoing preventative maintenance program aimed at solving problems before they occur.

Today, RMLD serves more than 70,000 customers in its four-town service area. A professional staff of 75+ employees bring a broad scope of utility experience to RMLD's daily operation, including an up-to-date understanding of the evolving energy market. With its peak demand for electricity at more than 156 megawatts, RMLD purchases electricity from a number of different sources through long-and-short-term contracts. Recent technological advances at RMLD include a fiber optic cable network that links all substations for state-of-the-art system monitoring and control. Computer systems are also state-of-the-art, and now include a sophisticated website. Meter reading is modern and efficient, with an automatic system that uses radio transmitters for optimal accuracy and efficiency.

RMLD supports in-lieu-of-tax payments, community development and energy education programs. This includes energy efficiency programs, energy conservation programs, school safety projects, school-to-work partnerships, outreach to senior groups, community support, and active memberships in local civic groups.

**Infrastructure Capacity for Planned Production:** Reading's overall infrastructure contains adequate capacity and capital facilities for existing build out and anticipated future development. The Town also periodically reviews and assesses its 10-year Capital Plan to ensure that infrastructure will be maintained and sustained for projected growth. The Town expects to continue the policy and practice of requiring mitigation from developers, financial or otherwise, for the impacts of their proposed projects, including infrastructure improvements. Therefore, as needs are identified through staff level and consultant review of individual permitting applications, the Town expects to require - as conditions for approval - adequate improvements and upgrades to systems, resources and capacity to allow for development under this Housing Production Plan, while protecting and enhancing natural, cultural and historical assets consistent with the 2005 Master Plan.

## Section 2: Affordable Housing Goals and Strategies

The housing goals and strategies included in this section are aimed primarily at creating more housing choice and affordable housing in Reading. The goals and their related strategies also support the Town's ability to achieve other interrelated community goals, including goals for economic development as well as protecting quality of life and community character.

### ***Housing Goals and Strategies***

In reviewing the previous Reading Housing Plan of 2018, other Reading related documents, analyzing the current housing situation in Reading, and in discussing housing issues with town citizens and officials, the Town has identified three priority areas to establish overarching goals that are the most appropriate and most realistic for the community. Each of the three priority areas includes a series of strategies to help achieve the vision. The goals and strategies are listed immediately below and discussed in more detail on the following pages.

### **1. Development and Regulatory**

#### **Goals**

- a) Increase, diversify and promote a mix of housing options in Reading for low- to middle-income households.
- b) Create and maintain housing that is available and accessible to aging and disabled populations. Support housing development needs for most vulnerable residents.
- c) Proactively plan for and manage the integration of housing growth to mitigate impacts and enhance the existing residential character of the Town.
- d) Provide equitable access to housing opportunities, public spaces, green spaces and healthy/safe environments.
- e) Maintain Reading's Safe Harbor designation by retaining pace of Affordable Housing development in order to remain above 10% on Subsidized Housing Inventory.

#### **Strategies**

- 1) Adopt/Amend zoning that would comply with MBTA Communities legislation
- 2) Identify Zoning Districts/Geographies in which current regulations can be modified to allow the development of SHI eligible housing units (including previously identified Priority Development Areas)
- 3) Strengthen and expand Inclusionary Zoning to further promote/develop affordable housing opportunities
- 4) Amend Zoning Bylaw to define and expressly permit Congregate

Housing. Identify sites with the potential to convert to congregate housing use.

- 5) Allow for redevelopment or conversion of pre-existing non-conforming residential uses by-right and/or make the permitting path for such easier
- 6) Consider zoning amendments to allow Accessory Dwelling Units (ADUs) by-right and/or lessen restrictions on such
- 7) Require installation of Open Space in a flexible manner on new multi-family developments. Require installation or improvements of sidewalks, bike paths, trails/connections, and/or transit-oriented development for multi-family and mixed-use developments
- 8) Ensure future Net Zero and energy efficiency requirements are met in new development that provide cost savings to the end user (residents)
- 9) Preserve existing affordable housing stock to ensure they remain affordable and continue to qualify for SHI
- 10) Maintain Safe Harbor designation by maintaining, tracking and continuing to add affordable developments to SHI

## 2. Funding and Resources

### Goals

- a) Support vulnerable, low- and middle-income populations through programming and services.
- b) Ensure appropriate maintenance and upkeep of existing affordable housing stock. Continue to look for opportunities to increase affordable units within existing properties.
- c) Maintain and see national/state/local designations that provide grant and financial opportunities to develop/maintain/support affordable housing development and residents.
- d) Ensure equitable access to financial/support services and programming.

### Strategies

1)

## 3. Partnerships, Education and Leadership

### Goals

- a) Initiate and strengthen local and regional relationships. Work in cooperation and collaborate with community partners/organizations to promote enhanced understanding of housing needs and support for creation of housing development.
- b) Increase capacity to produce housing through leadership developments, advocacy, staffing, funding, established goals and diverse relationships. Provide education and support to local staff, boards/commissions and public.
- c) Ensure access, support, outreach and inclusion to social and vulnerable populations across the Town and region.

**Commented [MA25]:** We should also include language to partner to raise awareness of programming and services available.

## Strategies

### Housing Strategies

This section includes descriptions of local regulatory strategies, local initiative strategies and an action plan, all of which are intended to assist the Town of Reading in meeting its affordable housing goals above.

#### Reaching and Maintaining 10%

The Housing Production Plan guidelines require that the HPP set an annual goal for housing production, pursuant to which there is an increase in the municipality's number of SHI Eligible Housing units by at least 0.50% of its total units during every calendar year included in the HPP, until the overall percentage exceeds the 10% Statutory Minimum.

There should be a direct link between the setting of these goals and the results of the needs assessment. The numerical goal should be based on the total year-round number of housing units. The total year-round housing units is the total number of units for the community in the latest U.S. Census including any changes due to demolition or new construction.

The Table below projects the Town of Reading SHI. Note that the unit counts for projects on the first three lines are forecast. The denominator of Year-round housing units will be updated by the Census and then reported by DHCD in 2023. These projections are not included in this update, but will be included in the future updates.

	FY18	FY19	FY20	FY21	FY22	FY23
Johnson Woods			7			
Eaton Lakeview 40B				120		
467 Main Street 40R			31			
<b>SHI Units Created</b>	<b>896</b>	<b>0</b>	<b>38</b>	<b>120</b>	<b>0</b>	<b>0</b>
<b>Cumulative SHI Units</b>	<b>896</b>	<b>896</b>	<b>934</b>	<b>1054</b>	<b>1054</b>	<b>1054</b>
<b>Year Round Units (2010 Census)</b>	<b>9584</b>	<b>9584</b>	<b>9952</b>	<b>9952</b>	<b>9952</b>	<b>9952</b>
SHI %	9.35%	9.35%	9.75%	11.00%	11.00%	11.00%
10% Requirement	958.40	958.40	958.40	958.40	958.40	958.40
+/- 10%	-62.4	-62.4	-24.4	95.6	95.6	95.6

#### Development and Regulatory Strategies

Regulatory strategies refer to recommendations that entail amendments to local zoning bylaws or other local development regulations to help encourage development of more housing options including affordable housing.



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<sup>8</sup> More information about MassHousing’s Housing Production Program:  
[www.masshousing.com/portal/server.pt/community/planning\\_programs/207/planning\\_for\\_housing\\_production](https://www.masshousing.com/portal/server.pt/community/planning_programs/207/planning_for_housing_production)

### **Strategy 1: Adopt/Amend Zoning to comply with MBTA Communities legislation**

MBTA Communities legislation is the requirement codified as Section 3A of Massachusetts General Law (MGL) Ch. 40A. The law requires designated MBTA Communities to have at least one zoning district of reasonable size in which multi-family housing is permitted as of right and meets other criteria set forth in the statute, including but not limited to: a minimum gross density of 15 units per acre, locations not more than 0.5miles from a MBTA station, no age restrictions and zoning suitable for families with children.

On August 10, 2022 DHCD issued the final guidelines to determine if an MBTA Community is in compliance with the Section 3A language. In total, 175 MBTA Communities are subject to the new requirements. More information and resources are available at the State [webpage](#).

Locally, Reading is designated as a Commuter Rail Community. Based on its designation (and other local factors) the Town must zone to allow the Unit Capacity of 1,493 multi-family units across a Reasonable District Size of 43 acres of area. It also requires that 40% of the Unit Capacity and District Area be located within 0.5miles of the local Reading Train Depot (598 units and 17.3 acres respectively).

There are potentially many paths to compliance with the legislation, but new zoning adoption or amendment of existing zoning districts will be needed, that much is certain. Reading will have until December 31, 2024, to comply with the requirements or it may face impacts to funding as described in Section 3A.

The Town should engage its leaders and community as a whole to determine a method of compliance that addresses and meets the local need without dramatically changing the existing character of the community. Technical Assistance should be sought and steps to achieve compliance be planned. Compliance would help address shortfalls identified in this HPP update and identified for the region.

**Commented [MA26]:** <https://www.mass.gov/info-details/multi-family-zoning-requirement-for-mbta-communities>

**Strategy 2: Identify Zoning Districts/Geographies in which current regulations can be modified to allow the development of SHI eligible housing units, including previously identified Priority Development Area's (PDA's).**

**Redevelopment in the PDAs could generate ~410 new housing units, capturing 43% of town-wide housing demand.**

As part of the Reading Economic Development Action Plan 2016- 2022 (EDA Plan), the town identified four regionally-significant

Priority Development Areas (PDAs). As described in the EDA Plan, redevelopment in these PDAs will help meet projected regional demands for housing and commercial uses and strengthen existing places by improving the mix of development types in areas where development already exists. The PDAs are sited in areas defined as having major growth potential and near existing transportation resources including public transit, bike, and trail facilities, thus contributing to the creation of more walkable communities.



Reading Priority Development Areas  
Source: EDA Plan

The four PDAs are described below, as excerpted from the EDA Plan (page 6):

**PDA #1 - Downtown**

**Reading.** PDA #1 is a nine-acre area consisting of 46 parcels – the Town's 40R Smart Growth Overlay District was expanded to include a portion of this area

(PDA #1A) in April 2017. PDA #1A is bounded by Haven Street, Main Street, Washington Street, and High Street and includes mixed use, commercial, and residential development. Since the EDAP was adopted in 2015 the Ace Flats 40R (24 Gould Street), located in PDA #1A, has reached completion. PDA #1B is adjacent to the Commuter Rail and is bounded by Lincoln and Prescott streets and includes commercial and residential development – this property is the location of an approved and completed Comprehensive Permit project – The Metropolitan at Reading Village.

**PDA #2 – South Main Street.** PDA #2 is a 26-acre area consisting of 82 parcels located south of the downtown on South Main Street. PDA #2A presently contains primarily low-density commercial development and underutilized parcels. PDA #2B consists primarily of low-density residential development. The Town is interested in facilitating more retail and mixed-use development and implement streetscape and road reconfigurations that will enhance safety and the street's overall connectivity to downtown. In 2019 the Town proposed and adopted a Mixed-Use Bylaw in the Business-A Zoning District, included in PDA #2A and #2B. The Mixed-Use Bylaw allows a mixed-use development through a Special Permit granted by the CPDC and requires both commercial floor area and affordable units for projects 10 units or more. Affordable units are required for 10% of the project units and required for at least 80% AMI.

**PDA #3 – New Crossing Road Redevelopment District and Ash Street Parcels.** PDA #3 consists of the five-acre New Crossing Road Redevelopment District, which consists of four parcels and includes vacant lots, derelict buildings, sites with industrial uses, and adjacent parcels on Ash Street. In 2019 the Town used an awarded Massachusetts Downtown Initiative (MDI) Grant to facilitate conversation around future uses and development in this priority area. Gamble Associates was contracted with and proposed visioning renderings for the area designated as 'The Eastern Gateway/The Yard'. Numerous public engagements, workshops and discussions were held. Desired vibrant uses and pedestrian improvements/connections were noted – and while mixed-use development can facilitate improvements concerns of losing too much commercial area were noted. Future zoning additions or amendments should look to address the need for vibrant commercial uses without limiting the market for development.

**PDA #4, - 1 General Way.** PDA #4 is one large 20-acre parcel with a mix of single-story commercial uses and ample parking. The Town is interested in facilitating a more vibrant mix of uses and structures of different densities in this area. Conceptual improvements extended and derived from the Eastern Gateway Initiative described above may be extended to this parcel in future discussions.

**Consider zoning changes to promote more compact, mixed-use development**

A Mixed-Use Bylaw for PDA #2 (South Main Street) was adopted in 2019. The Bylaw language allows for Mixed-Use development by Special Permit and includes an Inclusionary Zoning requirement for projects 10-units or more. The Bylaw includes commercial space requirements to maintain a level of commercial development on the Town’s main corridor; parking requirements for residential and commercial uses; and, dimensional controls. However, it also allows the ability to apply for a waiver of these dimensional requirements to promote design flexibility and to achieve appropriate densities. The Bylaw has not been utilized since its inception, though important to note that the Covid-19 pandemic and high inflation occurred in the subsequent years after adoption. Future improvements to the bylaw may be considered to further promote development.

**Consider zoning changes to parking requirements to promote more compact, mixed-use and/or multi-family development**

In accordance with the recommendations of the Reading Economic Development Action Plan 2016-2022, evaluate parking requirements and consider zoning amendments to make parking requirements consistent with best practices.

**Strategy 3: Adopt and/or Strengthen Inclusionary Zoning bylaw**

The purpose of inclusionary zoning bylaws (IZ) is to ensure that production of affordable housing units keeps pace with construction of new dwelling units. IZ mandates that developers provide affordable housing units in addition to market-rate housing. Section 9 of the Zoning Act authorizes communities to adopt bylaws that require a developer to provide a certain portion of affordable units (usually 10% to 25%) within an overall development. To help offset the cost of providing these units, the bylaw may offer an incentive, most commonly a density bonus. Other incentives include a waiver of zoning requirements or

permit fees, fast-track permitting, local tax abatements, and subsidized infrastructure.<sup>9</sup>

Many variations of inclusionary zoning provisions have been adopted in Massachusetts communities with varying levels of success at producing affordable units. IZ provisions include:

- a unit threshold that triggers the affordable unit requirements
- minimum percentage of affordable units required
- maximum household income targets (e.g., at or below 80 percent of the areamedian income)
- eligibility for the state’s Subsidized Housing Inventory
- density bonuses, if applicable

For example, density bonuses are sometimes offered to encourage deeper affordability of units (e.g., units affordable to extremely low-income households) or a higher percentage of affordable units.

The Town should consider including language in its IZ to allow for cash payments, off-site units, and/or donated buildable land as an alternative in lieu of construction of affordable units. The monetary payments and donated buildable land could be allocated to the Reading Affordable Housing Trust to create or preserve affordable housing.

It will be important to examine the most current information regarding best practices for Inclusionary Zoning provisions and to customize/improve Reading bylaws to ensure a successful outcome.

#### **Strategy 4: Amend the Zoning Bylaw to explicitly permit and define Congregate Housing**

Congregate housing is a shared living environment designed to integrate the housing and services needs of elders and disabled individuals. The goal of congregate housing is to increase self-sufficiency through the provision of supportive services in a residential setting. Some types of congregate housing are often in converted single-family homes; however, the Reading zoning bylaw restricts dwelling units to “families” of not more than four unrelated individuals, and this restriction may pose an issue in certain situations for congregate housing, which will often house up to 16 people.

<sup>9</sup> Excerpted from the Housing Toolbox for Massachusetts Communities: <https://www.housingtoolbox.org/zoning-and-land-use/adaptive-reuse>

In addition, congregate housing sometimes provides small kitchen facilities in each private unit in addition to the shared common facilities, which may constitute multi-family housing under the current bylaw’s use regulations and thus be prohibited in certain residence districts (S-15, S-20, and S-40).

Reading’s zoning bylaw does not appear to explicitly define or permit congregate housing (a.k.a. group homes), which can be an important housing

Commented [NL27]: Nicole to find where this belongs.

choice to accommodate later life stages for an older population and provide supportive housing for individuals with disabilities.

The Reading zoning bylaw provides the below definition for “family,” which presents Fair Housing considerations. Policies that require relations by blood/marriage and/or have a limit of unrelated adults in a household may be considered discriminatory if they have an adverse impact on a protected class including people with disabilities. For example, limiting the number of unrelated persons in a dwelling can impact group home uses, foster families, or other alternative household composition.

*Family: One or more persons living together in one dwelling unit as a single housekeeping unit; provided, however, that a group of more than four individuals who are not related by blood, marriage, or legal adoption shall not be deemed to constitute a family.*

*Dwelling, single family: A detached dwelling unit arranged, intended or designed to be occupied by only one family.*

However, it is important to note that despite these limiting definitions and lack of zoning provisions for congregate housing or group homes, the Dover Amendment exempts educational uses from local zoning and programs and services that provide support, training, and skill building for persons with disabilities have been found to be educational in nature.

Many congregate living and group home facilities provide such services to residents and would qualify as educational in nature. In addition, federal laws prohibit municipalities from discriminating against persons with disabilities through their land use and zoning policies.<sup>10</sup>

The zoning bylaw should be amended to ensure consistency with these laws and to explicitly permit congregate housing in all residential districts. This strategy would help to support the local initiative Strategy 8 to identify existing houses with potential for conversion to congregate housing.

### **Identify existing houses with potential for conversion to congregate housing.**

Congregate housing, a shared living environment designed to integrate the housing and services needs of elders and disabled individuals, is often created by converting larger single-family homes to house up to 16 residents with private bedrooms and shared common areas including kitchen, living, dining, and outdoor space. Congregate housing will often also have a resident manager with a small (accessory) apartment within the house or in an outbuilding on site. In addition, it is often beneficial for congregate housing to be in a walkable neighborhood that is close to community services, shops, and public transportation including bus and commuter rail.

The town, perhaps working through the AHTF and in conjunction with community partners, should inventory existing single-family properties to

**Commented [MA28]:**<sup>10</sup> Federal laws referenced here includes Section 504 of the Rehabilitation Act of 1973, the Fair Housing Amendments Act of 1988, and the American with Disabilities Act of 1990.

**Commented [NL29R28]:** Footnote

identify potential for conversion to congregate housing. AHTF funds could support acquisition and/or rehabilitation costs of community partners to facilitate such conversions.

**Strategy 5: Review and amend zoning requirements as necessary for pre-existing non-conforming residential uses.**

Reading Zoning Bylaw Section 7 regulates non-conforming lots, uses, buildings and structures, as provided in Section 6 of Chapter 40A of the Massachusetts General Laws. This Bylaw relates heavily to non-conforming single- and two-family uses/structures and how to regulate them, most commonly through a Special Permit granted by the local Zoning Board of Appeals (ZBA). The Bylaw does not clearly articulate how to allow for the improvement or re-development of pre-existing non-conforming multi-family uses in the single-family zoning district and thus a Special Permit process is required. There are a number of three-, four- or greater unit structures in the single-family districts. Many of these dwellings were developed prior to the current zoning requirements. It has been noted that the Special Permit process is a deterrent to owners who look to rehabilitate the outdated structures. And in many cases the development would simultaneously require a Site Plan Review process.

The Town may wish to consider more directly addressing “other non-conforming uses” in Section 7 and provide opportunity for by-right improvements on pre-existing multi-family structures.

**Strategy 6: Consider zoning amendments to allow Accessory Dwelling Units (ADU's) by-right and/or lessen restrictions on such.**

Section 5.4.7 of the Reading Zoning Bylaw provides the terms and limitations on the establishment of Accessory Apartments across Reading. Reading adopted the ADU bylaw in 1983 (revised 2017) and has continued to promote the development of such units to offer a means of increasing housing options without adverse impacts on community character. Reading allows for both attached and detached accessory apartments on single-family dwellings. Section 5.4.7.3 includes ‘performance standards’ each ADU is subject to, including maximum square footage, number of occupants allowed, a requirement that the homeowner reside in the principal dwelling or ADU, and more.

While ADU’s within (attached) principal dwellings that require no increase in Gross Floor Area are allowed by-right, many other variants require a Special Permit process through the Reading Zoning Board of Appeals. Accessory apartments that require new Gross Floor Area, or those within existing accessory buildings, trigger the Special Permit process. During many of the public hearings for such it has been noted by applicants (generally homeowners and/or their designers) that the process is time consuming and delays contracting the work. Many ADU’s are originally proposed to support small

Commented [NL30]: Is this still true?

Commented [MA31]: I will try to find out how many we have permitted as well.

family needs and the public has asked to make the process less cumbersome. However, it is important to note that the public hearing/special permit process allows for the notice of such uses and for discussion/education on concerns such as use as short-term rentals, parking needs, design, etc. It also allows for the conditioning of approvals as needed.

The Town may consider reviewing the bylaw for potential improvements for local homeowners.

**Strategy 7: Continue to provide necessary support for 40R, 40B/Comprehensive and Local Permit applications.**

The Town has had multiple development proposals in recent years that can help to create a more diverse housing stock including affordable and mixed-income units. The Town should continue to provide technical and political support for appropriate projects that further the Town’s housing and economic development goals. These projects could be developments in 40R Smart Growth Districts, 40B Comprehensive Permit applications, or local permit applications.

**Strategy 8: Preserve existing affordable housing stock to ensure they remain affordable and qualify for SHI.**

**Explore partnership opportunities with the Reading Housing Authority to create and preserve public housing units**

The Reading Housing Authority (RHA) was established in 1963 and has been developing and operating housing for low-income elderly/handicapped persons, families, and people with special needs throughout the Town of Reading. The Authority owns and manages public housing units for both families and seniors.

The RHA owns fourteen (14) or so units of housing that it leases to income eligible tenants. These units are currently unrestricted, despite efforts to work with the RHA to preserve units on the SHI. Some units have expired restrictions, and were recently lapsed from the SHI. In 2017, the Housing Authority hired a new director, which presents an opportunity for the Town to revisit collaborative efforts to restore the affordability of these units by regulating them as Local Action Units under the Local Initiative Program. The Town has identified locations of these fourteen units as follows: Summer/Main (6), Sanborn Schoolhouse (4), 13 Pierce (1), and Gazebo Circle (3).

**Commented [NL32]:** Is this unit count still the same?

**Commented [NL33R32]:** Have any of the properties listed been able to regain their affordability restrictions?

**Commented [MA34R32]:** Will need to check with Katie



some potential for development of additional units. In addition to exploring the development potential of the Housing Authority's existing properties, the Town plans to work collaboratively with the Housing Authority to identify other properties for possible expansion of the public housing inventory—possibly through the development or redevelopment of tax-foreclosed, foreclosed, and/or surplus public properties, as described above. Town-owned land along Oakland Road has been under consideration for the development of affordable housing; however further public engagement around the site and use is recommended.

**Strategy 9: Maintain Safe Harbor designation by maintaining, tracking and continuing pace of affordable housing development to exceed 10% SHI target.**

The Subsidized Housing Inventory (SHI) is a fluid number that is subject to constant change. This is because units on the SHI may fall off of the list if a unit's deed restriction is not continued, if building permits have not been received in a timely manner since approval, or if occupancy is not reached one-year after building permit. Units on the SHI should continue to be tracked to ensure they do not relinquish their status on the inventory and request for new units should be submitted as soon as projects become eligible.

**Strategy 10: Preserve/protect/enhance existing parks, open space and conservation land for long-term accessibility and use by residents. Require open space, trails and/or path connection (sidewalk, bike path, trails, transit-oriented improvements) in new residential, multi-family and mixed-use developments.**

The Town recently adopted an updated Open Space and Recreation Plan in 2022, which includes a series of recommendations for the preservation, acquisition and/or development of open space. And while the plan covers open space and recreation in a broader sense across the entire Town, it also includes the recommendation for connecting open space to new development(s).

During the 40R Bylaw update in 2022 it was strongly expressed that the downtown 40R and nearby 40B developments need more green space, open space and/or shading. Efforts were made to require open space in future 40R application in a flexible manner to achieve a mix of desired improvements. Open space may be considered public or private; may be green space or urban space to allow for uses such as outdoor dining; or, may include sidewalk and path connections to heavily utilized areas nearby. It should also be noted that private amenity space such as balconies, courtyards and shared terraces are a desirable 'open to the air' use in urban developments.

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Reading also looks to encourage Low Impact Design (LID) and the use of green

infrastructure to manage stormwater impacts of housing and urban developments. Green infrastructure, such as bioswales and raingardens, as well as strategies to reduce development footprint on the environment, are strongly encouraged but not always explicitly required.

Regulatory documents can require such open space improvements or LID infrastructure and the Town should review the Zoning Bylaw, Stormwater Bylaw, Stormwater Regulations, updated in 2021 - 2022, and Subdivision Regulations to ensure the desired standards are included.

**Commented [MA35]:** Though we did update these in 2021-22 for MS4 permitting needs.

**Commented [NL36R35]:** Added information that these were updated.

**Strategy 11: Ensure future Net Zero and energy efficiency requirements/standards are met in new development that provide cost savings to end users (residents).**

The Town plans to undergo a Net Zero Plan process during 2023 to effectively strategize greenhouse gas reduction across a number of sectors (i.e. transportation, building, waste, etc.). The Net Zero Plan would help align the Town with State initiatives and requirements. The Town should expect recommendations on how to include energy efficiency and renewable infrastructure requirements for new development. The Net Zero Plan should also target strategies to improve existing homes and affordable unit efficiency.

XXX

**Commented [MA37]:** We may wish to include language on state programs such as MassSave, etc.

**Commented [MA38R37]:** RMLD programs?

**Funding and Resources Strategies**

Local initiative strategies refer to recommendations that the town can undertake to foster the creation of more housing options, especially affordable housing. These initiatives are not regulatory in nature – they deal with allocation of town resources including staff time, funding, and property.

**Commented [NL39]:** Nicole to update adding CHAPA, Emergency Task Force.

**Commented [MA40]:** This needs to be updated.

**Commented [MA41]:** <sup>12</sup> Mitchell, Robert P., FAICP, *Affordable Housing Trust Funds: A Report to the Town of Reading, MA. 2013.*

**Strategy 1: Strategize use of Affordable Housing Trust Fund (AHTF) and look to increase revenue sources dedicated to AHTF.**

The town adopted the Reading Affordable Housing Trust (AHTF) through a special act in 2001. In 2001 the Reading Town Meeting passed a warrant article which authorized the Selectmen to petition the Massachusetts General Court to establish an Affordable Housing Trust Fund for creation and preservation of affordable housing. The State legislature approved the special legislation. The Board of Selectmen act as the Trustees of the Trust.<sup>12</sup>

**Commented [MA42R41]: Partial List of Potential Funding Sources for Affordable Housing Trusts**

Inclusionary Zoning payments, including 40R incentive payments

**Payments in lieu of providing affordable units**

- Voluntary developer payments
- Proceeds from sales of surplus municipal or tax-foreclosed properties
- Private donations
- Revenue from the lease of municipal land for cell towers
- Proceeds from resale of affordable units

The AHTF is required to submit an allocation plan to Town Meeting annually indicating how Trust funds will be utilized in the coming year and accounting for how the prior year's funds were allocated. The AHTF requires a majority vote of the full combined membership of the Board of Selectmen and Housing

Authority for all expenditures.

### Secure additional funding for the AHTF

Adoption of an Inclusionary Zoning bylaw with provisions for cash payments in lieu of units can provide a source of revenue for the AHTF, in addition to other potential sources (see side bar above). **The current balance of the AHTF is approximately \$263,000.** The AHTF's past funding sources included the buy-out of an affordable unit at Sumner Cheney and the sale of surplus lands. No Town-generated funds have been allocated to the AHTF.

Commented [NL43]: Has any of this changed?

### Collaboration with Community Partners

The AHTF funds can be leveraged by working in collaboration with community partners including non-profit housing organizations to create and preserve affordable housing. The AHTF funds could support a first-time homebuyer program (see below), locally- initiated developments, or other local initiative strategies.

**Note:** There is a new state funding source—MassHousing's Planning for Housing Production Program<sup>8</sup>—that could help to support Reading's efforts to implement the plan's regulatory strategies. The Program provides municipalities with funding for additional technical capacity to implement recommendations of the housing production plan and deliver new mixed- income housing.

Commented [NL44]: Was this completed?

Commented [MA45R44]: To my knowledge we have not used such to date but we should include it as a potential strategy under Funding/Resources strategies!

Commented [MA46R44]: <https://www.masshousing.com/en/programs-outreach/planning-programs/planning-housing-production#:~:text=MassHousing's%20Planning%20for%20Housing%20Production,deliver%20new%20mixed%20income%20housing.>

### Strategy 2: Explore Creation of a First-Time Homebuyer Program

AHTF funds can be used to support the programmatic and administration costs of homeownership assistance programs, which assist low- to moderate-income households to purchase a home. The programs can be designed in a variety of ways including the following three examples:

1) Down Payment Assistance: Down payment assistance programs provide financial support to assist with down payment and closing costs. This assistance is provided in the form of deferred payment loans with recapture provisions. However, this type of program does not create units that would count on the state's Subsidized Housing Inventory because the subsidy provided is modest and would not create a deed-restricted unit—therefore, Reading would benefit from considering alternative models, as described below.

2) Purchase/Rehab Model: In this model, the sponsoring entity, such as the AHTF or a non- profit organization, acquires property, rehabilitates it as necessary, and sells it to a qualified buyer for an affordable price with a deed restriction to secure ongoing affordability. It is important to determine an acceptable level of rehabilitation for the subject properties which stays within the program's budget and does not place unreasonable repair costs on the new homebuyer. These units may be eligible for inclusion on the state's Subsidized Housing Inventory.

3) Subsidy Model: In this model, the sponsoring entity, such as the AHTF or a non-profit organization (Community Housing Development Organization or Town of Reading Housing Production Plan, 2023 Renewal

CHDO), qualifies potential buyers, who then locate a market rate home to purchase with the help of a subsidy from the sponsoring entity which buys-down the cost of the mortgage to an affordable price. A permanent deed restriction is then executed for the property to secure ongoing affordability. It is critical to set program parameters, including maximum subsidy per unit, maximum property acquisition cost, and minimum property condition/rehabilitation needs with quality standards, at the start of the process to ensure the sustainability of the program. These units may also be eligible for inclusion on the state's Subsidized Housing Inventory.

In all of these homeowner assistance models, the sponsoring entity must create a transparent, fair, and affirmative process to market the program and select qualified buyers to ensure compliance with federal Fair Housing laws and the Massachusetts Anti-Discrimination Act.

For the units to count on the state's Subsidized Housing Inventory, the program guidelines and marketing plan must meet with the requirements of the Department of Housing and Community Development (DHCD) under the state's Local Action Unit program. Units must have a permanent deed restriction, be affirmatively and fairly-marketed, and comply with DHCD's resident selection criteria.

### **Strategy 3: Seeking sources to create a local aging-in-place program.**

To help low-income seniors afford to stay in their home as they age, it can be helpful to fund small repairs and safety improvements including handicap accessibility improvements. The town could fund such a program. There are many models. It will be important to design a model program that has limited administrative needs, due to limited staff capacity.

As an example, the town of Agawam applied for \$85,000 in federal Community Development Funds to create the Agawam Aging in Place Program (AIP Program).<sup>13</sup> The AIP Program would provide grants up to \$5,000 per qualified senior household to complete non-structural modifications to increase the health and safety of the occupants. To be eligible, owner occupants must be 65 years of age or older, meet HUD income guidelines for low/moderate-income persons, and have home safety needs that fall under the purview of the program.

Funding per unit would vary from a few hundred dollars to the maximum \$5,000 to support improvements to the health and safety of participants' homes allowing seniors to remain living independently in their own homes. Specific improvements will include the installation of grab bars, door levers, slip resistant

**Commented [NL47]:** Reading to explore. Has any framework been set up around this since the last plan?

**Commented [MA48]:**<sup>13</sup> Although Agawam did not receive the award of federal funds in FY2018, the city is applying again for FY2019.

**Commented [NL49R48]:** Footnote

the cleaning of furnaces and chimneys or other similar work and activities.

**Strategy 4: Investigate opportunities to provide/increase Veteran’s Affairs Supportive Housing vouchers.**

**Strategy 5: Build support for Community Preservation Act (CPA) adoption**

**Strategy 6: Maintain Housing Choice Initiative (HCI) designation for future grant and funding opportunities.**

**Strategy 7: Consider implementing Commercial Linkage Fees to help support affordable housing needs.**

**Strategy 8: Develop strategy for locally-initiated development of affordable housing.**

**Continue to catalogue, prioritize and target tax-foreclosed, foreclosed, and surplus public properties with development potential**

Tax-foreclosed, foreclosed, and underutilized surplus public properties can have negative impacts on neighborhoods and municipal finance. These properties can be developed or reused as affordable, mixed-income housing and/or mixed-use development and can present opportunities for neighborhood improvement.

The Town has been tracking such properties and should continue to do so to identify properties with development potential for town acquisition and/or or a cooperative effort with non-profit partners.

In addition, the Town should adopt a tax title disposition plan or policy that lays out a process for town officials, including the Treasurer, to work collaboratively to foster development/reuse for affordable housing of appropriate properties. Property acquired in tax title foreclosure can be disposed of under Chapter 60 by auction or under Chapter 30B when the tax title custodian transfers the property to another municipal agency (including an Affordable Housing Trust). Such a property disposition through Chapter 30B can specify that the property be developed within a time frame and for a specific purpose, including affordable housing.<sup>11</sup>

**Commented [NL50]:** Do the tax title properties become owned by the Town?

**Commented [NL51R50]:** I have a list Julie sent me a while back.

**Commented [MA52]:**<sup>11</sup> Source: CHAPA, *Back on the Roll in Massachusetts: A Report on Strategies to Return Tax Title Properties to Productive Use, 2000.*

**Current Tax Title Inventory:** As of October 2017, the town had three tax title properties with existing single-family houses that could have potential for conversion to affordable units (9 Swan Road, 179 Pearl Street, and Brook Street/Redfield Road).

**Public Property:** There are roughly 332 acres of state land including Camp Curtis Guild (25 River Road) with 291 acres (part of which is under consideration for use as a new DPW garage). The property will require further study to determine if there are environmental constraints or contamination. State land also includes a property at 9 Causeway Road (lot 31-9) with 4.7 acres. In addition, the Town declared an approximately 4.3-acre parcel on Oakland Road (near the High School) as surplus in April 2017. The Board of Selectmen will establish a fully public process to help determine the future disposition of the land; many options for development or use of this parcel are possible.

**Strategy 9: Consider tax incentives for inclusion of deeply (i.e. 50% AMI) affordable units.**

**Strategy 10: Plan for cases of emergency housing needs.**

## Leadership, Partnership & Education Strategies

### Strategy 1: Foster partnership initiatives with landlords to upgrade existing apartment complexes and convert to affordable apartments.

Reading has a significant stock of rental units in older, mid-size to larger rental complexes of 20+ units. About 40 percent (777) of rental units are in buildings with 20+ units.<sup>14</sup> Of these units, about 38 percent are in older buildings that were constructed prior to 1980.<sup>15</sup> Community workshop participants supported upgrading older apartment complexes and converting more market-rate rental units to affordable units that would count on the SHI. The Town could work to foster and support private landlords to upgrade and convert some of their existing units to affordable apartments.

The Town could target local funds (e.g., AHTF) to work with private partners to purchase, upgrade, and convert. The Town could release a Notice of Fund Availability (NOFA) or Request for Proposals (RFP), in accordance with MGL c.30B, to seek proposals from private developers or existing property owners to upgrade the complex and units in return for long-term affordability restrictions.

In addition, the Town/AHTF could work collaboratively with property owners and non-profit organizations to encourage use of the state's new Donation Tax Credit for property donations to non-profit organizations to convert existing buildings to affordable units. As part of the **Act Relative to Job Creation and Workforce Development (H.4569)**, the state created the Donation Tax Credit that provides a credit against Massachusetts income tax liability for property owners who donate existing housing properties or other structures for the conversion of housing to qualified non-profits that commit to long-term affordability. The credit is worth 50 percent of the donated value but may be increased to 65 percent by DHCD. Perhaps in Reading this tax credit could help to encourage conversion of market-rate apartment complexes to affordable units.

### Strategy 2: Seek proposals from private developers or property owners to upgrade developments or units in return for long-term affordability restrictions.

### Strategy 3: Maintain and continue to build Interested Buyers List

### Strategy 4: Work in cooperation with community partners to promote enhanced public understanding of housing needs and creation of affordable housing opportunities

The Town, working with community partners, should expand community outreach and education efforts by initiating a public awareness campaign to build and maintain support for local affordable housing initiatives. Towards that end, the Metro North Regional Housing Services Office could help with this effort by clearly articulating the unmet local housing needs, perhaps through creation of infographics to include in brochures, posters, and online.

**Commented [MA53]:** <sup>14</sup> 2012-2016 ACS, B25032: Tenure by Units in Structure.

**Commented [NL54R53]:** Footnote

**Commented [MA55]:** <sup>15</sup> 2012-2016 ACS, B25127: Tenure by Year Structure.

**Commented [NL56R55]:** Footnote

**Commented [NL57]:** Offering funds for LL's to do upgrades and incentivize them somehow to keep the rent affordable.

**Commented [NL58R57]:** Added wording around landlord incentives.

In addition, the Town could solicit the assistance of other organizations to help with this effort, such as the Reading Clergy Associations or other groups invested in issues related to affordable housing.

As part of this effort, the Town and Metro North Regional Housing Services Office could consult a variety of publications exploring a variety of concerns and debunking myths related to multifamily housing development and density. For example, the Massachusetts Housing Toolbox may provide ideas to help gain support and address fears of new development, specifically around affordable housing initiatives, including strategies for community engagement and dispelling misperceptions: <https://www.housingtoolbox.org/>

There are multiple organizations working to create or preserve affordable housing and to provide needed services in Reading and the region such as Habitat for Humanity and Mystic Valley Elder Services. The Town has established strong dialogue with these organizations and should continue to have regular dialogue with non-profit entities to promote the creation of affordable housing opportunities, possibly in combination with fostering local initiative projects, as described earlier in this section.

**Commented [NL59]:** Are there any other local housing developers/providers that we can also partner with?

### **Strategy 5: Continue to support the work of the Metro North Regional Housing Services Office**

The Town of Reading is the host town for the Metro North Regional Housing Services Office (MNRHSO). The MNRHSO includes the towns of Reading, North Reading, Wilmington, Woburn and Saugus. The MNRHSO provides affordable housing support and information to member communities and citizens looking to live in our region. Its primary task is monitoring the more than 3,800 units in the five-member towns with the mission of expanding low- and moderate-income housing options and ensuring that owners of affordable properties are in compliance with their restrictions.

The MNRHSO maintains a website with useful information for current and future residents of the member towns including housing opportunities, refinancing instructions, and current inventory presentations. Their website is [www.mnrhso.org](http://www.mnrhso.org).

**Commented [NL60]:** Added correct website.

### **Strategy 6: Continue public engagement and education on regional/local housing needs.**

By expanding community outreach and education practices the Town can better help residents understand the regional housing need and how such impacts the local area. Initiating a public awareness campaign to build and maintain support for local affordable housing initiatives, whether locally initiated or private development, is recommended. By clearly articulating the unmet housing needs through infographics, brochures, online information, etc. support can be built. Improved outreach practices to vulnerable residents and geographies should be planned for and prepared. This may include specific working group meetings, language translation services and opportunities to partner with local and regional organizations should also be sought to help. For example, the Citizen's Housing and Planning Association (CHAPA) programs the Municipal Engagement Initiative (MEI) Lite Community Program to build support for affordable housing production across the State.

**Commented [MA61]:** <https://www.chapa.org/about/programs/municipal-engagement-initiative>

**Commented [MA62R61]:** Are there other programs like this Reading can explore?



The Table below shows the relationship between the Goals and Strategies. Some strategies address multiple goals. All goals are addressed by at least one strategy.

	Goal 1: Create SHI Units	Goal 2: Support Residents	Goal 3: Preserve Units	Goal 4 Manage Growth	Goal 5: Rental Support	Goal 6: Education and Relationships
Strategy 1: Encourage mixed-use development in the Priority Development Areas by considering adoption of various regulatory tools	*			*		
Strategy 2: Adopt an Inclusionary Zoning bylaw	*			*		
Strategy 3: Amend the Zoning Bylaw to explicitly permit congregate housing	*	*				
Strategy 4: Provide necessary support for 40R, 40B/Comprehensive and Local Permit applications.	*					
Strategy 5: Seek opportunities for locally-initiated development of affordable housing	*			*		*
Strategy 6: Strengthen the Affordable Housing Trust with additional sources of revenue and further collaboration	*	*	*		*	*
Strategy 7: Explore creation of a First-Time Homebuyer Program	*					
Strategy 8: Identify existing houses with potential for conversion to congregate housing	*	*				*
Strategy 9: Seek funding to create a local aging-in-place program		*				
Strategy 10: Foster partnership initiatives with landlords to upgrade existing apartment complexes and convert to affordable apartments	*				*	*
Strategy 11: Work in cooperation with community partners to promote enhanced public understanding of housing needs and promote creation of affordable housing	*					*
Strategy 12: Continue to support the work of the Metro North Regional Housing Services Office						*

**Action Plan**

The Reading Public Services Department, specifically the Planning Division, having spearheaded this planning effort, will be the natural entity to oversee all aspects of its implementation and to provide regular updates on progress to the Board of Selectmen and Community Planning and Development Commission. The matrix below provides more specific assignment of responsible entity, supporting entity, and timeframe to implement the housing strategies.

Housing Strategies	FY2018	FY2019	FY2020	FY2021	FY2022	Responsible Entity	Supporting Entities
Strategy 1: Encourage mixed-use development in the Priority Development Areas by considering adoption of various regulatory tools						CPDC Town Meeting	Planning Division
Strategy 2: Adopt an Inclusionary Zoning bylaw						CPDC Town Meeting	Planning Division
Strategy 3: Amend the Zoning Bylaw to explicitly permit congregate housing						CPDC Town Meeting	Planning Division
Strategy 4: Provide necessary support for 40R, 40B/Comprehensive and Local Permit applications.						Planning Division	Boards, Committees & Commissions
Strategy 5: Seek opportunities for locally-initiated development of affordable housing						BOS RHA	Planning Division
Strategy 6: Strengthen the Affordable Housing Trust Fund with additional sources of revenue and further collaboration						BOS Town Meeting Town Manager	RHA
Strategy 7: Explore creation of a First-Time Homebuyer Program						Planning Division	Local banks
Strategy 8: Identify existing houses with potential for conversion to congregate housing						Planning Division	State
Strategy 9: Seek funding to create a local aging-in-place program						Planning Division Human Elder Services Division	BOS Council on Aging
Strategy 10: Foster partnership initiatives with landlords to upgrade existing apartment complexes and convert to affordable apartments						Planning Division Town Manager	State
Strategy 11: Work in cooperation with community partners to promote enhanced public understanding of housing needs and promote creation of affordable housing						Planning Division	Community Partners
Strategy 12: Continue to support the work of the Metro North Regional Housing Services Office						Planning Division Town Manager	Town Meeting BOS

AHT = Affordable Housing Trust  
 CPDC = Community Planning and Development Commission  
 BOS = Board of Selectmen

## Appendices

### Housing Profile

# Reading, MA Housing Profile

## Summary of Housing Needs & Demand

Commented [NL63]: I will update this page later.

### POPULATION & HOUSEHOLDS (Census)

- As of the 2010 US Census, the population of Reading is 24,747, an increase of 4.4% since 2000.
- In 2010, the largest age group of Reading's population was 35-54 year olds (35% of total population).
- Between 2000-2010, population change by age groups was:
  - 0-9 years old decreased by 4.8%
  - 10-19 years old increased by 6.6%
  - 20-24 years old increased by 26.9%
  - 25-34 years old decreased by 8.9%
  - 35-59 years old increased by 3.8%
  - 60-74 increased by 17.1%
  - 75+ increased by 12.6%
- As of the 2010 Census, 35.9% of Reading's 9,305 households (a household consists of all those occupying one housing unit), have children under 18 years old, and 26.3% have persons age 65+.
- The median age increased from 39.1 years old in 2000 to 41.6 years old in 2010.
- Racial make-up is predominantly white, with 93.5% of the population; 4.2% of the population is Asian; 1.5% of the population is Hispanic or Latino.
- 9% of Reading's total population and 37.2% of Reading's 65+ population reports having one or more disabilities.

### HOUSEHOLD INCOME & COST OF HOUSING

- In 2015, Reading's median household income was \$107,654; a 39.7% increase from 1999, and significantly more than the Boston-Cambridge-Quincy Metro Area (\$98,500) or the state as a whole (\$68,563). (ACS)
- An estimated 26.3% of Reading households have incomes at or below 80% of AMI. (CHAS)
- 2.8% of Reading's population is below the poverty line (annual income below \$24,600 for a household of 4), much lower than Middlesex County (8.4%) and Massachusetts (11.6%). (ACS)
- The 2016 median price of single family homes in Reading was \$525,000. The 2016 median price of all homes, including condos, was \$479,600. After a dip in prices during the national recession in the mid-2000's, housing prices have been rising steadily since 2012 and are now the highest they have ever been. (Warren Group)
- Of the 7,405 of Reading households who own their homes, 29.4% are cost-burdened (spending over 30% of their income on housing), while 33.1% of Reading's renters cost-burdened. 71% of Reading's low-income households are cost-burdened. (CHAS)
- A recent survey of available rentals on Trulia.com shows a median rent in Reading of \$2,100. The Census reports a median gross rent in Reading of \$1,282.

### HOUSING SUPPLY (Census & ACS)

- The 2011-2015 ACS reports that of Reading's 9,168 occupied housing units, 78.2% are owner occupied and 21.8% renter occupied.
- The number of owner-occupied units increased by 83 while the number of rental units increased by 534 between 2000 and 2010.
- The Town's housing stock remains primarily single-family at 74.8% of total housing units, 7.5% of units are in two to four family buildings, 7% of units in 5-19 unit buildings, and 10.6% of units in multi-family buildings with 20 or more units.

### AFFORDABILITY (DHCD Sales Price Calculator, Trulia.com, CHAS)

- 8.78% (841 units) of Reading's total housing stock is counted as affordable on the State's Subsidized Housing Inventory (SHI), which falls short of the State's minimum affordability goal of 10%.
- A low-income 3-person household earning 80% of the Area Median Income (AMI) could roughly afford a home that costs \$262,000 or a monthly rent of \$1,760. There are 780 Reading households (8.4%) who earn 80%-100% AMI and Trulia.com (as of September 2017) shows that there are 2 homes (both small condos) for sale in Reading under \$300,000. There are 3 rental units at this rent.
- Reading's 2016 median sale price of \$525,000 requires an annual income of approximately \$140,918, over \$33,000 higher than Reading's median household income of \$107,654.
- Based on the median sale price, Reading's ownership affordability gap is \$125,000 for median income households, and \$263,000 for low income households. Based on current median rents, Reading rentals are out of reach for low-income households. In addition, there are not very many rentals available.

### AFFORDABLE HOUSING STOCK (DHCD SHI & CHAS)

- There are 841 units listed on the SHI, 91 ownership and 750 rental units.
- Most (87) of the affordable ownership units were built through the Local Initiative Program (LIP) – 34 units, or through Chapter 40R permits as part of smart growth zoning districts – 53 units.
- Of the 750 rental units on the SHI, 325 are family units, 268 are age-restricted, 71 are supportive housing units for people with disabilities, and 86 are assisted living units.
- Only 109 of the family rental units are affordable to households earning 80% or less of the AMI; the rest are market-rate units.
- Approximately 2,445 households (26.3% of total households) are eligible for affordable housing, but there are only 570 housing units in Reading restricted for households at or below 80% of AMI.

*The Bottom Line:* Reading has grown since 2018, with increases in population, the number of households, and housing units. In particular, the growth of the 65+ population and is projected to continue. Reading's median income has risen significantly, but nearly 1/4 of the population is low-income, and 30% of households are housing cost-burdened. Much of Reading's housing stock is out of reach for lower income households. There is a need for more affordable housing.

Income Limits (2022)

Published Annually by Housing and Urban Development (HUD)

FY 2022 Income Limit Area	Median Family Income <a href="#">Click for More Detail</a>	FY 2022 Income Limit Category	Persons in Family							
			1	2	3	4	5	6	7	8
<b>Boston-Cambridge-Quincy, MA-NH HUD Metro FMR Area</b>	\$140,200	Very Low (50%) Income Limits (\$) <a href="#">Click for More Detail</a>	49,100	56,100	63,100	<b>70,100</b>	75,750	81,350	86,950	92,550
		Extremely Low Income Limits (\$)* <a href="#">Click for More Detail</a>	29,450	33,650	37,850	<b>42,050</b>	45,450	48,800	52,150	55,550
		Low (80%) Income Limits (\$) <a href="#">Click for More Detail</a>	78,300	89,500	100,700	<b>111,850</b>	120,800	129,750	138,700	147,650

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Sources :

- 2020 Federal Census (Census)
- 2015-2019 American Community Survey (ACS)
- 2015-2019 Comprehensive Housing Affordability Strategy (CHAS) Data
- Massachusetts Association of Realtors
- Metropolitan Area Planning Council (MAPC) Demographic Profiles
- Zillow, Zillow.com
- The Donahue Institute at University of Massachusetts

Key to Abbreviations:

- AMI: Area Median Income set by the Federal Department of Housing and Urban Development
- DHCD: MA Department of Housing and Community Development
- SHI: MA Subsidized Housing Inventory

## Interagency Policy

### INTERAGENCY AGREEMENT

#### Regarding Housing Opportunities for Families with Children

This Interagency Agreement (this "Agreement") is entered into as of the 17th day of January, 2014 by and between the Commonwealth of Massachusetts, acting by and through its Department of Housing and Community Development ("DHCD"), the Massachusetts Housing Partnership Fund Board ("MHP"), the Massachusetts Housing Finance Agency (in its own right and in its capacity as Project Administrator designated by DHCD under the Guidelines for Housing Programs in Which Funding is Provided By Other Than a State Agency, "MassHousing"), the Massachusetts Development Finance Agency ("MassDevelopment") and the Community Economic Development Assistance Corporation ("CEDAC"). DHCD, MHP, MassHousing, MassDevelopment and CEDAC are each referred to herein as a "State Housing Agency" and collectively as the "State Housing Agencies".

#### Background

A. DHCD's 2013 Analysis of Impediments to Fair Housing Choice ("AI") includes action steps to improve housing opportunities for families, including families with children, the latter being a protected class pursuant to fair housing laws, including the federal Fair Housing Act, as amended (42 U.S.C. §§ 3601 *et seq.*) and Massachusetts General Laws Chapter 151B. In order to respond to development patterns in the Commonwealth that disparately impact and limit housing options for families with children, such steps include requiring a diversity of bedroom sizes in Affordable Production Developments that are not age-restricted and that are funded, assisted or approved by the State Housing Agencies to ensure that families with children are adequately served.

B. The State Housing Agencies have agreed to conduct their activities in accordance with the action steps set forth in the AI.

C. This Agreement sets forth certain agreements and commitments among the State Housing Agencies with respect to this effort.

#### Definitions

- 1) "Affordable" - For the purposes of this Agreement, the term "Affordable" shall mean that the development will have units that meet the eligibility requirements for inclusion on the Subsidized Housing Inventory ("SHI").
- 2) "Production Development" - For purposes of this Agreement "Production Development" is defined as new construction or adaptive reuse of a non-residential building and shall include rehabilitation projects if the property has been vacant for two (2) or more years or if the property has been condemned or made uninhabitable by fire or other casualty.

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### Agreements

NOW, THEREFORE, DHCD, MHP, MassHousing, MassDevelopment and CEDAC agree as follows:

#### Bedroom Mix Policy

1) Consistent with the AI, it is the intention of the State Housing Agencies that at least ten percent (10%) of the units in Affordable Production Developments funded, assisted or approved by a State Housing Agency shall have three (3) or more bedrooms except as provided herein. To the extent practicable, the three bedroom or larger units shall be distributed proportionately among affordable and market rate units.

2) The Bedroom Mix Policy shall be applied by the State Housing Agency that imposes the affordability restriction that complies with the requirements of the SHI.

3) The Bedroom Mix Policy shall not apply to Affordable Production Developments for age-restricted housing, assisted living, supportive housing for individuals, single room occupancy or other developments in which the policy is not appropriate for the intended residents. In addition, the Bedroom Mix Policy shall not apply to a Production Development where such units:

- (i) are in a location where there is insufficient market demand for such units , as determined in the reasonable discretion of the applicable State Housing Agency; or
- (ii) will render a development infeasible, as determined in the reasonable discretion of the applicable State Housing Agency.

4) Additionally, a State Housing Agency shall have the discretion to waive this policy (a) for small projects that have less than ten (10) units and (b) in limited instances when, in the applicable State Housing Agency's judgment, specific factors applicable to a project and considered in view of the regional need for family housing, make a waiver reasonable.

5) The Bedroom Mix Policy shall be applicable to all Production Developments provided a Subsidy as defined under 760 CMR 56.02 or otherwise subsidized, financed and/or overseen by a State Housing Agency under the M.G.L. Chapter 40B comprehensive permit rules for which a Chapter 40B Project Eligibility letter is issued on or after March 1, 2014. The policy shall be applicable to all other Affordable Production Developments funded, assisted, or approved by a State Housing Agency on or after May 1, 2014.



# 360-Degree Town Manager Evaluation

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FY 2023

**Date: January 24, 2023**

Anonymous Feedback from 7 Town Employees chosen by the Select Board.

Employees names will be referred to as "I-VII" in no particular order.

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## Town Manager's FY'2023 Goals

*Reviewer: Employee I*

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	<p>Since Fidel has been Town Manager, he has been exceptional in his efforts to earn the trust of staff and the community. For the first several months he made his office in the Berger Room at Town Hall. During this time, he always kept his door open, and this allowed staff, elected and appointed officials and the public the opportunity to interact with their new Town Manager. This also gave Fidel an initial feel for how Town Hall operates and how the workflow happens in the building. Fidel has come to the Fire Department on several different occasions for a meeting, to celebrate accomplishments, share a meal with Firefighters. Each time he comes to the fire station he takes the time to talk informally with the Firefighters. Fidel has an open engaging style, and he takes the time to get to know all employees. When Fidel talks to people it is evident that he is listening and engaged in the conversation.</p> <p>Fidel, routinely reaches out to see how things are going. He has been consistently supportive of the department heads and is always willing to listen to the department head, discuss a problem or issue and to understand the operations and discuss future opportunities for the department.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<u>Schools</u>	<u>Support School Department</u>	
<b>Schools Goal Comments:</b>	<p>I have witnessed at Department Head meetings and other events that Fidel has a great relationship with the Superintendent of Schools. It is evident that they communicate regularly, openly support each other and have formed a partnership. An example of this cooperation was the Town Meeting presentation on the need for renovation and or replacement of Killam School. Additionally, I have seen Fidel working with the Town Accountant to develop a funding source to enable free full day kindergarten. From my perspective, I can see this is an important goal he is working hard to achieve.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>Economic development is high priority for Fidel. He has done some restructuring of the Town's organizational structure and has moved the economic development coordinator's position to now report directly to him. This action not only highlights the importance of economic development to the Town Manager, but also will keep him directly involved and engaged in these efforts. Fidel has used the beer gardens to increase foot traffic and activities in the Downtown area. Because he attends these events it offers him an opportunity to speak with residents in an informal environment. He is also engaged creating opportunities for low income housing and has developed plans for using Town owned land on Oakland Avenue. It is clear that he is a compassionate person.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>Fidel has accomplished a great deal in this area. Some examples are: obtaining 4.1 million in grants to fund the Maillet, Sommes, Morgan Wetlands Area. This project when completed will reduce flooding down stream of this important resource area. The water tower project is underway. Once completed, this will allow the creation of a small neighborhood park. The downtown utility project is well underway. Locations for EV charger locations have been identified. The Public Health and Coalition space buildout at the Police Station is almost complete and once occupied they will provide an important and convenient opportunity for the public to seek services from these departments.</p>	

**Reviewer: Employee II**

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	Fidel has done a great job communicating his thoughts and ideas to staff and the community. His ability to execute and follow through on promises have led to a level of trust that the department heads have long enjoyed. Fidel maintains an open door policy and always has time to discuss issues and help to quickly resolve them. Many times over the past year I've been able to bounce thoughts and ideas off of him always receiving back excellent input. Stakeholders and citizens are a priority to him and everyone is heard.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	<p>In my position as Director of Facilities I report directly to the town Manager and a dotted line report to the Superintendent of Schools. The Facilities Dept. is responsible for maintaining all school and town buildings and the town manager is actively involved in supporting school side initiatives, maintaining a strong level of collaboration and trust. Fidel does not look at it as Town/School but looks at it as one Reading. This thought process helps to maintain strong ties between town and schools.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>As we all know the town is going through the process of siting a new senior center / community center. This process has led to exploring a number of options. During this process Fidel has led a number of meetings with stakeholders listening to individual needs of the groups and balancing desires vs. necessities. During this all parties are being heard and Fidel maintains excellent working relationships with all involved. This is not a particular goal listed in Fidel's goals but one that I have direct experience with. The process is still ongoing to cite the most viable location that meets all the needs of Reading residents. Throughout this whole process he has maintained full transparency and has been timely on deliverables.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>This next goal involves facilities in 3 areas. Sustainability, public health infrastructure and the 10 year capital plan.</p> <p>Sustainability- The Town of Reading just completed phase 2 of performance contracting. This project has been ongoing for the past 16 months and is reaching completion. Energy conservation measures have been implemented at all buildings. Fidel along with RMLD and Facilities are in the process of a potential phase 3 which will include solar initiatives for town and school buildings. Fidel has been very supportive of this next step and working towards Reading potentially becoming a member of Green Communities.</p> <p>Public Health Infrastructure- As part of the police station renovation work Public Health will be moving over to the newly renovated office space on the first floor. Fidel has been very mindful of staffing requirements for Public Health continuing to optimize space at town hall and at the police station.</p> <p>10 Year Capital Plan – The capital plan is a major component of the Facilities Dept. budget Fidel is very supportive of capital needs for both town and school buildings and asks well in advance of any upcoming needs or changes. He works very hard with all dept heads to make sure the needs are met and what is presented on the capital plan is an accurate indicator of cost and necessity.</p>	

**Reviewer: Employee III**

**Provide comments for each goal. (Refer to attachments)**



Area / Goal(s)	Description	Comments
<u>Community</u>	<u>Earning the Trust of Staff &amp; the Community</u>	
<b>Community Goal Comments:</b>	The Town Manager has worked extremely hard getting to know all staff and has been nothing but supportive. I see him at every community event and walking around town and will take the time to engage with the public at any point. He has earned people's trust.	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	I have first hand knowledge of the Town Manager working hand and hand with the schools and supporting their needs.	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	My staff has told me that he works hard in this area.	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	N/A	

Provide comments for each goal. (Refer to attachments)

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	I feel Fidel has done an outstanding job earning the trust of the staff and community. Fidel attends every event to engage with the community and learn about their concerns. On the staff side, he has shown himself to be flexible and open-minded, which goes a long way in building staff trust. My working relationship with him is going exceptionally well. He listens when I have concerns about issues and considers my thoughts when making decisions. He is always friendly and considerate. He wants to create positive change in the community and the Town work environment.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<u>Schools</u>	<u>Support School Department</u>	
<p><b>Schools Goal Comments:</b></p>	<p>Fidel has been very supportive of the school department. He is very committed to being part of the solution in funding full-day K. He proposed a late change to the gas budget for FY24 to further assist the school department in finding additional funding for full-day K.</p> <p>The Town and School department have always worked very well collaboratively. Fidel’s management style has continued to build on that collaboration to solve community issues. I am impressed with how quickly Fidel has built strong relationships with Town and School leaders and staff.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	Our Economic Development Director left in Oct/Nov. Fidel posted the position quickly and filled it in a timely fashion. Since the new Economic Development Director started, Fidel has spent a lot of time meeting with him to discuss strategies in this area. I am not actively involved in Economic Development, so I am not privy to all being worked on in this area.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>A fair amount of infrastructure work was ongoing when Fidel started, including emergency water infrastructure repairs on Walker’s Brook Drive. Fidel worked very hard to get grants to help with some of the projects we had planned. In addition, the Killam School was approved to move forward by the MSBA. Fidel worked collaboratively with the Town and School staff to prepare for the Town Meeting vote, including building tours and public meetings relative to the project.</p> <p>A lot of work is currently planned for the upcoming years, and much of it was sped up by all the grant funding Fidel brought in. It truly is remarkable to see the grant funding he was able to get within his first year. I am anxious to see what the next year brings.</p>	



Reviewer: Employee V

Provide comments for each goal. (Refer to attachments)

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	Fidel has done an excellent job reaching out to staff and the community at large. He set up one-on-one meetings with many staff members and community leaders to introduce himself, understand their jobs and become aware of any issues that they might have. He excels at relationship building and communication. The time he invests in these activities helps to earn the trust of these individuals.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	<p>As a Town Department Head, I am not privy to the innerworkings of the Town Manager and School Department, but the Manager and School Superintendent seem to work very well together from what I have observed. I know that the Town Manager has been very involved with the effort to construct a new Killam Elementary School, and he was instrumental in obtaining the first level of approvals from the MSBA.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>Fidel has a passion for Economic Development. He excels at building relationships with existing businesses and has put in great effort to bring new businesses to Reading. He works well with the Chamber of Commerce and the BID Steering Committee and has been able to secure several state and federal grants during his first year in town. When the Economic Development Director left, Fidel quickly replaced her with an experienced candidate who hit the ground running. The fact that he moved fast to replace this important position shows how much he values Economic Development. I expect this will remain a top priority for Fidel in the years to come.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	Fidel has secured many infrastructure grants for projects such as Safe Routs to School and expanding the Municipal Fiber Network. He realizes the value of sound infrastructure and has taken steps to ensure that Reading keeps up with its structural needs. He has also been very active in the quest for a new or improved Senior or Active Living Center, leading the community discussion and working with stakeholders to ensure that Reading gets a Center that meets its needs.	

**Reviewer: Employee VI**

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	Fidel is everywhere! His visibility has gone a long way in building trust in the community. Also, when he is out in the community, he is present. He takes time to listen, learn people and their names, and build genuine connections. He has earned the trust and credibility of our town leaders through constantly being prepared, competent on key issues, and able to express a clear vision for the future.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<u>Schools</u>	<u>Support School Department</u>	
<p><b>Schools Goal Comments:</b></p>	<p>Fidel is on track with all of the goal areas for the schools. He has been a true champion for our schools and incredible thought-partner and collaborator to me as the Superintendent. Below are some comments on his specific goals:</p> <ul style="list-style-type: none"> <li>• <i>Support School Department Initiatives. Participate in Sporting Events, Celebrations, and Classrooms:</i> Fidel is constantly at school events – from games, to shows, to our schools. He is always eager to be around our students, staff, and families. He has quickly gained the respect and appreciation of our RPS staff.</li> <li>• <i>Continue Excellent Relationship with Superintendent and other School Staff.:</i> I couldn't think of a Town Manager who could be more committed to the schools. We have maintained an excellent relationship and communicate almost daily.</li> <li>• <i>Work Together to Complete MSBA Eligibility Period for Killam School.:</i> While this has been a total team effort from many in the Town, Fidel's leadership in this area has been instrumental in moving the project forward. A unanimous Town Meeting vote of approval for the \$2.2 million in design funding reflects some of his leadership in this area. Throughout this process, he has been on top of deadlines and collaborative around each piece of work required for the project.</li> <li>• <i>Collaborate on Developing a Sustainable and Balanced Plan to Achieve Free Full Day Kindergarten.:</i> In the past two years, the Kindergarten tuition has dropped from \$4,500 in FY22, to \$3,600 in FY23, to (tentatively) \$2,650 in FY24. Fidel's leadership in helping map out a vision to moving this forward, with investments and contributions from both the Town and schools, has been invaluable. We are confident that we will be able to reach a sustainable and balanced plan to achieve free full day kindergarten within the next few years.</li> </ul>	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	NA	

*Provide comments for each goal. (Refer to attachments)*

Area / Goal(s)	Description	Comments
<u>Infrastructure</u>	<u>Infrastructure Work in Reading</u>	
Infrastructure Goal Comments:	NA	



**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	<p>Successes: Fidel is visible and accessible, and brings positive energy, confidence, and authentic curiosity to relationship building.</p> <ul style="list-style-type: none"> <li>• Connected with people from a wide variety of community groups, residents, and staff (e.g. beer gardens, town sponsored events)</li> <li>• Launched the newsletter and updated website</li> <li>• Supported public safety and the new DESJ (e.g. Reading Reflect, Community Compact Grant)</li> <li>• Finalized personnel policies and implemented pay &amp; class study results</li> </ul> <p>Challenges and Opportunities: Earning trust is an incremental process and takes time. Inertia in government is difficult to overcome. Change is hard in every work environment and community.</p> <ul style="list-style-type: none"> <li>• Natural or expected attrition</li> <li>• Difficult hiring market</li> <li>• Having to building the foundation for consensus building</li> </ul>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	<p>Successes: Fidel is visible and accessible, and brings positive energy, confidence, and authentic curiosity to relationship building.</p> <ul style="list-style-type: none"> <li>• Strong and collaborative relationship with the Superintendent, particularly with budget and consulting on sensitive issues</li> <li>• Persistence and determination in moving the Killam School project forward</li> <li>• Participation in RPS events and activities</li> </ul> <p>Challenges: RPS is a complex system new leadership and with its own governance board.</p> <ul style="list-style-type: none"> <li>• Co-learning with new leadership</li> <li>• Funding construction and large educational initiatives in an economically conservative community</li> </ul> <p>Fidel has laid the groundwork for a positive Town Manager and Superintendent (RPS) relationship. There is collaboration and not competition.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>Successes: There are EIGHT objectives linked to this goal and almost all are long-term process/progress oriented. Overall, Fidel has demonstrated support and built business and community relationships around this goal.</p> <ul style="list-style-type: none"> <li>• Haven Street Pocket Park</li> <li>• Shepherded zoning and parking issues through Town Meeting</li> <li>• Engaged in public discussion of Oakland Road; formed Symonds Way committee</li> <li>• Organizing and attending community events that support small and local businesses</li> </ul> <p>Challenges: No objective for this goal can be achieved by a single individual or within one year!</p> <ul style="list-style-type: none"> <li>• Fidel will need to continue to build trust with stakeholders (elected volunteers, town staff, community members, businesses) <ul style="list-style-type: none"> <li>○ Listening</li> <li>○ Consensus Building</li> </ul> </li> <li>• Continue to revise/adapt vision and expectations at the individual and community level. <ul style="list-style-type: none"> <li>○ Self-practice</li> <li>○ Model and encourage this in employee leadership and with community leaders</li> </ul> </li> </ul>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>There are nine (9) objectives for this goal. All play to Fidel's strengths in planning and implementing systems.</p> <p>Successes: Standout successes in this goal are in funding and facilitating progress/completion on large scale projects</p> <ul style="list-style-type: none"> <li>• Grants, Earmarks, and strategic AARPA recommendations (Support for RAAC)</li> <li>• Establishing Public Health Department</li> <li>• Utility improvements and water tank</li> </ul> <p>Challenges: ReCalc and Climate Law initiatives require intense collaboration, negotiation, and communication.</p> <ul style="list-style-type: none"> <li>• Buy in for Community Center</li> <li>• Buy in, change management, and education around Climate Law initiatives.</li> </ul>	

## Town Manager's Performance Rating for Standard I: Leadership and Professional Culture

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
<b>I-A. Leadership: Demonstrates strong leadership practices in the exercise of executive functions and personnel management.</b>	I, II, III, IV, V, VI	VII			
<b>I-B. Communication: Demonstrates strong interpersonal, written, and verbal communication skills.</b>	I, III, V, VI	II, IV, VII			
<b>I-C. Commitment to High Standards: Fosters a shared commitment to high standards of public service delivery by staff, professional interaction with the public, and professional development, with high expectations for achievement for all.</b>	I, II, III, IV, V, VI, VII				
<b>I-D. Assessment: Ensures that all department and division heads use a variety of formal and informal methods and assessments to measure employee growth and understanding and make necessary adjustments to their practice when employees are not performing.</b>	II, III, V, VI	I, VII	IV		
<b>I-E. Evaluation: Ensures effective and timely supervision and evaluation of all staff in alignment with town policies, state regulations and contract provisions.</b>	II, III, V, VI, VII	I	IV		
<b>I-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout all Town departments.</b>	I, II, III, VI, VII	IV, V			

<b>Overall Rating for Standard I</b> (Circle one.)	<b>The Town Manager demonstrates strong leadership and promotes a strong professional culture.</b>
-------------------------------------------------------	----------------------------------------------------------------------------------------------------

1 (I, VI, VII)

2

3

4

5

**Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):**

I - Fidel consistently demonstrates a high level of leadership. If there is an issue, he offers advice and also offers to meet and discuss the issue with the employee. He communicates throughout the organization well and encourages high standards of performance.

III - Fidel came in here full of energy, his energy level is infectious and his work ethic, supervisory skills, personality have shown through. He listens to our needs and constantly communicates with us all. He makes himself available at all times to meet and is prompt to respond.

V - **Rating is a 1.** Fidel is a strong leader and a hard worker. He leads by example.

VI - Fidel demonstrates strong leadership by "walking the walk." He is a humble leader that is visible, positive, and solutions orientated. He is a great listener and extremely skilled at building consensus on complex issues. He holds himself to an extremely high bar and is deeply reflective of his own practice. On many occasions, we have debriefed leadership challenges we have faced and I am always impressed and inspired by how he reflects on his own leadership and understands the deep nuance and complexity around a variety of issues. He communicates well in writing and verbally, and I am especially appreciative of how proactive he is in his communication. I have also seen him manage some really difficult and stressful conflicts with empathy, clarity, and positive resolution. He has been an incredible leader for our community and has helped to set and foster a town culture of professionalism and collaboration.

VII - The first-year challenge for any new leader is to set the tone and expectations of “new” vs “old” ways of doing things. There is a natural tension between setting an inspirational/aspirational culture and managing/implementing change (buy-in).

Fidel is a dynamo and sets a standard of excellence and positive energy. He has set the tone and expectations and is in front leading the charge for an inspirational/aspirational culture with vision and creative ideas. His biggest challenge going forward is to practice leadership, communication, and assessment (I-A, I-B, I-D) that empowers stakeholders and employees to catch up! Leadership in this position requires quick transitions between leading from the front to leading from behind.

## Town Manager's Performance Rating for Standard II: Management and Operations

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
 Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
<b>II-A. Environment: Develops and executes effective plans, procedures, routines, and operational systems to address a full range of financial, safety, health, and social needs.</b>	III, V, VI, VII	I, II	IV		
<b>II-B. Human Resources Management and Development: Implements a cohesive approach to recruiting, hiring, development, and career growth that promotes high-quality and effective organization.</b>	I, II, III, V, VI	IV, VII			
<b>II-C. Scheduling and Management Information Systems: Uses appropriate systems to ensure optimal use of data and time for staff productivity and collaboration, while minimizing staff disruption and distraction.</b>	I, II, III, VI, VII	V	IV		
<b>II-D. Law, Ethics, and Policies: Understands and complies with state and federal laws and mandates, Select Board policies, collective bargaining agreements, and ethical guidelines.</b>	I, II, III, V, VI, VII		IV		
<b>II-E. Fiscal Systems: Develops a budget that supports the Town's vision, mission, and goals; allocates and manages expenditures to balance goals vs. available resources.</b>	I, III, IV, V, VI, VII	II			

<b>Overall Rating for Standard II</b> <i>(Circle one.)</i>	<b>The Town Manager uses resources to implement appropriate staff operations and facility management.</b>
---------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------

1 (I, VI, VII)

2

3

4

5

**Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):**

I - Fidel is committed to recruiting, hiring and supporting employees that will provide high levels of performance. He does business in an ethical way and adheres to all policies. He is currently working on a sound fiscal budget that supports the Town's stated vision.

III - His financial understanding is top notch, he works hard to ensure that we as staff have what we need. Encourages outside the box thinking on hiring, recruiting and retention.

V - **Rating is a 1.** Fidel runs the operation well. He always has been eye on budget, ethics, and employee satisfaction. He is a big believer in training and development and took the Department Heads and Assistants to a daylong learning retreat focusing on dealing with stress and preventing burnout.

VI - Fidel is skilled at synthesizing the needs (often competing needs) of a variety of stakeholders and working towards positive resolutions. He has effectively managed his team and smoothly navigated many of the challenges thrown at a first year leader during a period of transition. I feel that his approach to budgeting has been extremely collaborative and as a result, the FY24 budget includes many exciting investments that represent the values and priorities of our community.

VII - Management and operations are Fidel's strength. He understands systems are integrated and collaborative. He consistently shows great depth of knowledge and complex strategy thinking when problem-solving infrastructure issues.

He brings these skills to human resource management. With personnel issues, he has positive personal philosophy of starting with examining the processes (is the problem how the employee is able to perform their duties) and management ("is it me?", management style, etc) before focusing on the employee.

Fidel is still assessing and developing the work culture for employees which impacts recruiting, hiring and retention. I hope to see more commitment to incorporating DEIA practices into the workplace culture.



## Town Manager's Performance Rating for Standard III: Community Engagement

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
III-A. Sharing Responsibility: Collaborates with citizens and community stakeholders to formulate and support the Town's goals.	I, II, III, IV, V, VI	VII			
III-B. Communication: Engages in regular, two-way, proficient communication with citizens and community stakeholders about Town government performance.	I, III, IV, V, VI	II, VII			
III-C. Community Concerns: Addresses community problems and concerns in an equitable, effective, and efficient manner.	I, II, III, IV, V, VI, VII				

**Overall Rating for Standard III**  
(Circle one.)

The Town Manager forms effective partnerships among town employees, citizens, community organizations, and other stakeholders that address citizen concerns and build support for the mission of Town.

1 (I, VI)

2 (VII)

3

4

5

### Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):

I - Fidel has a unique ability to form relationships with people and this allows him to get honest feedback. Fidel addresses community concerns quickly and effectively. A good example is how he responded to the issue of trash pickup. He quickly identified the Town's legal rights, worked with the vendor and also identified another vendor to assist and if necessary, take over. This major issue was solved quickly and efficiently in a relatively short period of time.

III - Just look at his calendar. He meets with people, groups, organizations, anyone that needs to or wants to meet with him so he can help support their needs. He engages in 2 way communication at all times and addresses needs promptly.

V - Rating is a 1. This is one of Fidel's strengths. He is a relationship builder. He spends many hours working to form partnerships and addressing concerns.

VI - He responds to issues quicker than most leaders I have been around. More importantly, when he addresses issues, he is consistent, fair, and thoughtful. I have seen him collaborate effectively with a wide variety of community stakeholders, including citizens, teachers, staff, students, etc. He has utilized the Town Manager minute, the updated website, and social media to consistently update the community on happening across the town.

VII - Fidel has the energy to take on everything and be everywhere, while also making time for his family. Sharing responsibility comes with those quick transitions between leading from in front (heroic leader / visionary) to leading from behind (inspiring, empowering, setting boundaries), but also relies on citizens, community stakeholders, and employees having clearly agreed upon goals. Fidel has strong communication skills (well beyond proficient), especially in two-way situations. With his newsletter and management by walking around he is working hard on networking communications (dissemination) which can be challenging in today's world of information overload.

General/Overall Comments/Feedback:

I - We are fortunate to have Fidel for a Town Manager. He has had challenges and he has shown he can meet these challenges. By all measures he has had a strong first year and has a bright future.

II - I look forward to working with Fidel many years into the future. We have many projects on the horizon and I look forward to working with him.

III - Reading has struck gold here, a Town Manager who is full of energy, wonderful ideas and very supportive of both staff and citizens. He truly cares about the town, its residents, and staff. Do what is needed to keep him here. You don't get a leader like this every day.

IV - Fidel has transitioned well into his role as Town Manager. His leadership style is well matched with Reading. He has built strong relationships with the Town and School management teams as well as with the staff. He showed the staff through the results of the Pay and Class study that he valued their service and wanted to do everything he could to bring wages into the 75th percentile. I strongly believe we will have an easier time retaining staff with the new non-union pay scale and we will be in a competitive pay range when positions are open. I think Fidel has done a great job in his first year and I am looking forward to working with him for the long-term.

V - Fidel is off to a great start in Reading. He is a hard worker that always finds time for staff, residents, and Boards. He has led us through two successful town meetings and has almost completed his first full budget process. He has also secured several grants and earmarks that help with our financial situation. He led several community events such as the Beer Gardens, and "Lunch N Learns" for seniors. The future of Reading is very bright with Fidel in charge.

VI - Fidel has been a total rockstar in year 1. I deeply respect him as a leader and seek to emulate his ability to build positive relationships, his skill in navigating complex situations, and his ability to solve problems and make positive change. While he is an extremely savvy politician, he is equally as great of a leader and human.

VII - I have confidence in Fidel's abilities as Town Manager. He is open and listens, and is respectful when he disagrees. He demonstrates a balance of patience (hearing things out) and action ("getting to yes" and moving on).

Interdepartmental communication and participation has increased since Fidel started. Department/Assistant Department Heads are at more events and staff are connecting at different levels as well. I have had more communications with non DH/ADH employees in the last year than ever before all proactive and collaborative.

# Town Manager Evaluation

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FY 2023

Combined Reports from Select Board Members:

Mark Dockser, Chair

Karen Herrick, Vice Chair

Christopher Haley, Secretary

Carlo Bacci, Member

Jacqueline McCarthy, Member

**Date: January 24, 2023**

# Town Manager's FY'2023 Goals

**Reviewer: Mark Dockser**

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	<p>Fidel has done an excellent job of immersing himself in the community, available to all at all times of day and night (day preferred of course). This was exactly the right way to enter the community and to keep it up throughout the year and beyond.</p> <p>Fidel has also been available to work with staff. His style is different and more active compared to the previous administration and it has taken some time for staff members to adjust. This has also resulted in some staff turnover and replacement with a new, less experienced and more aggressive team. This transition should provide for expansion of enthusiasm and opportunity for all team members. I look forward to watching this play out.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	Fidel has forged a strong relationship with the new superintendent. I see 2 key community priorities going forward: the Killam Project AND the Senior Center Project. Fidel has worked very well with Tom M. through my observations, promoting the needs of the community on both of these priorities. His involvement with the SBAB and in supporting the schools has been spot on.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>Fidel has shown great acumen in understanding the resident’s desires, the business communities needs and the opportunity to support both. His support of the BID, exploration of downtown real estate, and meeting with the key downtown and peripheral area businesses has allowed for support.</p> <p>Hiring a new economic development director with a desire to support and grow meets the board’s desires in helping local businesses thrive.</p> <p>Applying for and obtaining grants has proven the opportunity to add funds to understand the needs and provide more opportunities for local businesses.</p> <p>2023 should offer chances for existing business growth and for expansion in downtown and beyond. Restructuring the economic development director to report directly to the town manager I think highlights the importance of this area.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>Having the experience as Director of DPW in Chelsea has provided strong understanding of infrastructure and the ability to further support Jane and Chris and the full DPW team.</p> <p>Fidel supported getting ARPA funds to supplement water capital. With our old pipes and the recent breaks by Walkers Brook, he is keenly aware of our needs and the importance of scheduling updating/upgrading work. He is also on top of the MWRA issues to help find any new opportunities for support.</p> <p>The quantity of work in town has proven to be a bit more challenging than anticipated. Better and earlier communication is important and needed.</p> <p>Grant applications have been encouraged and we have been successful with many. This is great and should continue.</p> <p>I would like to see more and earlier public communications and meetings to allow for feedback about neighborhood needs to be heard. A good example of this took place with the Oakland Road area and exploration of an affordable housing development. A not as good example was with the grant proposal for sidewalks in the RMHS area.</p>	

**Reviewer: Karen Herrick**

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	Mr Maltez has been a very visible and accessible presence in Reading since day 1. He is respectful of staff and community members in written and verbal communications. He has earned the trust of community members in many ways. Three examples. Delivering a plan and acquiring grant funding for safety improvements raised by residents in early Oakland Road discussions. Immediately responding to Auburn St neighbors who unexpectedly received word of a blasting proposal. (An alternative approach was implemented. Communication to the neighbors was prompt.) His proactive, prompt and effective response to the failure of Republic last fall. Key in all of this was frequent communication. Of note, the Town Facebook page has become a more active channel of community communication. The reverse 911 system is appropriately used along with email, and text. Overall - municipal communication has increased in quality and quantity.	



**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<u>Schools</u>	<u>Support School Department</u>	
<p><b>Schools Goal Comments:</b></p>	<p>Mr Maltez has developed a productive working relationship with the Superintendent and School Committee and District administration. He has shown the leadership needed since the Killam School MSBA acceptance was announced and was instrumental creating /facilitating the Killam School Building Committee. Notable results of this visible and behind the scenes support was approval by Town Meeting of the Design &amp; Feasibility allocation and the continued advancement of Reading in the MSBA process. Mr Maltez has attended numerous school events and has been very collaborative with School Administration to advance community desired school goals such as free full day kindergarten and a new \$2M reading program founded by Select Board allocated ARPA funds.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>Mr Maltez has met and communicated with many business and property owners on a on-going basis. He has effectively facilitated RFP's and communications for a search for a new Senior Center. He actively supported and participated in the workshop with RMLD to understand current campus usage and possibilities fro the Eastern Gateway. Outreach to the Chamber exec director has been frequent and productive. 4 new downtown events and the return of the Fall Street Faire were successfully executed. Haven Street Pocket park was well executed . Camp Curtis Guild opportunity and assessment of the parcel was clarified and presented to SB. Town was reclassified from a bus community to a commuter rail community pursuant to completion of Housing Production Plan and required steps for MBTA communities. Attended and supported Porchfest and the Art Walk program. In general, Mr Maltez has made excellent progress on the Economic Development goals. 5</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal</b> <b>Comments:</b>	<p>Mr Maltez has been overseeing the water tank installation and MANY downtown water, sewer and gas line projects which will benefit residents and businesses. He and staff responded promptly to the water/sewer failure of aging pipes on Walker's Brook Dr. The Maillet Soames Morgan project funding and coordination has been a significant accomplishment resulting in \$3.5m in state and federal grants for Reading. He presented effective funding solutions to the Select Board for the use of water/sewer reserves and is applying for additional grants to offset the enormous cost of upgrading aging water/sewer infrastructure. Excellent support and facilitation of the Select Board RAAC committee and the Select Board's responsibility and goal to allocate \$7.6M in ARPA funds in a timely manner with guidance from community wide public input process. Effective support of ReCalc and Birch Meadow Master plan as well as initial design and public conversation about potential affordable housing units on Town owned land.</p>	

**Reviewer: Christopher Haley**

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	I can't speak to the staff portion, which will be on the 360 review, but Fidel has spent a significant time out in the community getting to know anyone and everyone.	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	
<b>Schools Goal Comments:</b>	Fidel has a great relationship with Dr. Milaschewski and has been actively involved in Killam and Full Day K; both of which are extremely significant.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	I can attest to Fidel's commitment to Oakland Rd as he walked the neighborhood passing out flyers with Jackie and myself. Symonds Way is a work in progress as is the Eastern Gateway, but both are currently underway in terms of next steps. There needs to be significant work on economic development downtown as more businesses are leaving and some storefronts have been vacant for far too long.	

**Provide comments for each goal. (Refer to attachments)**

<b>Area / Goal(s)</b>	<b>Description</b>	<b>Comments</b>
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	This is one of Fidel's stronger areas of expertise. Almost every item listed he's played a significant role in.	

Provide comments for each goal. (Refer to attachments)

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	Fidel hit the ground running and has been able to respond and initiate some community goals. There has been some staff turnover in the past year and it seems so far that staff in on a good footing. Fidel has done a lot of outreach to businesses and community members. Fidel does not mind working long hours to get the job done and take care of resident and staff concerns
<b>Community Goal Comments:</b>	Fidel has 2 town meetings under his belt and is getting more comfortable. Talking about the Oakland Rd and Symonds way properties to benefit the whole community is a positive step forward. Initiating community feedback from residents allows them to feel involved and that their thought matter. Fidel is constantly reaching out to us individually to get our feedback and to get a pulse of what's going on in certain neighborhoods. As a board and with Fidel's guidance, we are trying to move projects forward that were not put forward during the pandemic.	



**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Schools</u></b>	<b><u>Support School Department</u></b>	Fidel and the Superintendent seem to have a good working relationship and a common understanding to move Reading forward.
<b>Schools Goal Comments:</b>	The ARPA committee was a good example of the town and schools working together. A request was made to purchase curriculum to help students that have fallen behind and help other students catch up to their grade level. The support was there from Fidel and town staff. The measure and purchase of that curriculum was approved overwhelmingly at town meeting. The Killam project is moving along. A Killam School Building committee was formed and is working with the Permanent Building committee to get this project to the next phase.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	Economic development is an ongoing endeavor. Keeping the board informed about certain projects is critical for Reading to thrive. Fidel took the lead on 3 successful Beer Gardens on the common along with town staff.
<b>Economic Development Goal Comments:</b>	We have a recent new hire for the Economic Dev. Director. Benjamin was hired after Erin Schafer gave her notice. The position was advertised with over 50 applicants. I like the idea that Fidel understands we need to do more community events on the common and other parts of town. Parking and parking management is key to economic development, New parking restrictions were put into place along with a full time parking enforcement officer. The new parking kiosks should be installed in spring/summer and hopefully will help with parking management. Looking for opportunities to highlight Reading seems to be a goal and we need to fully support that as a board.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	Auburn St water tank is moving along and the Malliet Sommes grant was granted. Water lines are being replaced in downtown along with National Grid work. We have a positive response from cell carriers to go on the new water tower and Verizon is also requesting another site to improve reception.
<b>Infrastructure Goal Comments:</b>	<p>The recent Holiday season did not go well for many downtown businesses. There was very little or no communication to all the ongoing work with road closures that cost businesses a great deal of money. There was a complete breakdown and lack of respect for the downtown businesses that were looking forward to a prosperous season after 2 covid holiday seasons.</p> <p>Putting this “epic failure” aside, Fidel understands that our water and sewer infrastructure needs a lot of work and lobbied hard for ARPA money. We have to maintain our roads and buildings, but do a better job of planning and executing.</p>	

Provide comments for each goal. (Refer to attachments)

Area / Goal(s)	Description	Comments
<b><u>Community</u></b>	<b><u>Earning the Trust of Staff &amp; the Community</u></b>	
<b>Community Goal Comments:</b>	The Town Common's usage for new (beer garden) and existing (holiday celebrations, Winterfest, Fall Street Faire) community events was exceptional. Staff completed the pay-in-class study efficiently and on time, offering plain English recommendations to the Select Board. The town's social media presence and reach have improved dramatically. I look forward to continued focus on improving communications regarding town projects that impact neighborhoods. Additionally, I hope the onboarding of new senior staff is accompanied by efforts to develop and retain talent in a highly-competitive market.	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<u>Schools</u>	<u>Support School Department</u>	
<b>Schools Goal Comments:</b>	<p>Effective communication and consensus-building led to Town Meeting's vote in favor of proceeding with MSBA-required local investment for the Killam School replacement. This included numerous opportunities for residents to understand need and context. Additionally, the town's first and largest ARPA grant (for district-wide literacy training to address COVID-era learning loss) achieved strong consensus and resulted in responsive timing for this critical resource. I look forward to seeing more communication on the financial path toward full-day kindergarten, as families across town need this info as they plan their own household budgets.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Economic Development</u></b>	<b><u>Economic Development Work in Reading</u></b>	
<b>Economic Development Goal Comments:</b>	<p>I appreciate town staff's efforts to increase downtown visibility and vibrancy during a time of competing infrastructure/utility needs and labor/supply challenges. The town proceeded with downtown parking policy changes that will result in changes for both residents and businesses, so we should devote time and focus in 2023 to hearing about how it's going and how we can improve. I also hope that new senior staff in economic development and planning are supported as they take on their important new roles. Finally, I hope we can do our part to ensure policies to address the statewide housing supply crisis and leverage the state's MBTA Communities requirements toward the right balance of density and preservation.</p>	

**Provide comments for each goal. (Refer to attachments)**

Area / Goal(s)	Description	Comments
<b><u>Infrastructure</u></b>	<b><u>Infrastructure Work in Reading</u></b>	
<b>Infrastructure Goal Comments:</b>	<p>The town devoted a significant portion of its ARPA funding to infrastructure across departments and achieved some big successes with grant awards (e.g., Maillet-Sommes-Morgan, Safe Routes to School, records digitization). Infrastructure repairs (downtown utility, Auburn Street water tank, recreation) and climate change responses continue at an active pace. I hope to get more insights from town staff/counsel on the state’s climate law and its consequences/requirements for the town. We should also devote some time to discussing a capital improvement plan that incorporates impacts of significant potential projects like new/updated town space for older residents and the Killam School replacement.</p>	

## Town Manager's Performance Rating for Standard I: Leadership and Professional Culture

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
<b>I-A. Leadership: Demonstrates strong leadership practices in the exercise of executive functions and personnel management.</b>	MD, KH, CH	MD, CB, JM			
<b>I-B. Communication: Demonstrates strong interpersonal, written, and verbal communication skills.</b>	MD, KH, CH, JM	CB			
<b>I-C. Commitment to High Standards: Fosters a shared commitment to high standards of public service delivery by staff, professional interaction with the public, and professional development, with high expectations for achievement for all.</b>	MD, KH, CH, CB, JM				
<b>I-D. Assessment: Ensures that all department and division heads use a variety of formal and informal methods and assessments to measure employee growth and understanding and make necessary adjustments to their practice when employees are not performing.</b>	MD, CH, JM	KH, CB			
<b>I-E. Evaluation: Ensures effective and timely supervision and evaluation of all staff in alignment with town policies, state regulations and contract provisions.</b>	MD, KH, CH, CB	JM			
<b>I-F. Managing Conflict: Employs strategies for responding to disagreement and dissent, constructively resolving conflict and building consensus throughout all Town departments.</b>	MD, KH, CH	MD, CB, JM			

<b>Overall Rating for Standard I</b> (Circle one.)	<b>The Town Manager demonstrates strong leadership and promotes a strong professional culture.</b>
-------------------------------------------------------	----------------------------------------------------------------------------------------------------

1 (MD, CH)

2 (CB, JM)

3

4

5

**Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):**

MD - Fidel has brought an aggressive attitude to move the town ahead. He is both a manager and a doer, leading by example. His standards are high and he seems to be bringing this attitude to the team along with the ability for them to grow.

I think staff is still getting used to some of the changes in style that Fidel brings and I encourage working to assist this as noted in my final comments. That said, I look forward to watching and supporting the staff to make things happen.

KH - 1 - Mr. Maltez has demonstrated "first seek to understand" upon taking the lead in Reading. The transition was smooth and Annual Town Meeting was successfully executed. A change in long time leadership is always stressful for an organization. Mr. Maltez has demonstrated a great ability to listen, to mediate conflict and to creatively devise solutions. The environment at Town Hall has been positive. Department heads and all staff members have risen to the challenge and contributed to a successful transition. Mr Maltez has proactively invited the Select Board to attend staff events and further develop lines of communication



with staff as appropriate. As a Select Board member, I have not had much exposure to staff assessments - but Mr Maltez has on numerous occasions addressed performance concerns and I have seen visible improvements in key areas. When hiccups do occur - he is responsive to Select Board requests for effect remediation.

CB - Despite some recent turnover, town hall seems to be running smoothly. Some staff does not like change and that is normal. I believe that Fidel is determined to get things done in a timely manner and not to waste time. I have spoken to some staff casually to see how the transition was going early on and there were no complaints. The pay in class study was brought forward and showed us how we are behind as a town. Payroll was adjusted to make us comparable to similar communities. We have received many grants this past year and more continue to come in.

# Town Manager's Performance Rating for Standard II: Management and Operations

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
<b>II-A. Environment: Develops and executes effective plans, procedures, routines, and operational systems to address a full range of financial, safety, health, and social needs.</b>	MD, CH	KH, CB, JM			
<b>II-B. Human Resources Management and Development: Implements a cohesive approach to recruiting, hiring, development, and career growth that promotes high-quality and effective organization.</b>	MD, KH, CH, JM	MD, CB			
<b>II-C. Scheduling and Management Information Systems: Uses appropriate systems to ensure optimal use of data and time for staff productivity and collaboration, while minimizing staff disruption and distraction.</b>	MD, CH, JM	KH, CB			
<b>II-D. Law, Ethics, and Policies: Understands and complies with state and federal laws and mandates, Select Board policies, collective bargaining agreements, and ethical guidelines.</b>	MD, KH, JM	CH, CB			
<b>II-E. Fiscal Systems: Develops a budget that supports the Town's vision, mission, and goals; allocates and manages expenditures to balance goals vs. available resources.</b>	MD, KH, CH, JM	CB			

<b>Overall Rating for Standard II</b> <i>(Circle one.)</i>	<b>The Town Manager uses resources to implement appropriate staff operations and facility management.</b>
---------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------

1 (MD, CH, JM)

2 (CB)

3

4

5

**Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):**

MD - Fidel brings a new, more aggressive style to town government. I think it is refreshing and a great opportunity. New, less experienced town staff will need strong support in order to succeed. I would like to see support systems, training and support from the Town Manager and Assistant Town Manager to make this approach pay off.

KH - 1 - Excellent performance in this area. The Select Board does not have clear visibility on the appropriateness and adequacy of II-A and II-C and year 1 was generally continued execution of legacy programs and systems. Staff overall is incredibly reliable and well prepared which suggest that current Systems and the Environment are working. Meetings are hybrid and/or frequently available via RCTV Youtube. The operations have scaled to accommodate several new committees. Staff members have expressed concern regarding lack of paid parental leave. Posting and hiring for open positions has improved. The number of applicants has risen and the hiring window has shortened. In DPW especially, the number of open positions has been significantly reduced. Reading has also seen a significant increase in the diversity of staff hiring which is to be commended and has been a significant community and Select Board goal.

CB - No of us are in town hall on a daily basis. I hope that staff would reach out to us if there were any problems that needed to be addressed. After 2 years and 9 months on this board and countless meetings, it is my observation that as a whole, the town is running smoothly, due to Fidel and our Dept. heads. There seems to be a good structure in place to address issues that arise and dealing with them. I have already shared my frustration with the weeks before the Holidays regarding construction in downtown.

## Town Manager's Performance Rating for Standard III: Community Engagement

Ratings are from 1 (Exemplary) to 5 (Unsatisfactory).  
Check one box for each indicator and circle the overall standard rating.

	1	2	3	4	5
III-A. Sharing Responsibility: Collaborates with citizens and community stakeholders to formulate and support the Town's goals.	MD, KH, CH, CB, JM				
III-B. Communication: Engages in regular, two-way, proficient communication with citizens and community stakeholders about Town government performance.	MD, KH	CH, CB, JM			
III-C. Community Concerns: Addresses community problems and concerns in an equitable, effective, and efficient manner.	MD, KH, CH, JM	MD, CB			

**Overall Rating for Standard III**  
(Circle one.)

The Town Manager forms effective partnerships among town employees, citizens, community organizations, and other stakeholders that address citizen concerns and build support for the mission of Town.

1 (MD, CH, CB, JM)

2

3

4

5

**Comments and analysis (recommended for all ratings; required for any rating of 4 or 5):**

MD - Fidel's desire to meet community needs has been exemplary. More public meetings and opportunities for the public to interact with staff is an area that I would like to see expanded.

KH - 1 - Excellent performance in this area. Continue to build systems that will scale to the increased demands of a growing community. The Select Board has seen an increase in community member direct requests due to increased responsiveness from Town Hall. The website roll out was accomplished and requires continuing staff investment to support the community needs and transparency goals. The MA Municipal Association will be awarding Reading a website recognition award for the upgrade which suggests that it is heading in the right direction. Mr Maltez has been in frequent communication with key partners and stakeholders such as our State delegation, volunteer board and committee members and two RMLD GM's. Results of this effort are pledges from RMLD to support Reading's climate and green energy initiatives such as the electrification of municipal buildings, the installation of EV chargers, support for the new school instructor design and prepping new municipal roofs for the addition of solar panels.

CH - Note on 2 below.

CB - Fidel is willing to meet with any one at anytime. We have had many forums and community meetings for particular projects in town. I am very impressed that in 1 year, Fidel has been able to foster progress and initiatives that are community needs while working within the budget.

I respect that being CEO of a town comes with many challenges and being pulled in different directions. It does not seem to bother Fidel and I think with so many balls in the air, he juggles at a good speed. Communication needs to be planned out in advance and considerate of the businesses and residents it will impact. This will have to be addressed as we move forward. Overall, the process works, but 2 weeks prior to the Holidays was not a good look for the town. Trashgate was communicated well and Fidel was very proactive in seeking help when it came to a tipping point. Going forward, I would like to see any major construction taking place in the town be presented to the SelectBoard in advance to make sure we can avoid unnecessary damage to residents and businesses.

JM - Improving communication is an area for continuous improvement, as we've seen this past year.

General/Overall Comments/Feedback:

MD - Fidel has been a great add to the town and town management. His “can do” attitude and boundless energy offer great new opportunities for the community. He has been omnipresent working with all and even collecting the trash during the TrashGate adventure. “Keep it up!”.

I really appreciate Fidel's support of new community activities like Beer Gardens, other downtown events, and the Menorah and Christmas tree during the holiday season. The Common offers lots of opportunity and we want to find great ways to continue to take further advantage of this.

KH - Mr Maltez has worked tirelessly this past year to address identified Select Goals from spring 2022 as well as to respond effectively to unexpected strategy shifts and challenges such as the Republic service outage. He completed an additional Harvard program on municipal finance and at the Select Board's urging and/or his own initiative brought in outside experts to assist the Select Board with a new affordable housing trust and to engage the Finance Committee in a meaningful dialogue about managing budgets and capital in this economic environment.

In his first year he and staff have supplied all essential services and successfully added new initiatives. Of particular note is the OUTSTANDING job that staff led by Mr Maltez have done in seeking out and winning significant grant funding for our long list of infrastructure needs. I am extremely optimistic that 2023 will continue to be a year in which Reading makes significant progress on community goals while maintaining our solid financial position.

CH - Fidel has been everywhere. He spends more time in Reading than he does at home. Each time I've called or emailed, he's responded as fast as possible. I've been extremely satisfied with his work ethic and commitment to Reading and as long as we continue to be financially sound, we are on the right track as a town. The way that he and more importantly the DPW, handled the entire trash saga was a bright spot in numerous weeks of uncertainty.

The only negative in 12 months is the way that the entire 18 Woburn Street scenario was handled. Local businesses were not adequately informed, if at all. Unfortunately, because of this happening right during the holiday season, local businesses suffered. During the Woburn Street contractor meeting this month, local business owners read the town the riot act and rightfully so. Fidel accepted blame for all of it and noted that he/town failed and would not let a scenario like that happen again.

CB - III

Suggestions/Ideas for the Future:

MD - Continue community presence and aggressive push for funding, projects and fun on the common!

Provide support for new, less experienced managers in multiple functions. Town Manager and Assistant Town manager should play active roles to make this as successful as possible.

Town Manager Comments on Review:

Suggestions/Ideas for the Future:

II - My only suggestion would be for him to continue to be a good listener and to always maintain an open mind.

III - Give yourself some "you" time a few days a week.

V - When Fidel first started, he understandably did not know many staff members and would miss adding staff members to certain meetings. As he got to know people more, he got better at this, but admits it is something that he still has to work on to make sure that everyone is at the table who needs to be, and that they have a say regarding policy and other issues.

VI - There is a lot of momentum in the town which feels really exciting. Stay focused and keep it moving forward!

Town Manager Comments on Review:



<b>February 7, 2023</b>		<b>Tuesday</b>	
	<b>Overview of Meeting</b>	<b>Dockser</b>	<b>7:00</b>
	<b>Public Comment</b>	<b>Board</b>	<b>7:05</b>
	<b>SB Liaison &amp; Town Manager Reports</b>	<b>Board</b>	<b>7:15</b>
	<b>Election Update from Town Clerk</b>	<b>Gemme</b>	<b>7:20</b>
<b>Hearing</b>	<b>Traffic Improvements: Stops Signs and Vehicle Direction at Hopkins Street and Main Street</b>	<b>Lt. Jones</b>	<b>7:30</b>
	<b>Vote Easement Requests Previously Approved by Town Meeting: Summit Village</b>	<b>Board</b>	<b>7:45</b>
	<b>Presentation from Public Works on Trash and Recycle Barrels</b>	<b>Board</b>	<b>8:00</b>
	<b>Discussion and Vote to Sign Lease Extension for the Reading Ice Arena Authority</b>	<b>Board</b>	<b>8:30</b>
	<b>Discussion on a Strategic Plan for Reading</b>	<b>Board</b>	<b>8:45</b>
	<b>Preview Warrant for April Town Meeting</b>	<b>Board</b>	<b>9:00</b>
	<b>Discuss Future Agendas</b>	<b>Board</b>	<b>9:30</b>
	<b>Approve Meeting Minutes</b>	<b>Board</b>	<b>9:45</b>
<b>February 21, 2023</b>		<b>Tuesday</b>	
	<b>Overview of Meeting</b>	<b>Dockser</b>	<b>7:00</b>
	<b>Public Comment</b>	<b>Board</b>	<b>7:05</b>
	<b>SB Liaison &amp; Town Manager Reports</b>	<b>Board</b>	<b>7:15</b>
<b>Hearing</b>	<b>Change of Manager - Anthony's Coal Fired Pizza</b>	<b>Maltez</b>	<b>7:30</b>
	<b>Update fom Reading Climate Advisory Committee</b>	<b>Board</b>	<b>7:45</b>
	<b>Vote to Close Warrant for April Town Meeting</b>	<b>Board</b>	<b>8:00</b>
	<b>Presentation from Economic Development Director on Parking Kiosk Roll-Out</b>	<b>Board</b>	<b>8:30</b>
	<b>Update on Meadow Brook/Lot 5 Property and Proposed Usage</b>	<b>Board</b>	<b>8:45</b>
	<b>Discuss Future Agendas</b>	<b>Board</b>	<b>9:00</b>
	<b>Approve Meeting Minutes</b>	<b>Board</b>	<b>9:30</b>
<b>March 7, 2023</b>		<b>Tuesday</b>	
	<b>Overview of Meeting</b>	<b>Dockser</b>	<b>7:00</b>
	<b>Public Comment</b>	<b>Board</b>	<b>7:05</b>
	<b>SB Liaison &amp; Town Manager Reports</b>	<b>Board</b>	<b>7:15</b>
	<b>Town Counsel Discussion</b>	<b>Board</b>	<b>7:30</b>
	<b>Quarterly EV Charging Station Update from RMLD</b>	<b>Board</b>	<b>7:45</b>
	<b>Town Accountant Financial Update</b>	<b>Board</b>	<b>8:00</b>
	<b>Vote to Accept Donation of Land, 0 Sanborn Lane</b>	<b>Board</b>	<b>8:30</b>

	<b>Discuss Future Agendas</b>	<b>Board</b>	<b>9:00</b>
	<b>Approve Meeting Minutes</b>	<b>Board</b>	<b>9:30</b>
<b>March 21, 2023</b>		<b>Tuesday</b>	
<b>April 4, 2023</b>	<b>TOWN ELECTION</b>		
<b>April 18, 2023</b>		<b>Tuesday</b>	
<b>April 24, 2023</b>	<b>ANNUAL TOWN MEETING</b>		
<b>April 27, 2023</b>	<b>ANNUAL TOWN MEETING</b>		
<b>May 1, 2023</b>	<b>ANNUAL TOWN MEETING</b>		
<b>May 4, 2023</b>	<b>ANNUAL TOWN MEETING</b>		
<b>May 9, 2023</b>		<b>Tuesday</b>	
<b>May 23, 2023</b>		<b>Tuesday</b>	
<b>June 6, 2023</b>		<b>Tuesday</b>	
<b>June 20, 2023</b>		<b>Tuesday</b>	
<b>July 11, 2023</b>		<b>Tuesday</b>	
<b>August 1, 2023</b>		<b>Tuesday</b>	
<b>August 22, 2023</b>		<b>Tuesday</b>	
<b>September 12, 2023</b>		<b>Tuesday</b>	
<b>September 26, 2023</b>		<b>Tuesday</b>	
<b>October 10, 2023</b>		<b>Tuesday</b>	
<b>October 24, 2023</b>		<b>Tuesday</b>	
<b>November 7, 2023</b>		<b>Tuesday</b>	
<b>November 13, 2023</b>	<b>SUBSEQUENT TOWN MEETING</b>		
<b>November 16, 2023</b>	<b>SUBSEQUENT TOWN MEETING</b>		
<b>November 20, 2023</b>	<b>SUBSEQUENT TOWN MEETING</b>		
<b>November 21, 2023</b>		<b>Tuesday</b>	
<b>Novmeber 27, 2023</b>	<b>SUBSEQUENT TOWN MEETING</b>		
<b>December 5, 2023</b>		<b>Tuesday</b>	
	<b>Vote to approve annual licenses (delegated to TM Office)</b>		
	<b>Vote to approve Liquor Licenses</b>		

<b>December 6, 2023</b>		<b>Wednesday</b>	
	<b>Department Budget Presentations</b>		
<b>December 12, 2023</b>		<b>Tuesday</b>	
	<b>Department Budget Presentations</b>		
	<b>Future Meetings - Agenda Items</b>		
	<b>VASC Policy Changes and Recommendations</b>	<b>VASC</b>	
	<b>Discuss Early Sunday Hours at Recreational Fields &amp; Parks</b>	<b>Rec Comm</b>	
	<b>Discuss/Vote to adopt Birch Meadow Master Plan (discuss with Town Counsel in advance)</b>	<b>Rec Comm</b>	
	<b>Public Safety Quarterly updates</b>	<b>Board</b>	
	<b>Air BnB update</b>	<b>CPDC</b>	
	<b>Update on 186 Summer Ave / Review of Select Board role (consult with Town Counsel)</b>	<b>Town Counsel</b>	
	<b>Discuss Police Department Policies with respect to Police Reform Legislation &amp; Department Accreditation</b>	<b>Board</b>	
	<b>Discuss and Approve Flag Policy</b>	<b>Board</b>	
	<b>Discuss Tree Lawn Pesticide Policy</b>	<b>BOH</b>	
	<b>Recurring Agenda Items</b>		
	<b>Close Warrant: Annual Town Meeting</b>	<b>March</b>	<b>3/1/2022</b>
	<b>Close Warrant: Subsequent Town</b>	<b>September</b>	<b>9/27/2022</b>
	<b>Appoint Town Accountant</b>	<b>March</b>	<b>Annual</b>
<b>HEARING</b>	<b>Approve Classification &amp; Appointments of Boards &amp; Committees</b>	<b>May</b>	<b>Annual</b>
		<b>May/June</b>	<b>Annual</b>
<b>HEARING</b>	<b>Approve Tax Classification</b>	<b>October</b>	<b>Annual</b>
<b>HEARING</b>	<b>Approve Licenses</b>	<b>December</b>	<b>Annual</b>
	<b>Liaison: RCTV members Report</b>		<b>Annual</b>
	<b>Liaison: CAB (RMLD) member Report</b>		<b>Annual</b>
	<b>Liaison: MAPC member Report</b>		<b>Annual</b>
	<b>Liaison: Reading Housing Authority</b>		<b>Annual</b>
	<b>Liaison: Reading Ice Arena Report</b>		<b>Annual</b>
	<b>Town Accountant Report</b>		<b>Qtrly</b>
	<b>Economic Development Director</b>		<b>Semi-ann</b>
	<b>Parking/Traffic/Transportation Task</b>		
	<b>Town Board &amp; Committee visits</b>		
	<b>Town Department visits</b>		
	<b>Review Select Board Goals</b>		
	<b>Review Town Manager Goals</b>		

## Select Board Draft Minutes

December 13<sup>th</sup>, 2022

Dockser called the meeting to order at 7:00 PM.

### Budget Presentations

Amy Lannon gave the board a presentation about the requested FY24 budget for the Library. The presentation can be found in the Select Board packet on the town website. She is requesting a 3.75% increase stemming from increases in salaries and materials.

The board discussed library hours specifically on Sundays, security information, more details about expenses and technology in the conference rooms.

Facilities Director Joe Huggins gave the board a presentation about the Facilities budget. Assistant Director Kevin Cabuzzi was also present. This presentation can be found in the Select Board packet on the town website. His budget request includes a 5.5% increase due to an increase in salaries for staff and maintenance overtime.

Town Accountant Sharon Angstrom gave the board a presentation of the FY 24 requested budget for the Finance Department. This budget request includes a 4.1% increase due to salary and expenses increases. She also went through shared costs which are up 2.7% overall.

Town Manager Maltez gave the board an overall budget summary presentation which can be found in the Select Board packet on the town website. He noted there needs to be \$88K in reductions (~.26%) to balance the budget which he will work on over the coming weeks.

### Minutes

The board edited previous meeting minutes.

**Haley moved to approve the meeting minutes from November 15<sup>th</sup>, 2022, as amended. The motion was seconded by Herrick and approved with a 5-0 vote.**

**Haley moved to approve the meeting minutes from November 21<sup>st</sup>, 2022, as amended. The motion was seconded by Herrick and approved with a 5-0 vote.**

### Senior Center Discussion

It was noted a building in town just went on the market that may be worth looking into. It is on Haven Street, the old Rite Aid building and it is on the market for \$2.5 million which is significantly lower than Harden Street. It is just under 8K sq feet.

Haley noted he doesn't believe the building is in good shape and there is not a lot of parking in the area. While it is cheaper, it would most likely require a lot more work.

Herrick agreed noting the building was not upkept and the location is not great.

Bacci feels it is something to look into because of the price tag but is not sure it is the answer for a senior center.

Herrick pointed out that the square footage is about the same as the current senior center which they have outgrown; she doesn't believe this is worth pursuing.

The board discussed potentially issuing another RFP with Town Counsel Ivria Fried and Jennie Merrill.

**Haley moved to authorize the town manager to work with Allison Jenkins to issue an RFP seeking the acquisition of land or buildings within town for senior center and municipal uses on such terms and conditions discussed during this meeting. Bacci seconded the motion and it was approved with a 5-0 vote.**

**Haley moved to go into Executive Session at 9:48 PM, including staff members Fidel Maltez, Caitlin Nocella and Ivria Fried and Jennie Merrill from Town Counsel's office, under Executive Session Purpose 6 to discuss the acquisition and value of 17 Harnden Street, as the Chair declares that an open meeting could have a detrimental effect on the bargaining position of the body and that the board will not reconvene in open session. The motion was seconded by McCarthy and approved with a unanimous roll call vote.**

DRAFT

## Select Board Draft Minutes

January 10<sup>th</sup>, 2023

KH via Zoom

Mark Dockser called the meeting to order at 7 PM.

### Public Comment

Joe Carnahan wanted to thank the board for their expanded holiday display this season.

### Liaisons

McCarthy reminded the board there are a number of town boards and committees that have vacancies if anyone would like to volunteer.

Herrick spoke about the School Committee budget. Volunteers are putting together a composting program which will pilot at Birch Meadow. She attended a Climate Advisory Committee meeting in which Greg Phipps also joined. RMLD has a need to generate local clean energy. Conservation Commission will discuss lot 5 on January 25<sup>th</sup>.

Bacci noted Recreation Committee heard about a donation from Reading Little League of a home run fence. There were discussions about the Sturgis park tennis courts. CPDC's last meeting had an executive session about 459 Main Street and then an open discussion about the Birch Meadow project. Winterfest will be on March 9<sup>th</sup>.

Haley thanked the ARPA committee for their work; the board has received a few thank you letters for their funds.

Dockser noted RECALC is meeting tomorrow to talk about next steps. There are a couple of public meetings planned as well as a lunch and learn at the senior center. MLK Day celebrations on Monday.

### Town Manager Report

Maltez noted the town received two grants; \$500K from MassDOT to do sidewalks on Auburn Street and Parkview Road, and a \$2M federal earmark to complete work at Maillet, Sommes, Morgan Resource Area.

### Health Department Update

Health Director Ade Solarin, Health Nurse Mallorie MacDonald and Director of Nursing for Public Schools Mary Giuliana gave the board a presentation on the current health status of the town. While they did note we are going through a surge of illnesses right now including COVID-19 again, it is important to note the numbers are nowhere near where they were the last two years. They explained current CDC guidelines for if you test positive with COVID and possible treatments that can be prescribed by your doctor. They will be offering vaccine clinics with the next one being held on January 20<sup>th</sup>. The schools are experiencing similar numbers as the town. The full presentation can be found in the Select Board packet on the town website.

### Housing Production Plan Discussion

Nicole Lambert is a project manager from Anser Advisory, who has been working with Andrew MacNichol and other planning staff with the town's housing production plan. She gave the board a presentation and went over the survey results which can be found in the Select Board packet on the town website.

### POST Program

Maltez noted there was only one student in this program and he has since graduated and there are no students in the pipeline for it. Both Wakefield and Reading are requesting a mutual termination of the program effective June 30<sup>th</sup>, 2023. This will be \$60K savings to the town. The town is currently building out a program of our own.

**Haley moved to terminate the Inter- Municipal Agreement with Wakefield for the POST Program effective June 30<sup>th</sup>, 2023. The motion was seconded by Bacci and approved with a unanimous roll call vote.**

### Town Manager Review

The board discussed how they want to proceed with doing the Town Managers review. They discussed what they wanted to see in the review as well as it matching up to the goals set earlier in the year. The board set a deadline for members to return their reviews to Human Resources and they will be shared at the next meeting.

### Affordable Housing Trust Fund Board

Maltez noted that the Town Clerk has not heard back from the Attorney Generals Office yet. They do have to provide us with an answer by March. It was the Town Clerks suggestion to hold off on officially appointing anyone until we hear back from the AG. If the board wanted to move forward they could start advertising and looking for members but hold off on doing anything officially until a later date.

### Budget Summary

Maltez noted the School Committee has finalized their budget and presented to the School Committee. He feels they are in good shape now. He went through a brief presentation summarizing the budget which has not changed since the board saw it in December. The presentation can be found in the Select Board packet on the town website.

The board discussed the trash contract costs and rolling out a program to provide trash and recycling barrels to residents.

### Future Agendas

The board discussed future agenda items.

### Minutes

The board edited previous meeting minutes.

**Haley moved to approve the meeting minutes from December 6<sup>th</sup>, 2022 as amended. The motion was seconded by McCarthy and approved with a unanimous roll call vote.**

**Haley moved to approve the meeting minutes from December 7<sup>th</sup>, 2022 as written. The motion was seconded by McCarthy and approved with a unanimous roll call vote.**

**Haley moved to adjourn at 10:46 PM. The motion was seconded by Bacci and was approved with a unanimous roll call vote.**

**DRAFT**