

# Equitable Growth Profile of Fairfax County

## Summary



Communities of color are driving Fairfax County's population growth, and their ability to participate and thrive is central to the county's success. While the county demonstrates overall strength and resilience, wide gaps in income, employment, education, and opportunity by race and geography place its economic future at risk.

Equitable growth is the path to sustained economic prosperity in Fairfax County. By creating pathways to good jobs, connecting younger generations with older ones, integrating immigrants into the economy, building communities of opportunity throughout the county, and ensuring educational and career pathways for all youth, Fairfax County can put all residents on the path toward reaching their full potential, and secure a bright future for the whole county.

### Foreword

Fairfax County, Virginia, is a diverse and thriving urban county and is the most populous jurisdiction in both the state of Virginia and the Washington, DC, metropolitan area with over one million residents. Fairfax County ranks second nationally in terms of household income with a median of \$110,292. While Fairfax County's socioeconomic data tends to be extremely positive overall, not all residents are prospering.

Earlier this year, representatives from public, private, nonprofit, faith, and community sectors came together to expand our understanding of equity as a key economic driver in Fairfax County. We also had the opportunity to bring forward a local perspective in the development of this study prepared by PolicyLink and by the University of Southern California's Program for Environmental and Regional Equity (PERE). These learnings are compelling. We recognize that our community's future will be much brighter if we ensure the full inclusion of all residents in our county's economic, social, and political life.

We believe that, by using this profile, we can engage our community in conversations to better understand the growth realities we face and spark actions that ensure our continued economic growth and competitiveness. We are committed to working together as public, private, and community leaders to guide our path toward a vision of "One Fairfax" – a community in which everyone can participate and prosper.



Karen Cleveland  
Interim President/CEO  
Leadership Fairfax, Inc.



Patricia Harrison  
Deputy County Executive  
Fairfax County Government



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Northern Virginia Health Foundation

## Overview

Across the country, communities are striving to put plans, policies, and programs in place that build healthier, more prosperous regions that provide opportunities for all of their residents to participate and thrive.

Equity – full inclusion of all residents in the economic, social, and political life of the region, regardless of race/ethnicity, and nativity, age, gender, neighborhood of residence, or other characteristics – is essential for regional prosperity. As the nation undergoes a profound demographic transformation in which people of color are quickly becoming the majority, ensuring that people of all races and ethnicities can participate and reach their full potential is more than just the right thing to do – it is an absolute economic imperative.

In the past, equity and growth have often been pursued on separate paths, but it is now becoming increasingly clear that they must be pursued together. The latest research on national and regional economic growth, from economists working at institutions including the International Monetary Fund and Standard and Poor's, finds that inequality hinders economic growth and prosperity, while greater economic and racial inclusion fosters greater economic mobility and more robust and sustained growth.<sup>1</sup>

Embedding equity into local and regional development strategies is particularly important given the history of metropolitan development in the United States. America's regions are highly segregated by race and income, and these patterns of exclusion were created and maintained by public policies at the federal, state, regional, and local levels. In the decades after World War II, housing and transportation policies incentivized the growth of suburbs while redlining practices and racially restrictive covenants systematically prevented African Americans and other people of color (as well as some White immigrant populations, such as Jewish Americans) from buying homes in new developments while starving older urban neighborhoods of needed reinvestment. Many other factors – continued racial discrimination in housing and employment, exclusionary land use practices that prevent construction of affordable multifamily homes in more affluent neighborhoods, and political fragmentation – have reinforced geographic, race, and class inequities.

Today, America's regions are patchworks of concentrated advantage and disadvantage, with some neighborhoods home to good schools, bustling commercial districts, services, parks,

and other crucial ingredients for economic success, and other neighborhoods providing few of those elements. The goal of regional equity is to ensure that all neighborhoods throughout the region are communities of opportunity that provide their residents with the tools they need to thrive.

The Equitable Growth Profile of Fairfax County examines demographic trends and indicators of equitable growth, highlighting strengths and areas of vulnerability in relation to the goal of building a strong, resilient economy. It was developed by PolicyLink and the Program for Environmental and Regional Equity (PERE) to help the Fairfax County government, advocacy groups, elected officials, planners, business leaders, funders, and others working to build a stronger region.

This summary document highlights key findings from the profile along with policy and planning implications.

### Equitable Growth Indicators

This profile draws from a unique Equitable Growth Indicators Database developed by PolicyLink and PERE. This database incorporates hundreds of data points from public and private data sources such as the U.S. Census Bureau, the U.S. Bureau of Labor Statistics, and Woods & Poole Economics, Inc. The database includes data for the 150 largest metropolitan regions and all 50 states, and includes historical data going back to 1980 for many economic indicators as well as demographic projections through 2040. It enables comparative regional and state analyses as well as tracking change over time.

### Geography

This profile describes demographic and economic conditions in Fairfax County and Fairfax City, which are situated within the Washington, DC, metropolitan statistical area. In some cases, we present data separately for the county and city, as well as census tract level data. Unless otherwise noted, all data follow this regional geography, which is simply referred to as "Fairfax County."

## Profile Highlights

### The region is undergoing a major demographic shift

Fairfax County is growing and its demographics are quickly diversifying. Since 1980, its population has nearly doubled, from 600,000 to over 1 million. During the same time period, the share of residents who are people of color has more than tripled, from 14 to 45 percent. By 2044, when the nation is projected to become majority people of color, over 70 percent of the county's population will be people of color.

Communities of color – especially Latinos, Asians, and people of other and mixed racial backgrounds – accounted for all of the net population growth over the last decade, contributing 130 percent of the growth and offsetting a decline in the White population. Latinos were the fastest growing group, increasing 57 percent and gaining more than 62,000 residents, followed by Asians, with a 50 percent growth rate and a slightly higher net gain of over 64,000 residents. For both Latinos and Asians, the U.S.-born has a faster growth rate over the decade than immigrants. The county’s Black population has stabilized and will remain about a tenth of the population for the foreseeable future. The majority of the county’s Middle Eastern population are immigrants (60%), but the U.S.-born Middle Eastern population is growing more quickly than the immigrant population.

The county’s demographic shift is taking place throughout the county and the city of Fairfax. By 2040, two-thirds of Fairfax City’s residents will be people of color, compared with 72 percent in Fairfax County. Between 2010 and 2040, people of color will continue to drive growth in the county.

Youth are at the forefront of the county’s changing demographics, and Fairfax’s young residents are much more diverse than its seniors. Today, 52 percent of youth are people

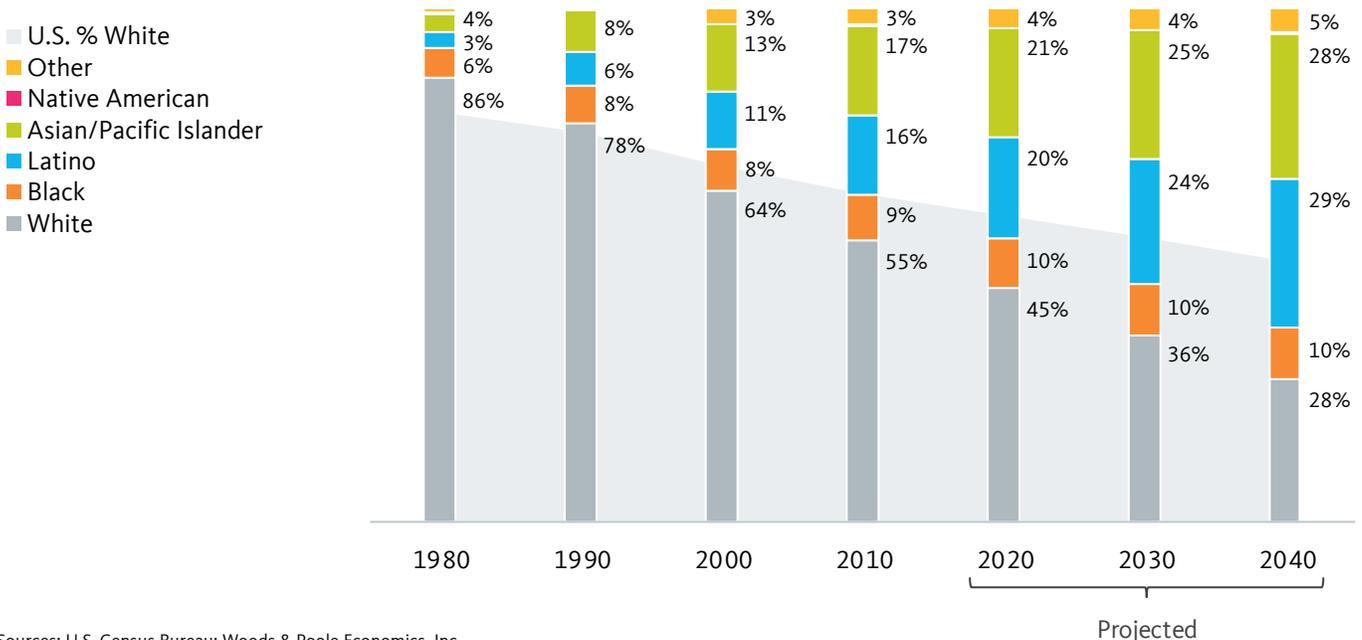
of color, compared with 27 percent of seniors. This 25 percentage point racial generation gap between young and old has risen very quickly, more than tripling since 1980. This gap presents a potential economic risk for the county because a large racial generation gap often corresponds with lower investments in the educational systems and community infrastructure needed to support the economic participation of youth.<sup>2</sup>

**Stronger and more equitable growth is the key to the county’s future prosperity**

While Fairfax County’s economy has been strong in the past and remains so to this day, it has struggled somewhat to recover from the Great Recession: while its GDP and job growth remain higher than national averages, its GDP is growing at less than half its pre-recession rate. Additionally, while growth in jobs and earnings has outpaced averages for the nation and the Washington, DC, metro as a whole since 1990, much of it has been concentrated in high-wage jobs: jobs and earnings for high-wage workers have increased by more than the combined rates for medium and low-wage workers. While this should be celebrated as a sign of strength, it has also contributed to heightened economic inequality and a shrinking middle class, which can pose a threat to maintaining a prosperous and sustainable economy moving forward.

The share of people of color is projected to increase through 2040

**Racial/Ethnic Composition, 1980-2040**



Sources: U.S. Census Bureau; Woods & Poole Economics, Inc.

In addition to these trends of uneven growth, racial gaps – especially for Blacks and Latinos – in education, employment, and income have persisted and in some cases widened over time. As the county grows more diverse, these inequities become an even more serious threat to economic strength and competitiveness. Below are several key challenges the county will need to address to ensure a strong economy and a better shot at returning to the high growth seen prior to the recession.

**Educational barriers for marginalized communities remain**

A strong education is central to labor market competitiveness in today’s knowledge and technology-driven economy, but a growing segment of Fairfax’s workforce lacks access to the education needed for the jobs of the future. According to the Georgetown Center for Education and the Workforce, 45 percent of all jobs in Virginia will require an associate’s degree or higher by 2020. Today only 25 percent of Latino immigrants in Fairfax County have that level of education. Even without achievement gaps, Latino immigrants have limited access to good jobs: while every other group with a bachelor’s degree or higher has over half of its workforce in high-opportunity jobs, only 37 percent of Latino immigrants with the same level of education work in these positions. Similarly, college-educated Latino immigrants work in low-opportunity jobs at a rate nearly four times higher than the county average.

**The middle and lower classes are being squeezed**

A strong middle class is the foundation for a strong economy, but Fairfax County’s middle class is being squeezed while inequality is on the rise. Since 1979, the share of middle-class

households in the county has shrunk significantly, from 40 percent to 33 percent. This decrease has been absorbed by lower-class households, whose share of all households grew from 30 percent to 40 percent during the same period. Encouragingly, the racial composition of middle-class households has shifted to become more reflective of the racial composition of the county’s households. People of color make up 34 percent of middle-class households compared to 37 percent of all households. This provides evidence of some economic inclusion of Black and emerging Latino and Asian/Pacific Islander populations.

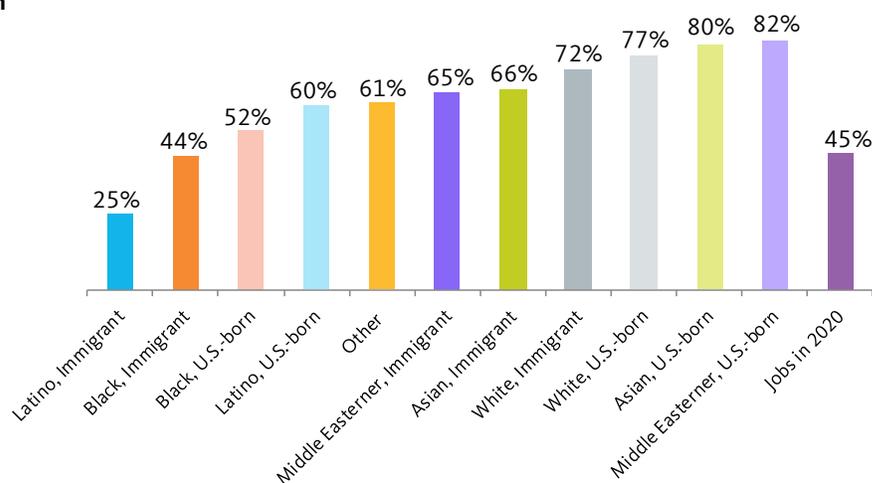
While earnings for low-wage jobs have increased 18 percent over the past two decades, that is slightly more than half the rate of the increase for middle-class jobs and – alarmingly - less than one-third the increase for high-wage jobs during the same time period. At the far end of the spectrum, wages for the bottom 10<sup>th</sup> and 20<sup>th</sup> percentiles have actually decreased since 1979. This has a disproportionate impact on people of color who are more likely to work in low-wage jobs.

**Racial economic gaps**

Across a host of indicators, including employment, wages, poverty, working poor rates, and access to “high-opportunity” occupations, people of color fare worse in the Fairfax labor market than their White counterparts. These racial economic gaps remain even after controlling for education, which reveals the persistence of racial barriers to economic opportunity – including overt discrimination as well as more subtle forms of exclusion that are embedded into institutions and systems.

Raising educational attainment among the county’s communities of color is critical to building a prepared workforce

**Share of Working-Age Population with an Associate’s Degree or Higher by Race/Ethnicity and Nativity, 2012, and Projected Share of Jobs that Require an Associate’s Degree or Higher, 2020**



Sources: Georgetown Center for Education and the Workforce; IPUMS. Universe for education levels of workers includes all persons ages 25 through 64. Note: Data for 2012 by race/ethnicity and nativity represent a 2008 through 2012 average at the county level; data on jobs in 2020 represents a state-level projection for Virginia.

While overall unemployment in Fairfax County is lower than the national average, Latinos, Blacks, and especially people with other and mixed racial backgrounds have much higher rates of unemployment than Whites. Black workers face higher unemployment rates than their White and Latino counterparts at almost every education level, and both Black and – especially – Latino residents earn lower wages than Whites at every education level. Wage disparities persist even among highly educated workers, with college-educated (BA degree only) Blacks and Latinos earning \$9/hour and \$16/hour less than their White counterparts, respectively. Middle Eastern groups, too, lag behind Whites earning \$9/hour less.

Poverty and a growing number of people who are working poor (defined here as working full-time for an income below 150 percent of the poverty level) are both on the rise in the county and are most severe for communities of color. Over one in ten Latinos and Blacks now live below the poverty level, compared to less than one in 30 Whites. Working poverty is particularly a problem for Latinos and Middle Easterners. In addition, U.S.-born Latino and Black children are five and six times more likely, respectively, to live in poverty compared to White children. Finally, a disproportionate share of Black and Latino households (49 and 56 percent) are rent burdened compared to Asian and White households (42 and 39 percent), which further limits geographic and economic mobility.

**Disconnected youth**

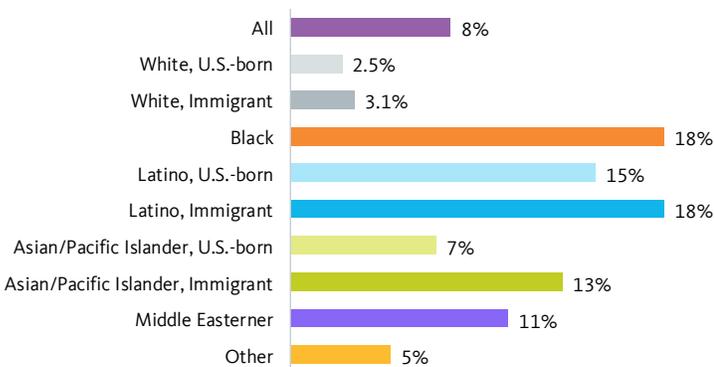
The county’s future quite literally depends on the ability of its youth to power its economy in the years to come. Although the fact that more of the county’s youth are getting high school degrees than in the past is a positive sign, the number of “disconnected youth” who are neither in school nor working is also on the rise. In the county, nearly 9,200 youth are currently disconnected, nearly half of whom are Black and Latino. On the positive side, dropout rates have improved significantly over the past decade for Blacks and U.S.-born Latinos, although more than a quarter of Latino immigrant youth still drop out of high school or lack a diploma, compared to only 1 percent of Whites.

**An uneven geography of opportunity and prosperity**

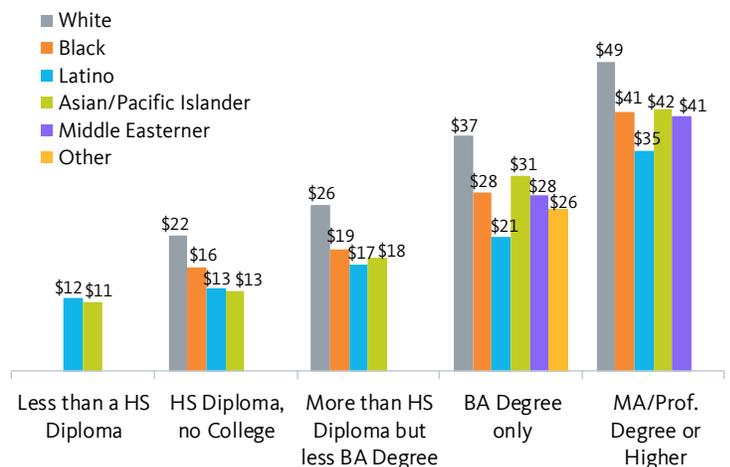
While Fairfax County as a whole is quite prosperous, the wealth of opportunities that the county has to offer are not distributed evenly across the county. In particular, the southeastern portion of the county has the lowest child opportunity and health opportunity when compared to other areas in the county. Similarly, communities in the southeastern portion of the county have higher poverty rates and higher shares of rent-burdened households (households spending 30 percent or more of income on rent). Not coincidentally, communities of color are concentrated in the same areas that are faring worse.

The county’s Blacks and Latinos earn disproportionately low wages and are more likely to have children living in poverty

**Child Poverty Rate by Race/Ethnicity and Nativity, 2012**



**Median Hourly Wage by Educational Attainment and Race/Ethnicity, 2012**



Source: IPUMS. Universe includes the population under age 18 not in group quarters. Note: Data represent a 2008 through 2012 average.

Source: IPUMS. Universe includes civilian non-institutional full-time wage and salary workers ages 25 through 64. Note: Data represent a 2008 through 2012 average.

### Racial economic inclusion would strengthen the economy

Fairfax County’s rising inequality and racial gaps are not only bad for communities of color – they hinder the whole county’s economic growth and prosperity. According to our analysis, if there were no racial disparities in income, GDP would have been \$26.2 billion higher in 2012. Unless racial gaps are closed, the costs of inequity will grow as Fairfax County becomes more diverse.

### Implications

Fairfax’s growing, diverse population is a major economic asset that will help the county compete in the global economy, if the county’s leaders invest in ensuring all of its residents can connect to good jobs and contribute their talent and creativity to building a strong next economy. Our data analysis suggests focusing on the following goals to spur more equitable growth in the county. Below we describe each goal and share strategies that the county’s leaders might pursue to advance these goals.

County leaders have already thought through many of these same issues, documented in the County Board of Supervisors Strategic Plan to Facilitate Economic Success, for example. Yet the goals we suggest are much more intentional in defining that successful growth means equitable growth and that the county’s people of color – often marginalized from the economic processes – are key drivers to the economic future.

### Create pathways to good jobs for workers facing barriers to employment

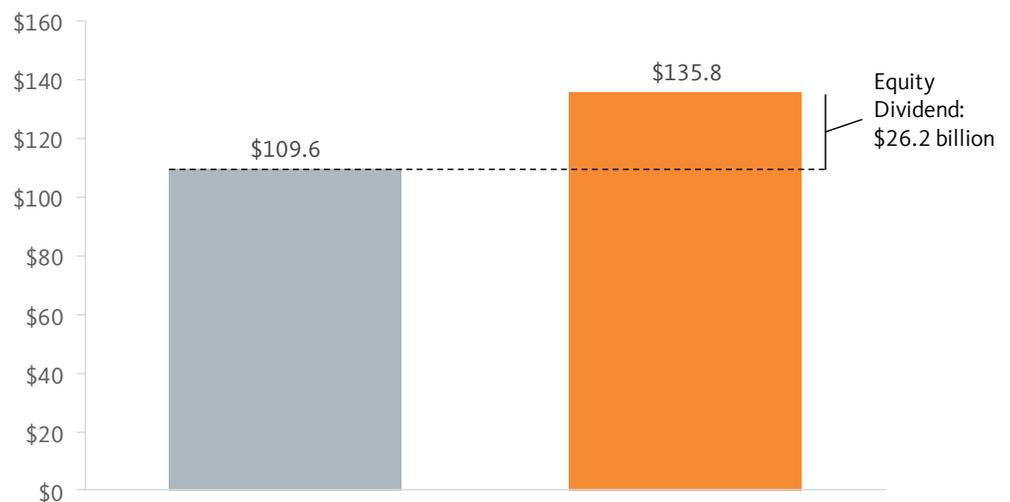
The county’s higher levels of unemployment and lower levels of educational attainment for many members of its communities of color call for a strong focus on creating on-ramps to good, family-supporting careers for these populations. There are several promising approaches to building these pathways:

- Implement sectoral workforce strategies that connect workers with low education levels to high-quality training programs that lead to gainful employment in growing sectors of the economy. Such approaches are a win-win for employers who need access to skilled workers as well as workers seeking employment.
- Ensure public investments in roads, transit, sewers, and other community infrastructure are made in ways that create job opportunities for the underemployed and unemployed. This can be done by targeting investments in neighborhoods where unemployment and poverty are high and by implementing local and targeted hiring and training strategies.
- Remove barriers and implement strategies to help minority-owned businesses expand. This can create employment pathways for people who are jobless because these firms tend to hire more employees of color and people living in the community.

Fairfax County’s GDP would have been \$26.2 billion higher in 2012 if there were no racial disparities in income

#### Actual GDP and Estimated GDP without Racial Gaps in Income, 2012

- GDP in 2012 (billions)
- GDP if racial gaps in income were eliminated (billions)



Sources: U.S. Bureau of Economic Analysis; IPUMS; U.S. Bureau of Labor Statistics.

- Leverage the economic power of large anchor institutions, like hospitals and universities, for community economic development. These anchors can develop intentional strategies to hire jobseekers facing barriers to employment, create on-the-job training opportunities, and purchase more goods and services from local- and minority-owned businesses who provide local jobs.

***Fairfax County's effort to create career pathways for long-term growth.***

The Northern Virginia Workforce Investment Board (NVWIB) is a team of private and public sector partners who share a common goal to promote Northern Virginia economic prosperity and long-term growth. The board receives and administers annual federal Workforce Investment Act (WIA) dollars that help fund comprehensive employment and training services to area employers, job seekers, and youth. The NVWIB oversees six SkillSource One Stop Employment Centers and they offer a broad array of employment assessment, workforce counseling, job training, and support services for jobseekers. Total adult job seekers' visits to the SkillSource Centers are projected to exceed 65,000 in FY 2015. Learn more at [www.myskillsource.org](http://www.myskillsource.org).

***Bridge the racial generation gap***

Bridging the racial generation gap between youth of color and a predominantly White senior population is critical to ensure a strong workforce in the county. This is reflected by the Fairfax County Board of Supervisors when it initiated its Fairfax 50+ Community Plan that addresses the dramatic aging of the baby boomer population and the long-term socioeconomic planning needed to facilitate a well-cared-for and opportunity-rich region for all.

One arena where seniors and young workers of color and their families have shared interests is elder care. Ensuring living wages, benefits, and adequate training and standards for care workers is a win-win path to strengthen the quality of elder care. When care jobs are good jobs that can support a family, turnover is lower and care is not disrupted. Worker organizing, innovative business models, and policy changes are all strategies to improve the quality of elder care and care work. Another way to build bridges is to plan for multigenerational communities, which allow the elderly to age in place while providing safe and healthy environments for families to raise children. Investments in multigenerational community facilities and public spaces (for example, schools that include facilities for seniors) can encourage social interaction between residents of all ages.

***Caring Across Generations Campaign advocates for the rights of seniors and their care workers.***

The Caring Across Generations campaign is a national movement to bring together families, workers, and others to transform the care industry and ensure seniors and care workers can live with dignity. In Illinois, Missouri, Ohio, and elsewhere, the campaign builds broad coalitions to make care work visible, highlighting its value to the overall economy and the support it provides families. Caring Across Generations' policy reforms include increasing access to in-home care for Medicaid recipients and ensuring care jobs pay a living wage and provide benefits, training opportunities, and a pathway to citizenship. Learn more at [www.caringacross.org](http://www.caringacross.org).

***Integrate immigrants into the county's economy***

Immigrants are contributing to growth in the county, yet they face barriers to fully participating in economic and civic life. Many regions are implementing successful strategies to ensure immigrants have access to the services, education and training, entrepreneurship, and job opportunities they need to thrive. The high growth rate among immigrant populations reinforces the necessity of strong local programs focused on integration and training into the local and national economy.

***Tennessee welcomes immigrants to build a stronger economy.***

Responding to a rapidly growing immigrant population (the third-fastest growing in the nation), the Welcoming Tennessee Initiative was launched in 2005 to counter anti-immigrant backlash and strengthen the local economy. Using dinner conversations between long-time residents and immigrants, billboards, and other community strategies, the initiative successfully defeated English-only referendums and legislation. Since then, the project has inspired a national Welcoming America initiative, with affiliates in 21 states. Learn more at [www.welcomingamerica.org](http://www.welcomingamerica.org).

***Build communities of opportunity throughout the county***

All neighborhoods located throughout the county should provide their residents with the ingredients they need to thrive and also open up opportunities for low-income people and people of color to live in neighborhoods that are already rich with opportunity (and from which they've historically been excluded).

Coordinating transportation, housing, and economic development investments over the long term will foster more

equitable development patterns and healthier neighborhoods across the county. Addressing lingering racially discriminatory housing and lending practices and enforcing fair housing laws are also critical to expand opportunity for all.

***Reinforcing the link between equity and health in California.***

In 2010, The California Endowment launched a 10-year \$1 billion Healthy Neighborhoods Initiative to advance statewide policy, change the narrative, and transform 14 of California's communities most devastated by health inequities into places where all people have an opportunity to thrive. Research on the social determinants of health has found that 70 percent of health outcomes are determined by the social, political, and economic environments that shape the choices we make. The Building Healthy Communities place-based investment prioritizes working with residents and the public sector on policy changes. Learn more at [www.calendow.org/building-healthy-communities/](http://www.calendow.org/building-healthy-communities/).

***Ensure education and career pathways for all youth***

Ensuring that all youth in the county, including Blacks, Native Americans, Latinos, and immigrants, can access a good education that leads to a career is critical to develop the human capital to power the county's economy in the future. The high share of immigrant youth without high school degrees signals the need for intentional strategies to ensure young people have the supports they need to successfully complete high school and enter college or another training program that leads to a job. Replacing overly harsh "zero tolerance" school discipline policies with strategies focused on positive behavior support and restorative justice can work to lower suspension and expulsion rates and reduce the number of disconnected youth. Increasing the availability of apprenticeships, career academies, and other education and training supports that provide work experience and connections can also keep more youth on the track to graduation, college, and careers.

Strengthening the K-12 public school system by ensuring sufficient and equitable funding for schools attended by lower-income students is also essential to build a vital workforce. Bilingual education and other language access strategies can help youth who are English-language learners excel in school. And it is not enough to only address in-school time; high-quality afterschool and youth development activities that provide learning opportunities outside of the school day are also critical ingredients for academic success. And Fairfax County is already on the right path by looking forward to ensure coordination and

delivery of workforce training programs for students by partnering with the Northern Virginia Community College and Fairfax County Public Schools. This strategy entails talking with key employers along with assessing workforce development programs to determine if they are properly aligned to meet the projected employment needs in the county. This can feed into ensuring these investments in educational success follow children throughout their lifespan, from cradle to college to career. The research shows that balanced investments spread throughout the lives of vulnerable children reap the greatest rewards.

***Foster diverse civic participation and leadership***

Given the county's rapid demographic shifts that are being driven by the increasing diversity of the youth population, it is important for county leaders in every sector to proactively take steps to ensure opportunities for communities of color to participate in decision making and leadership. Strategies to build diverse leadership include the following:

- Create a durable countywide equity network or collaborative of leaders across race, age, issue areas, and geography to advance equitable growth strategies and policies.
- Facilitate active engagement by all racial and ethnic communities in local planning processes by implementing best practices for multicultural engagement (e.g., translation services, provision of child care during meetings, etc.).
- Support leadership development programs (such as the Boards and Commissions Leadership Institute), including youth-focused programs, to help neighborhood, organizational, and civic leaders build their leadership and capacity to serve in government and on decision-making bodies.

***Boards and Commissions Leadership Institute trains next generation of leaders.***

Since 2010, Urban Habitat's Boards and Commissions Leadership Institute has been training leaders from underrepresented San Francisco Bay Area communities to serve on decision-making bodies. The Institute empowers residents to become leaders on the issues that have the most direct impact on their neighborhoods: transportation, housing, jobs, and more. Graduates have won 35 seats on priority boards and commissions, including planning commissions, housing authorities, and rent boards. The program is being replicated in the Twin Cities, Sacramento, and elsewhere. Learn more at [www.urbanhabitat.org/leadership/bcli](http://www.urbanhabitat.org/leadership/bcli).

## Conclusion

Community leaders in the public, private, and nonprofit sectors are already taking steps to connect its more vulnerable communities to educational and economic opportunities, and these efforts must continue. To secure a prosperous future, Fairfax needs to implement a growth model that is driven by equity – just and fair inclusion into a society in which everyone can participate and prosper. Concerted investments and policies for, and developed from within, communities of color will also be essential to ensure the county's fastest-growing populations are ready to lead it into the next economy.

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<sup>1</sup> Andrew G. Berg and Jonathan D. Ostry, *Inequality and Unsustainable Growth: Two Sides of the Same Coin?*, Staff Discussion Note (Washington, DC: International Monetary Fund, 2011) <http://www.imf.org/external/pubs/ft/sdn/2011/sdn1108.pdf>; Jonathan D. Ostry, Andrew Berg, and Charalambos G. Tsangarides, *Redistribution, Inequality, and Growth*, Staff Discussion Note (Washington, DC: International Monetary Fund, 2014) <http://www.imf.org/external/pubs/ft/sdn/2014/sdn1402.pdf>; Joe Maguire, *How Increasing Inequality is Dampening U.S. Economic Growth, and Possible Ways to Change the Tide* (New York, NY: Standard & Poor's Financial Services LLC, 2014) [https://www.globalcreditportal.com/ratingsdirect/renderArticle.do?articleId=1351366&SctArtId=255732&from=CM&nsi\\_code=LIME&sourceObjectId=8741033&sourceRevId=1&fee\\_ind=N&exp\\_date=20240804-19:41:13](https://www.globalcreditportal.com/ratingsdirect/renderArticle.do?articleId=1351366&SctArtId=255732&from=CM&nsi_code=LIME&sourceObjectId=8741033&sourceRevId=1&fee_ind=N&exp_date=20240804-19:41:13); Manuel Pastor, *Cohesion and Competitiveness: Business Leadership for Regional Growth and Social Equity*, OECD Territorial Reviews, Competitive Cities in the Global Economy, Organisation For Economic Co-Operation And Development (OECD), 2006; Manuel Pastor and Chris Benner, "Been Down So Long: Weak-Market Cities and Regional Equity," in *Retooling for Growth: Building a 21<sup>st</sup> Century Economy in America's Older Industrial Areas* (New York, NY: American Assembly and Columbia University, 2008); Randall Eberts, George Erickcek, and Jack Kleinhenz, *Dashboard Indicators for the Northeast Ohio Economy*, prepared for the Fund for Our Economic Future (Cleveland, OH: Federal Reserve Bank of Cleveland, 2006), <https://www.clevelandfed.org/~media/Files/Working%20Papers/wp2006/wp0605-dashboard-indicators-for-the-northeast-ohio-economy-prepared-for-the-fund-for-our-economic-future.pdf?la=en>.

<sup>2</sup> David N. Figlio and Deborah Fletcher, *Suburbanization, Demographic Change and the Consequences for School Finance*, working paper (Cambridge, MA: National Bureau of Economic Research, 2010), <http://www.nber.org/papers/w16137.pdf>.

Cover photos courtesy of Fairfax County, Virginia.

Equitable Growth Profiles are products of a partnership between PolicyLink and PERE, the Program for Environmental and Regional Equity at the University of Southern California.

The views expressed in this document are those of PolicyLink and PERE, and do not necessarily represent those of Fairfax County, Virginia.

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**The Successful Children and Youth Policy Team recommends to  
the Fairfax County Board of Supervisors and School Board:**

**RESOLUTION**

**“One Fairfax”**

Whereas, Fairfax County takes pride as a great place to live, learn, work, and play; and,

Whereas, Fairfax County is the largest and strongest economy in the Washington Metropolitan area and one of the strongest in the nation; and,

Whereas, county and school leaders and staff are committed to providing excellent services for every resident of Fairfax; and,

Whereas, Fairfax County government has established a vision of Safe and Caring Communities, Livable Spaces, Connected People and Places, Healthy Economies, Environmental Stewardship, Culture of Engagement and Corporate Stewardship; and Fairfax County Public Schools has established goals of Student Success, a Caring Culture, a Premier Workforce, and Resource Stewardship; and,

Whereas, Fairfax County embraces its growing diverse population and recognizes it as a tremendous economic asset but recognizes that racial and social inequities still exist; and,

Whereas, achieving racial and social equity are integral to Fairfax County’s future economic success, as illustrated in the Equitable Growth Profile and highlighted as a goal in the Strategic Plan to Facilitate the Economic Success of Fairfax County; and,

Whereas, we define **Racial Equity** as the development of policies, practices and strategic investments to reverse racial disparity trends, eliminate institutional racism, and ensure that outcomes and opportunities for all people are no longer predictable by race; and

Whereas, we utilize the term **Social Equity** to consider the intersection and compounding effects of key societal issues such as poverty, English as a second language, disability, etc. with race and ethnicity; and,

Whereas, as servants of the public we are committed to the definition of social equity adopted by the National Academy of Public Administration – “the fair, just and equitable management of all institutions servicing the public directly or by contract; the fair, just and equitable

distribution of public services and implementation of public policy; and the commitment to promote fairness, justice, and equity in the formation of public policy.”

Whereas, it is essential to identify and address institutional and systemic barriers that exist and understand that these barriers may impede access to opportunities for achieving the visions and goals set forth by county leaders; and,

Whereas, an extensive body of research has established that a community’s access to an interconnected web of opportunities shapes the quality of life for all; and,

Whereas, to truly create opportunity, we need to understand and improve our work through a racial and social equity lens from the very core of the organization outward, focusing intentionally and deliberately towards sustainable structural changes; and,

Whereas, a growing number of local jurisdictions across the United States are adopting intentional equity strategies and see equity as an economic growth model;

NOW, THEREFORE, BE IT RESOLVED BY THE FAIRFAX COUNTY BOARD OF SUPERVISORS AND THE FAIRFAX COUNTY SCHOOL BOARD that:

The time is now to move beyond embracing diversity as an asset and implement a new growth model driven by equity — just and fair inclusion into “One Fairfax,” a community in which everyone can participate and prosper.

“One Fairfax” can only be realized with an intentional racial and social equity policy at its core for all publicly delivered services. A racial and social equity policy provides both the direction and means to eliminate disparities, and work together to build a vibrant and opportunity-rich society for all.

In July, 2016, the Fairfax Board of Supervisors and School Board join in this resolution and direct the development of a racial and social equity policy for adoption and strategic actions to advance opportunities and achieve equity that include intentional collective leadership, community engagement, equity tools and infrastructure to support and sustain systemic changes, and shared accountability so collectively, we will realize “One Fairfax,” a community where everyone can participate and prosper.

# SUCCESSFUL CHILDREN AND YOUTH POLICY TEAM MULTI-YEAR PLAN TO SUPPORT CHILDREN'S SCHOOL READINESS

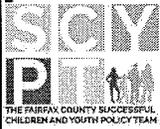
## Current Goals and Strategies

1. Create a learning network of quality early care and education programs that promotes school readiness through the alignment of curricula to the *Virginia Foundation Blocks for Early Learning* in order to build knowledge and awareness of shared kindergarten expectations.
  - Expand Neighborhood School Readiness Teams (NSRT) throughout Fairfax County to develop school, county, community partnerships.
  - Provide on-site coaching for early childhood professionals.
2. Support children living in poverty to reach fall kindergarten benchmarks as reported on a universal screener.
  - Increase access to quality programming through expansion of Virginia Preschool Initiative.
  - Expand Virginia Quality Rating and Improvement System (VQRIS) in order to support quality in more early childhood programs.
  - Provide additional access to affordable, quality child care through the Child Care Assistance and Referral program.
3. Improve accountability and opportunities for data-driven decision making through a comprehensive early childhood data system.
  - Establish a joint county/FCPS work group to develop recommendations for identifying and implementing an integrated early childhood longitudinal data system that connects existing program data and provides the county and FCPS with the ability to analyze and strategically support positive school readiness outcomes for children and families.
  - Link the early childhood longitudinal data system to the FCPS data system.
4. Provide place-based coordinated services (early care and education, health, mental health, nutrition, social services, dental) for children and their families in locations near their work or home.
  - Establish a joint county/FCPS early childhood education capital improvement task force in coordination with the *Capital Facilities and Debt Management Committee* to strategically plan for future development of space for place-based early childhood programs co-located with coordinated services that support children and their families.

# Successful Children and Youth Policy Team

Update to the Human Services Council  
June 14, 2016

Jesse Ellis



## Why SCYPT?

*From our charter:*

In order to become confident individuals, effective contributors, successful learners and responsible citizens, all of Fairfax County's children need to be safe, nurtured, healthy, achieving, active, included, respected and responsible. **This can only be realized if the county, schools, community and families pull together to plan and deliver top-quality services, which overcome traditional boundaries.**



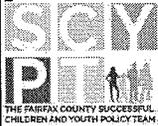
## Youth Behavioral Health

- **Key Successes**

- In 2014, endorsed a plan to increase BH services for youth
  - System of Care Office created
  - Short-term behavioral health services pilot
  - Expansion of training and assessment tools
  - Implementation and expansion of crisis textline
  - Development of a longer-term plan
- In 2016, endorsed Children’s Behavioral Health System of Care Blueprint
  - 3-year plan to expand and strengthen the system of care

- **Future Priorities**

- Support implementation of the Blueprint
  - Work on 14 of the 15 goals in the Blueprint will begin in FY 2017
- Review opportunities for re-implementing school-based drug counselors



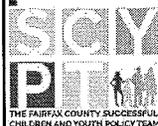
## School Readiness

- **Key Successes**

- In 2013, endorsed a plan to increase access to and quality of services to promote school readiness
  - Expansions of Neighborhood School Readiness Teams, Virginia Preschool Initiative (VPI), Virginia Quality Rating and Improvement System, and Child Care Assistance and Referral
  - On-site coaching for early childhood professionals

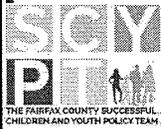
- **Future Priorities**

- Short-term opportunities to increase access to pre-K programs
- Long-term strategic plan for school readiness



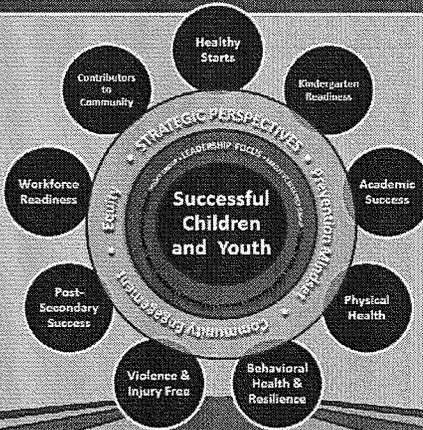
# Additional Areas for Action

- Opportunity Neighborhoods
- Community Schools
- Internet Access
- Disconnected Youth

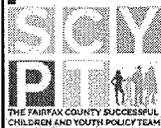


## Governance and Accountability Structure: Successful Children and Youth

Thriving People ❖ Thriving Economy ❖ Thriving Communities



<p><b>Collective Action Networks and Goal Teams</b> to plan and align strategically around key outcome areas</p>	<p><b>Data-driven planning, decision-making, and accountability</b></p>	<p><b>Cross-System Operations, Management and Support</b> to align work and resources across systems</p>	<p><b>Place-Based Focus</b> to ensure all neighborhoods become the kinds of places that enable children and families to succeed and thrive</p>
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# EARLY CHILDHOOD DEVELOPMENT: A SMART INVESTMENT

Joint Board of Supervisors-School Board  
Retreat

June 14, 2016



# WHY INVEST?

## CHILDREN

- Close the learning gap and improve equity in achieving lifelong learning

## COMMUNITY

- Increase economic activity and adult human capital development

## ENSURE SUCCESS

- Start from birth
- Serve children *and* their families
- Enhance program quality

**A SMART INVESTMENT**

A young child with dark hair is looking down at a book. The child is wearing a white shirt with a red patterned tie. The image is partially obscured by a light green circular graphic on the left side of the slide.

# SCHOOL READINESS: AN INVESTMENT STRATEGY

“School readiness” describes the capabilities of **children**, their **families**, **schools**, and **communities** that will best promote student success in kindergarten and beyond.

Each component – children, families, schools and communities – plays an essential role in the development of school readiness.

No one component can stand on its own.

Virginia’s Definition of School Readiness

**A SMART INVESTMENT**

# THE NEED FOR INVESTMENT

## 76,316 children under the age of 5 in Fairfax County

**15,721** (20.6%) children under the age of 5 living below 200% federal poverty level

- **6,181** (8.1 %) children under the age of 5 living below 100% federal poverty level

## Currently Serving

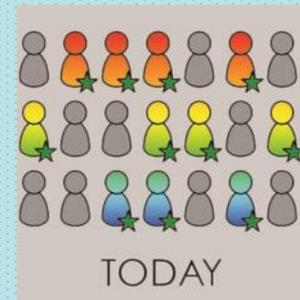
**2,608** children under the age of 5 in County/FCPS funded slots

**2,319** children under the age of 5 in the Child Care Assistance and Referral (CCAR) program

## Waitlist

**1,444** children under the age of 5 on CCAR waitlist

**427** children on PreK waitlist



**A SMART INVESTMENT**

# THE NEED FOR INVESTMENT

**2,078** (16.7%) kindergartners did not meet the FCPS fall reading intervention benchmark and referred for services in SY15-16

**1,429** (11%) of children entering kindergarten did not have a preschool experience in SY15-16

- **957** (67%) of children who identified as not having a preschool experience are also English Learners identified in SY15-16
- **857** (60%) of children who identified as not having a preschool experience are also receiving free and reduced meals in SY15-16

**A SMART INVESTMENT**

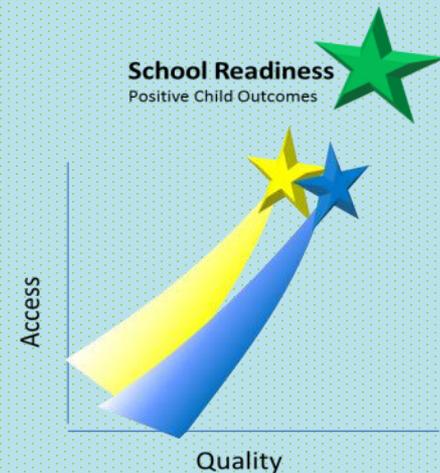
# SCYPT'S MULTI-YEAR PLAN

The plan's goals and priorities include:

- Emphasis on quality and access
- Continuum of programs supporting school readiness
- Mixed delivery system which meets family needs, helps address the number of children to be served and supports public-private partnerships



**A SMART INVESTMENT**





# FUTURE INVESTMENT

## VISION

All **children** have equity of opportunity and outcomes which ensure that they enter kindergarten with optimal social emotional, cognitive and physical development.

**Families** have the supports they need and access to community and school resources.

**Community** is a network of integrated, comprehensive services for all.

Families, community and **schools** partner in support of children's success.

## PATHWAY

Develop a strategic plan that supports equitable access to high-quality early childhood learning and development programs.

**A SMART INVESTMENT**



# OPPORTUNITIES FOR INCREASING ACCESS

Community and school sites that could provide early childhood programs and offer a broad array of family centered services.

## **Short-term with minimal renovation**

- Old Annandale Elementary School
- Alan Leis Center

## **Mid-term with renovation**

- Old Mount Vernon High School
- Braddock Glen
- Graham Road
- Lake Anne Professional Building

## **Longer-term**

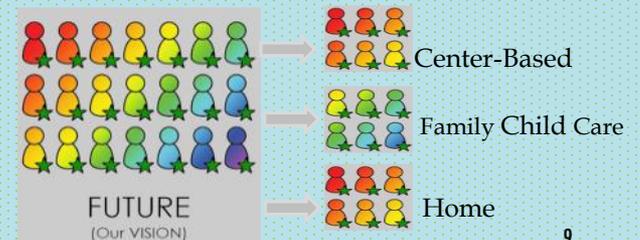
- Willston Center
- FCPS sites in Herndon, Falls Church and Alexandria

**A SMART INVESTMENT**

# RECOMMENDATIONS

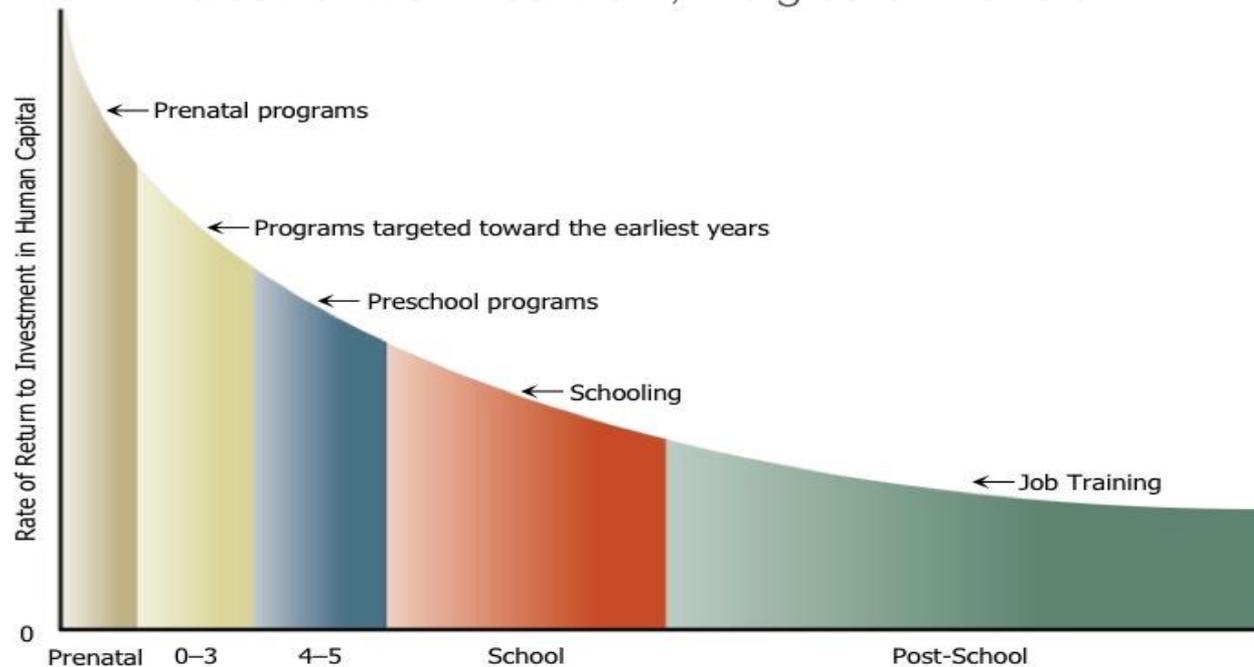
- Continue and fund strategies of existing SCYPT multi-year plan endorsed in 2013. The plan includes:
  - Developing an integrated early childhood longitudinal data system
  - Identifying space for place-based coordinated services for children and families
  - Enhancing quality:
    - Virginia Quality Initiative
    - Coaching and professional learning for early childhood educators
  - Expanding Neighborhood School Readiness Teams
  - Increasing access through CCAR and VPI
- Pursue and fund additional mixed delivery sites
  - Serving additional children (approximately \$15,000 per three/four year old or \$1.5M per 100 children)
- Engage in implementation of the school readiness strategic plan

**A SMART INVESTMENT**



# EARLY CHILDHOOD DEVELOPMENT IS A SMART INVESTMENT

The earlier the investment, the greater the return



Source: James Heckman, Nobel Laureate in Economics

# A Study in Contrasts: Why Life Expectancy Varies In Northern Virginia

A Report by the Center on Society and Health  
Virginia Commonwealth University

Supported by the Northern Virginia  
Health Foundation

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Derek A. Chapman, PhD

Jong Hyung Lee, MS

Lauren Kelley, MPH

Steven A. Cohen, DrPH, MPH

# Introduction

Northern Virginia is among the healthiest places in the United States. Arlington County, Fairfax County, Loudoun County, Prince William County, and the cities they surround — the area of focus for this report—rank among the healthiest areas in the Commonwealth of Virginia, and in the United States (table 1). But a closer look at the region paints a more nuanced picture. The health of residents of Northern Virginia is not uniform. County or city averages do not describe how greatly health varies across neighborhoods. **Life expectancy at birth—the number of years an average newborn can expect to live—varies by as many as 13 years across Northern Virginia, and the same is true for other measures of health for children and adults in this area.**

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## Why Neighborhoods Matter

What explains the large inconsistencies in health across Northern Virginia? Why are babies born in some neighborhoods—separated by only two or three miles—facing shorter lifespans than newborns in other areas? Five factors that matter most are: health care, individual behaviors, socioeconomic circumstances, the environment, and public policies and spending.

### Health Care and Individual Behaviors

Everyone knows that health is affected by health care, but did you know that the care we receive from doctors and hospitals accounts for only about 10 to 20 percent of health outcomes?<sup>1</sup> Far more important are our individual behaviors, such as whether we smoke or exercise. Our health habits account for about 30 to 40 percent of health outcomes.<sup>1</sup>

But our ability to obtain good health care or maintain healthy habits are not always matters of personal choice. Even with the best intentions to lose weight or exercise, success often depends on factors outside our control, such as socioeconomic circumstances and the environment.

### Socioeconomic Circumstances

In today's world and especially in Northern Virginia, people without a college education are at a disadvantage in finding good jobs and earning salaries to meet living expenses, let alone care for their health. Workers without a high school diploma fare even worse; their families often struggle to pay for housing, transportation, and child care.

Throughout the United States, tightening economic conditions have created pockets of poverty in suburbs that were

1. <http://www.county-healthrankings.org/sites/default/files/differentPerspectivesForAssessingWeightsToDetermineHealth.pdf>

once considered affluent, and Northern Virginia is no exception. People with small paychecks and multiple jobs find it difficult to stay healthy. Copayments and medication may cost too much. Cheap calorie-dense foods fit tight budgets better than expensive fresh produce. There is too little money for gym memberships and too little time for exercise. Economic pressures can incite stress, family turmoil, depression, substance abuse, and even violence. The stresses can affect anyone, but the economic pressures are greatest for people of color (e.g., African Americans and Hispanic Americans) and the many immigrants in the region.

### The Environment

As the maps in this report show, place matters greatly to our health. It's not just the education or finances in our households but the conditions in our neighborhoods that shape our health. In Northern Virginia—a suburb designed for cars and not for walking or cycling to work or school—physical activity was not initially considered. Motorists sit immobile for long hours on congested highways. Northern Virginia has excellent bike paths and beautiful parks, but not everyone in the area can enjoy them. Children in low-income areas may lack access to a playground or even a sidewalk. It can be unsafe for parents to let children play outside. Fast food outlets can

Location	2012	2013	2014	2015	2016
Arlington County	2	3	3	1	3
Fairfax County	1	1	2	3	2
Loudoun County	3	2	1	4	1
Prince William County	11	10	8	11	9

Source: County Health Rankings, Robert Wood Johnson Foundation

### Methods

This analysis, conducted by the Center on Society and Health at Virginia Commonwealth University, examined life expectancy at the census tract<sup>2</sup> level for each of four counties (Arlington, Fairfax, Loudoun, and Prince William) and for the cities in the region (Alexandria, Falls Church, Fairfax, Manassas, and Manassas Park). To accurately calculate life expectancy, the researchers pooled mortality data over 14 years (2000-2013), obtained from the Virginia Department of Health, and population estimates for five years (2004-2009), obtained from the U.S. Census Bureau's American Community Survey. The data in this report about demographics, income, and other socioeconomic variables are not the most recently available; this was intentional so as to align the socioeconomic data with the midpoint of the years for which the life expectancy estimates were derived. Most of the deaths were geocoded by the Virginia Department of Health based on year 2000 Census boundaries. For consistency, we applied year 2000 boundaries (rather than year 2010) for more recent deaths. Further details on the methods, including a summary of how life expectancy is calculated, are available in the appendix. The appendix also includes full-page maps that depict the range in life expectancy for the region, along with maps on race-ethnicity, education, and income. Individual maps for each city and county are available online at [novahealthfdn.org](http://novahealthfdn.org).

2. We use census tracts in this report, which are generally smaller than zip codes, to "zoom in" on differences across neighborhoods separated by short distances. A census tract is a relatively small statistical subdivision of a county that is defined by the U.S. Census Bureau and updated before each decennial census.

outnumber supermarkets. In low-income communities where property taxes are low, social services are limited and local schools lack the sports facilities and turf fields that well-funded schools enjoy.

3. Pietila A. *Not in My Neighborhood: How Bigotry Shaped an American City*. Chicago: Ivan R. Dee, 2010.

People of color and the region's immigrants often feel socially isolated, and the experience of residential segregation and discrimination can independently affect health.

### **Public Policy and Spending**

The above conditions did not come about by chance; they are the consequences of past and present public policy and spending decisions. For example, "redlining" decisions and housing covenants that began in the 1930s restricted home loans to African Americans and served to segregate people of color in certain areas, thereby setting off a cycle

of disinvestment by government and business and persistent poverty that gave rise to today's "bad neighborhoods."<sup>3</sup> Today's elected officials and business leaders choose whether to perpetuate or break this cycle by deciding whether to bring economic development into low-income communities and by how they set county and city budgets for social services, Community Services Boards, and education. Businesses create job opportunities by choosing where to locate. Decisions by Metro and other transit agencies affect whether low-income residents can reach good jobs, doctors, and child care.

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## **An Example**

4. Arlington County, Profile 2013. <https://arlingtonva.s3.amazonaws.com/wp-content/uploads/sites/31/2014/03/Arlington-Profile-2013.pdf>

Arlington County is one of the nation's wealthiest counties. In 2009, the year for this analysis, median household income was \$93,806 in Arlington County, compared to \$51,425 for the United States. Arlington County boasts one of the most educated populations in the country.<sup>4</sup> But even here, certain neighborhoods stand out for their disadvantages, where residents do not enjoy the wellbeing and economic vitality for which Northern Virginia is known. Some neighborhoods have suffered for generations from cycles of poverty perpetuated by policies of disinvestment. Their residents and their health have been affected by urban planning decisions, such as routing highways through neighborhoods to improve traffic

flow to help Federal workers commute more easily to distant suburbs, and the construction of high-end condominiums to attract well-paid government officials to live close to the urban core. Alongside such gentrification comes pockets of poverty, where the demographic profile of residents and the economic health of the neighborhood differ starkly from those of the county overall.

Consider Columbia Heights, a neighborhood in Arlington County. In census tract 1022, situated just north of the intersection of Columbia Pike and Carlin Springs Road and northeast of Bailey's Crossroads (figure 1), residents are largely Hispanic

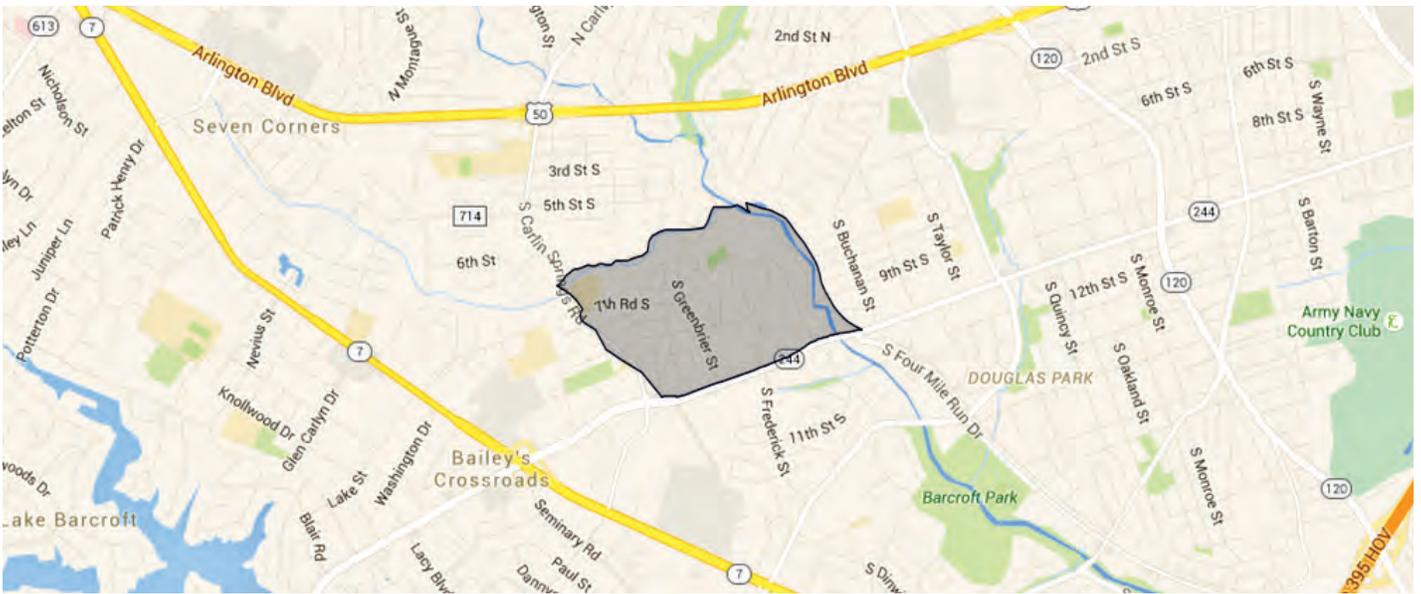


Figure 1. Census Tract 1022 in Columbia Heights, Arlington County

(67.5%). Non-Hispanic whites represent only 15.1% of this census tract. Spanish is spoken in 51.1% of households. Many residents have South American (20.3%) or Sub-Saharan African (9.8%) ancestry, more than in nearly any other area of the nation. Fully 13.5% of residents (age 5 and older) speak African languages.<sup>5</sup>

In this census tract only four miles from the Pentagon, the poverty rate is 23.9%. Median household income is \$49,743. A stunning 42.5% of children and teens below age 18 live in poverty. They are residents of a very highly educated county, yet only 65.8% of adults in this census tract have graduated from high school. Living in a county with an unemployment rate of 3.3%, 8.6% of residents in this census tract are unemployed. Those who are employed are more likely to work in sales/service (30.2%)

and manufacturing/labor (26.5%) than higher-wage fields.<sup>5</sup> Almost one household out of every four (23.8%) is headed by a single female. The housing stock is generally older, built between 1940 and 1969. The neighborhood is dominated by big apartment buildings and high-rise complexes, making it more densely populated than 95.7% of neighborhoods in the U.S. (22,623 people per square mile<sup>5</sup>). Home ownership is beyond the means of many residents; 13.2% of homes are vacant.

Neighborhoods like these exist across Northern Virginia. There are census tracts in Alexandria where more than 20% of homes are vacant. Throughout the United States, suburbs are witnessing a resurgence in poverty, brought about by shifting demographics in an economy that has not favored the middle class, and a delayed recovery from the 2007 recession.<sup>6</sup>

5. Neighborhood Scout. Arlington, VA (Columbia Heights/Parkglenn) (website). Accessed 5-11-16 at <http://www.neighborhoodscout.com/va/arlington/columbia-heights/>
6. Kneebone E., Berube A. *Confronting Suburban Poverty in America*. Washington, DC: Brookings Institution, 2014.

# The Effect On Health

7. Evans BF, Zimmerman E, Woolf SH, Haley AD. *Social Determinants of Health and Crime in Post-Katrina Orleans Parish*. Virginia Commonwealth University Center on Human Needs, 2012.

The economic and social marginalization of the people and neighborhoods in our area have great implications for the health of all Northern Virginia residents and their children. Mirroring the growing income inequality in the region, health is not shared equally across neighborhoods. The maps at the

end of this report (see appendix) depict stark differences in the region's counties and cities. Although life expectancy for the overall region is generally good (84 years)—much higher than in the core of many U.S. cities, where life expectancy often falls below 70 years<sup>7</sup>—life expectancy is not favorable for everyone.

**The bottom line? Our children's health depends on our address. Babies born in one part of Northern Virginia experience shorter lives than those born a short distance away.**

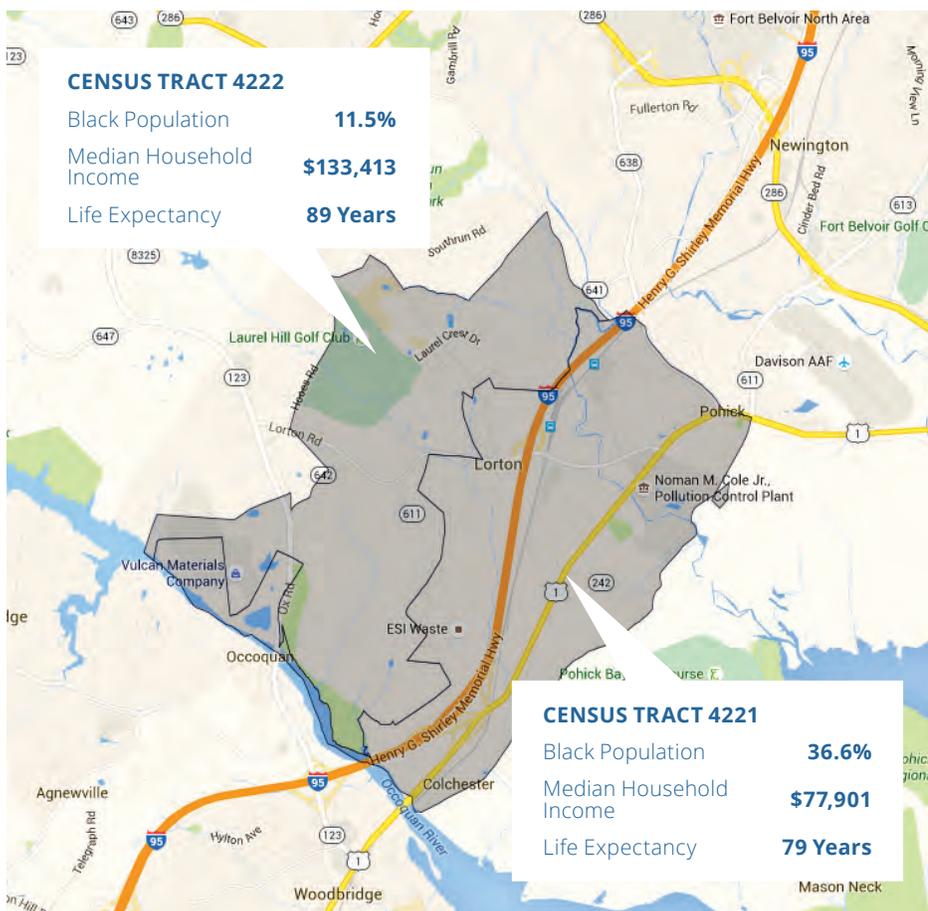


Figure 2. Western Lorton (census tract 4222) and Eastern Lorton (census tract 4221) in Fairfax County, VA

Source: U.S. Census Bureau; American Community Survey, 2009 American Community Survey 5-Year Estimates, generated using American FactFinder; <<http://factfinder2.census.gov>>.

## Demographics and family economics matter

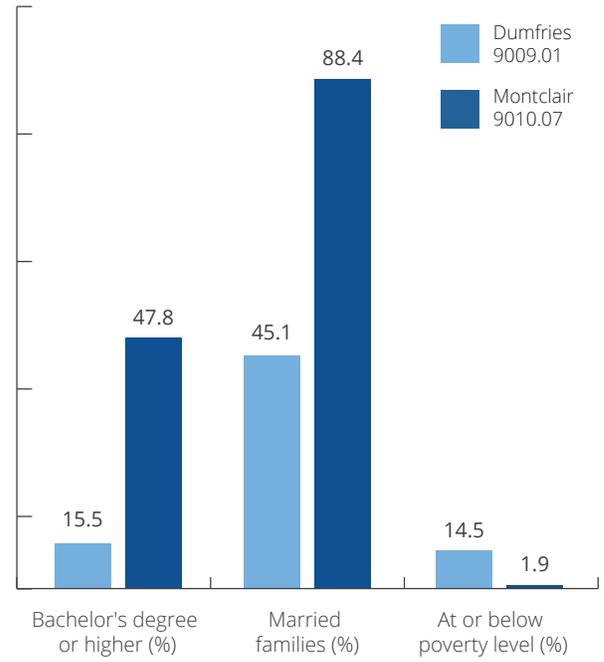
Motorists on northbound Interstate 95 who enter Fairfax County from Prince William County encounter a 10-year gap in life expectancy at their first exit. Babies born a few miles off the highway, in census tract 4222 in western Lorton, can expect to live an average of 89 years. Babies born closer to the highway, in census tract 4221 in eastern Lorton, can expect to live only 79 years (figure 2). Babies born in Manassas can expect even 13 fewer years; their life expectancy is 76 years. These large differences in life chances mirror geographic disparities in socioeconomic status and often reflect the presence of minorities with poorer access to economic and health care opportunities. In census tract 4222 in western Lorton, median household income is \$133,413 per year and blacks account for only 11.5% of the population, whereas blacks represent 36.6% of the population in census tract 4221 in eastern Lorton and median household income is only \$77,901 per year.

Figure 3. Dumfries (census tract 9009.01) and Montclair (census tract 9010.07) in Prince William County

Source: U.S. Census Bureau; American Community Survey, 2009 American Community Survey 5-Year Estimates, generated using American FactFinder; <http://factfinder2.census.gov>.



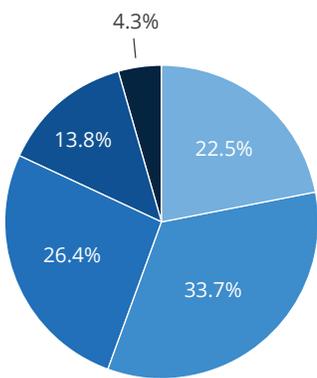
### DEMOGRAPHIC CHARACTERISTICS



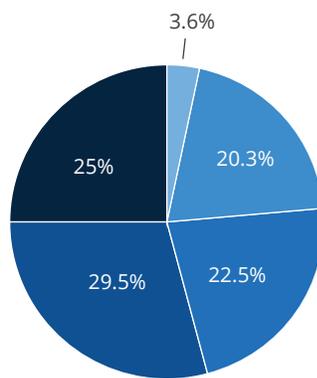
### LIFE EXPECTANCY



### EDUCATIONAL ATTAINMENT



Dumfries 9009.01



Montclair 9010.07

- Less than high school
- High school
- Some college, no degree
- Associate or bachelor's degree
- Graduate or professional degree

Not surprisingly, these differences extend well beyond differences in income.

Poverty rates differ, as do the percentage of adults with a college education, but the differences extend to family structure and the ability of parents to launch their children on a path for success. In Prince William County, life expectancy is 77 years in census tract 9009.01 (Dumfries) but seven years longer for babies born on the west side of Interstate 95 in census tract 9010.07 (Montclair). As shown in figure 3, the percentage of families headed by married couples is almost twice as high in the healthier census tract, and the percentage of adults with a Bachelor's degree or higher education is more than three times as high. A variety of economic factors and societal trends have contributed to the growth in single-parent households,<sup>8</sup> but the economic pressures to make ends meet are enormous, especially amid the high cost of living in Northern Virginia, and more middle class

families are falling into poverty. In census tract 9009.01, where life expectancy is seven years shorter, the poverty rate is seven times higher than in tract 9010.07.

### **Immigration matters**

Recent decades have witnessed a dramatic influx of immigrants that has changed the demographic profile of Northern Virginia.<sup>9</sup> Many areas with concentrated immigrant populations are facing difficult economic challenges and poorer health, sometimes only blocks away from more established, affluent neighborhoods.

Consider the contrasts that exist on opposite sides of Exit 4 on Interstate 395 (Shirley Highway) in Alexandria (figure 4). Life expectancy in two census tracts (2002.02 and 2001.05) differs by five years (84 versus 79 years). In the healthier census tract in Seminary Hill, south of Exit 4, households earn an average of \$186,705 per year. Only 9.6% of residents are foreign-born, and even fewer (4.5%) are black. To the north of Exit 4 is census tract 2001.05 in Beauregard, where the median household income is only a quarter that of the other tract (\$44,624) and the percentage of adults with no education beyond high school is more than five times higher (28.4%). Here, more than half (51.2%) of residents are foreign-born, and the black population is almost 12 times higher (52.8%). Paradoxically, some immigrant neighborhoods enjoy relatively good health despite these higher risks (see box to the left).

9. Bello M, Overberg P. Growing pains: multicultural explosion rattles residents. Rapid growth in ethnic mix outside D.C. is a trend that's sweeping the country. *USA Today*, 2014.

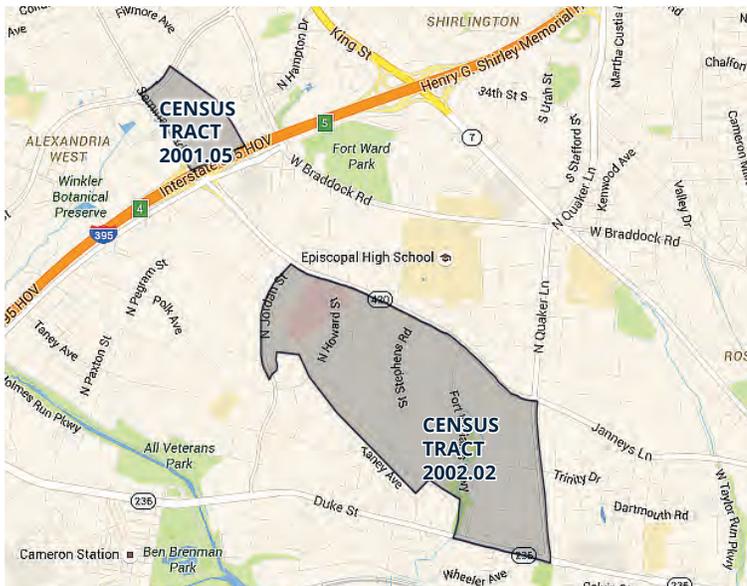
8. Cherlin AJ. *Labor's Love Lost: The Rise and Fall of the Working-Class Family in America*. New York: Russell Sage, 2014.

### **The Immigrant Paradox**

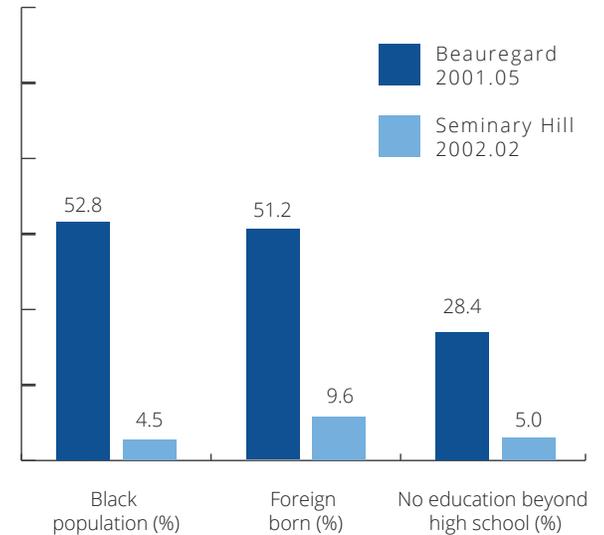
Recent immigrants (e.g., those having entered the country in the last 10 years) often enjoy better health than second- and third-generation immigrants and people born in the United States. There are a variety of reasons, including the possibility that new immigrants may not yet have adopted unhealthy American habits. In what is described as the Hispanic Paradox, Hispanic and Latino Americans often have poor educational status and lower incomes but higher life expectancy and lower rates of certain diseases than non-Hispanic persons. This phenomenon also occurs in Northern Virginia. For example, Columbia Heights census tract 1022, featured in figure 1, is one of the poorest areas of Arlington County but has one of the highest life expectancies in the county (83 years). More than two out of three (67.5%) residents are Hispanic, and 45.8% are foreign-born.

Figure 4. Seminary Hill (census tract 2002.02) and Beauregard (census tract 2001.05) in Alexandria

Source: U.S. Census Bureau; American Community Survey, 2009 American Community Survey 5-Year Estimates, generated using American FactFinder; <<http://factfinder2.census.gov>>.



### DEMOGRAPHIC CHARACTERISTICS



### LIFE EXPECTANCY



### MEDIAN HOUSEHOLD INCOME



### Place matters

A growing body of research shows that place matters greatly to our health. Local context helps explain why babies born just a few miles apart can face vastly different chances of living a long and healthy life. In a pattern seen across America—in big cities, small towns, and rural areas—health varies because of conditions in our neighborhoods:

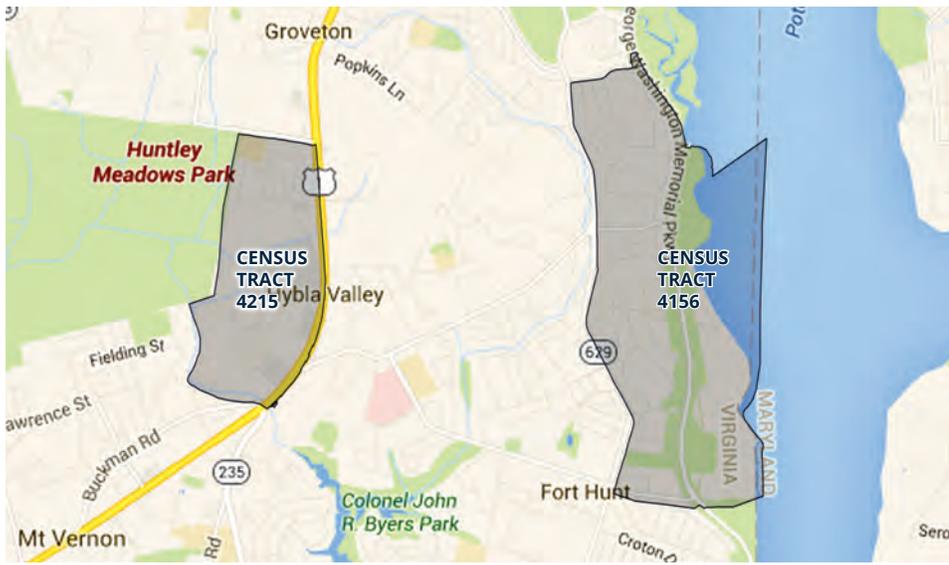
- **Education and income** are directly linked to health; communities with weak tax bases cannot support high-quality

schools and jobs are often scarce in neighborhoods with struggling economies.

- **Unsafe or unhealthy housing** exposes residents to allergens and other hazards like overcrowding.
- **Stores and restaurants selling unhealthy food** may outnumber markets with fresh produce or restaurants with nutritious food.
- **Opportunities for residents to exercise, walk, or cycle** may be limited and some neighborhoods are unsafe for children to play outside.

- **Proximity to highways, factories, or other sources of toxic agents** expose residents to pollutants.
- **Access to primary care doctors and good hospitals** may be limited.
- **Unreliable or expensive public transit** can isolate residents from good jobs, health and child care, and social services.
- **Residential segregation and features that isolate communities** (e.g., highways) can limit social cohesion, stifle economic growth, and perpetuate cycles of poverty.

Figure 5. Hybla Valley (census tract 4215) and Fort Hunt (census tract 4156) in Fairfax County



Census Tract Number		4215	4156
Life Expectancy (years)		78	84
<b>CHARACTERISTICS OF PERSONS</b>			
Race / ethnicity	White (%)	18.2	95.7
	Black (%)	24.3	0
	Hispanic (%)	46.1	1.1
Immigration status	Foreign born (%)	44.2	10.7
	Citizenship since 2000 (%)	39.2	27.1
Education	No more than high school (%)	26.6	5.8
	High school or higher (%)	70.7	97
	Bachelors' degree or higher (%)	22.1	79.4
<b>CHARACTERISTICS OF HOUSEHOLDS</b>			
Heads of household	Married couple (%)	70.6	95.1
	Female-headed household (%)	24.2	3.7
Economic status	Median household income (\$)	45,572	163,750
	Below poverty level (%)	18.6	0
	Below poverty level, under age 18 (%)	26	0
<b>CHARACTERISTICS OF NEIGHBORHOODS</b>			
Local housing	Median home value (\$)	238,200	796,200
	Vacant homes (%)	5.8	0.9
Crime	Total arrests (Apr 1, 2015 - Apr 1, 2016)	520	35
	Assaults	97	1
	Sex offenses	9	1
	Robbery, burglary, larceny	315	9

In Northern Virginia, neighborhoods with poor health tend to be places with acute social needs. These are places where policy and smart urban planning can make a difference, where elected officials, community leaders, businesses, and residents have the chance to improve not only health but overall wellbeing by improving access to good schools, desirable jobs, affordable housing, transportation, green space, child and health care, and opportunities for social mobility so that parents can prepare their children for a better life. Residents of depressed areas need not travel far in Northern Virginia to find places that have it all. For example, places like the Williamsburg Village area of McLean (census tract 4709), which boasts a life expectancy of 87 years, is a affluent town with overabundant social and economic resources.

Figure 5 shows how scarce such resources can be in places like the Hybla Valley area of Fairfax County. Residents of census tract 4215, west of Route 1 (Richmond Highway), include more people of color, immigrants, single parents, and adults who lack education and income than do those living only two miles away in census tract 4156 in the Arcturus neighborhood of Fort Hunt, where waterfront homes look out on the Potomac River and the median housing value is \$796,200. These two census tracts vary not only in the socioeconomic status of residents and their households

Source: U.S. Census Bureau; American Community Survey, 2009 American Community Survey 5-Year Estimates, generated using American FactFinder; <<http://factfinder2.census.gov>>. Fairfax County Police (<http://www.fairfaxcounty.gov/policeevents/>)

but also in the environmental features of their neighborhoods, which can affect their health. For example, census tract 4215 in Hybla Valley lacks access to healthy foods.<sup>10</sup> Neighborhood crime and violence affect the physical and emotional health of residents, especially children. Research shows that the trauma of chronic exposure to violence affects children's brain development and physiology as well as their likelihood of

adopting risky adolescent behaviors to cope with stress (e.g., smoking, alcohol and drug use, sexual activity) and of developing diabetes, heart disease, and other ailments later in life.<sup>11</sup> Children in low-income communities like this one have greater exposure to violent crime. Figure 5 shows that arrests for assaults differed nearly 100-fold across census tracts 4215 and 4156 between April 2015 and 2016.

10. Defined by the U.S. Department of Agriculture as a census tract in which at least 500 people or 33% of the population live at least one-half of a mile from a supermarket, supercenter or large grocery store. <http://www.ers.usda.gov/data-products/food-environment-atlas/go-to-the-atlas.aspx>

The gap in life expectancy and other health outcomes in Northern Virginia, and elsewhere in the country, is only partly solved by wellness initiatives such as improving neighborhood resources for healthy eating and physical activity (such as access to fresh produce and pedestrian walkways) and tobacco control policies that discourage smoking. These efforts are essential, but real progress in addressing health inequities requires attention to the economic and social wellbeing of residents and their communities. Meaningful change to the statistics in this report requires policies to improve early childhood education, enhance educational outcomes in secondary school, and make upward mobility (such as a post-secondary education) more accessible and affordable across social classes. Education and economic policies are health policies. Health is shaped by job training and other solutions to address unemployment

and fiscal instability for the area's families and by ensuring adequate mental health resources to help distressed families cope with stress, depression, and drug (e.g., opioid) addiction. Health is shaped by environmental policy and transportation infrastructure, access to affordable housing, land use and zoning decisions, and resources for the region's growing immigrant population.

None of these issues are new topics in Northern Virginia. Elected officials campaign on proposed solutions, and our local governments and businesses regularly debate strategies and budgets to address social and economic needs, transportation policy, and support for schools. The message conveyed in this report and depicted on these maps is that local decisions about social and economic policy and urban planning affect not only our pocketbooks, property values, and commuting time but also how long we live, how long our children

## The Policy Implications

11. Felitti VJ, Anda RF, Nordenberg D, Williamson DF, Spitz AM, Edwards V, Koss MP, Marks JS. Relationship of childhood abuse and household dysfunction to many of the leading causes of death in adults: the Adverse Childhood Experiences (ACE) study. *American Journal of Preventive Medicine* 1998;14:245-58.

will live, our health and quality of life, and what employers and government must pay for health care.

These policies tend to be focused on in silos by local governments and interest groups, but recognition is growing that meaningful change requires coordinated solutions across sectors and that a variety of stakeholders can share in the return on investment. The economic implications of poor health are a good example. The diseases that are driving up our health care costs are caused by the conditions discussed in this report. And escalating health care costs are a major drain on our economy—driving up entitlement spending by the Federal government, forcing states to slash spending on education and other sectors to offset Medicaid costs, and generating enormous costs for employers, corporations, and their shareholders.<sup>12</sup>

This report focuses on life expectancy, but lifespan is only one measure of health; we all want to live long lives but we also want to do so in *good health*, free of ailments and disability. Life expectancy is used here as a proxy for other health measures because what shapes life expectancy tends to also shape our risk of diseases, such as heart disease and diabetes; the health of infants, children, and teens; and even our risk of fatal injuries, from car accidents to homicides. Across the spectrum

of health, the wellbeing of everyone in Northern Virginia depends on the policy decisions we make, especially those affecting the neighborhoods of greatest need identified in this report.

We live in a time of growing unrest about social and economic inequality.<sup>13</sup> There is greater concern about the gaps in opportunity available to people of color and the poor, and the stark reality that the American dream is inaccessible to some Americans. The maps in this report show that these problems exist in our own back yard. A different future awaits children born blocks apart in Northern Virginia. Metro stops and interstate exits separate the haves and the have nots of our region. The pockets of poor health and economic marginalization in our midst are a threat not only to social justice but to the economic vitality of the region.

12. Johnson T. *Healthcare Costs and U.S. Competitiveness*. New York: Council on Foreign Relations, 2012.

13. Piketty T. *The Economics of Inequality*. Paris: Belknap Press, 2015.

# Appendix

## Methods

### Data Sources

Virginia Department of Health (VDH) mortality data for resident deaths occurring between January 1, 2000 and December 31, 2013 were geocoded based on the decedent's residence, and provided by the VDH Division of Policy and Evaluation, Office of Family Health Services. Fourteen years of deaths were used in order to minimize the number of tracts for which there were insufficient data to compute life expectancy.

U.S. Census Bureau population data (SF1, 100% data) from 2000 and 2010 were generated using American FactFinder (<http://factfinder2.census.gov>).

This project analyzed and reported all census tract data based on the 2000 vintage tract boundaries. Population estimates and death counts from newly created tracts in the 2010 census were converted back to their original tract boundary in the 2000 census (see

<https://www.census.gov/geo/maps-data/data/relationship.html> for the crosswalk file). This conversion retroactively to year 2000 census tract boundaries was necessary because some mortality data were coded using 2000 boundaries, while others were coded using 2010 boundaries. Data privacy concerns precluded our access to street addresses to geocode the data consistently, and we therefore used year 2000 boundaries for consistency.

### Life Expectancy Methodology

Life expectancy was calculated by census tract for Alexandria City, Arlington County, Fairfax City, Fairfax County, Falls Church City, Loudoun County, Manassas City, Manassas Park City, and Prince William County. Population data were calculated using a weighted average of 2000 and 2010 data obtained from the U.S. Census Bureau. The most recently available years (2000 to 2013) of geocoded mortality data from VDH were aggregated into 19 age groups (see list to the right) by decedent's residential census tract. The average number of deaths across the 14 years was computed in order to match the single year of population data (weighted average of 2000 and 2010) used. Death counts

and population data were then entered into abridged life tables using the Chiang methodology.<sup>14</sup> The death and population counts for age groups in a census tract with zero deaths were replaced with the corresponding death and population counts for the locality that contained that census tract. The following tracts were excluded from the analysis and marked as "insufficient data": census tracts with ten or more missing age categories; small population tracts (less than 5,000 people in either 2000 or 2010) having greater than 40% population change between 2000 and 2010; or tracts with greater than 40% population growth living in group quarters (e.g., nursing home, college dormitory, prison, etc.)

#### Life table age groups:

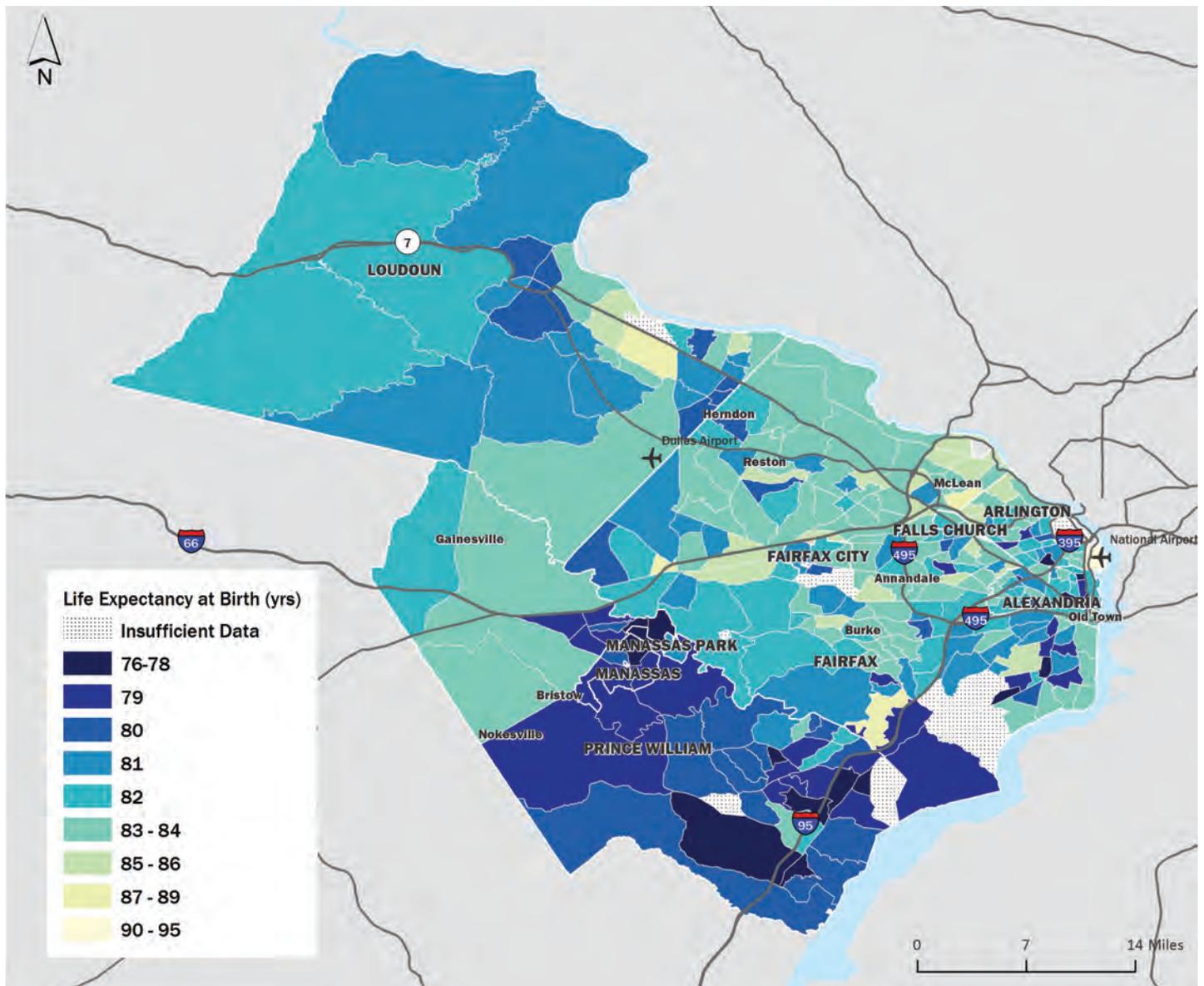
Less than 1 year  
1 to 4 years  
5 to 9 years  
10 to 14 years  
15 to 19 years  
20 to 24 years  
25 to 29 years  
30 to 34 years  
35 to 39 years  
40 to 44 years  
45 to 49 years  
50 to 54 years  
55 to 59 years  
60 to 64 years  
65 to 69 years  
70 to 74 years  
75 to 79 years  
80 to 84 years  
85 years and older

14. Chiang, CL. *The Life Table and Its Applications*. Malabar, Florida: Robert E. Krieger Publishing Company, 1984.

# Appendix

## Maps

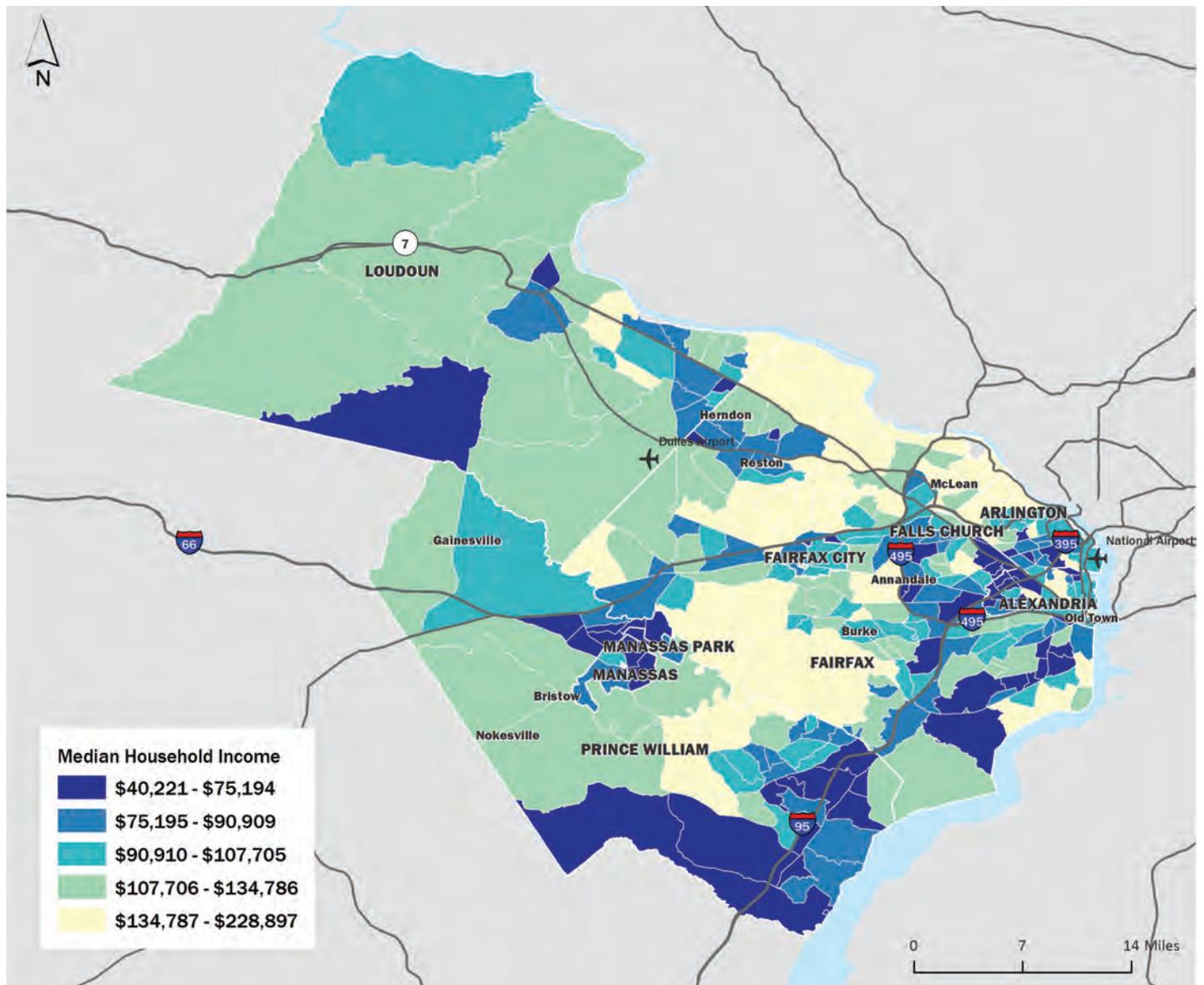
### Life Expectancy at Birth (years)



# Appendix

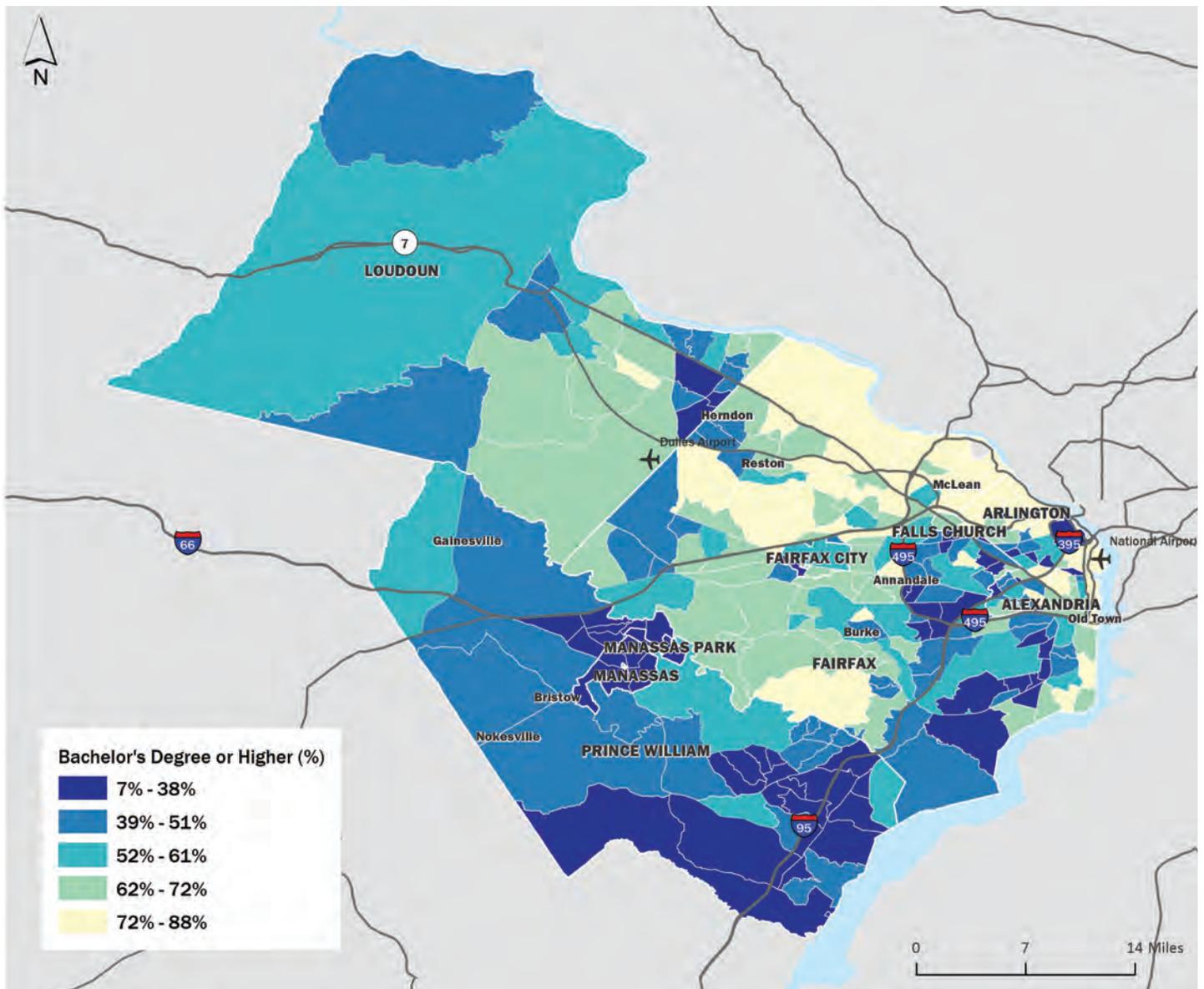
## Maps

### Median Household Income



# Appendix Maps

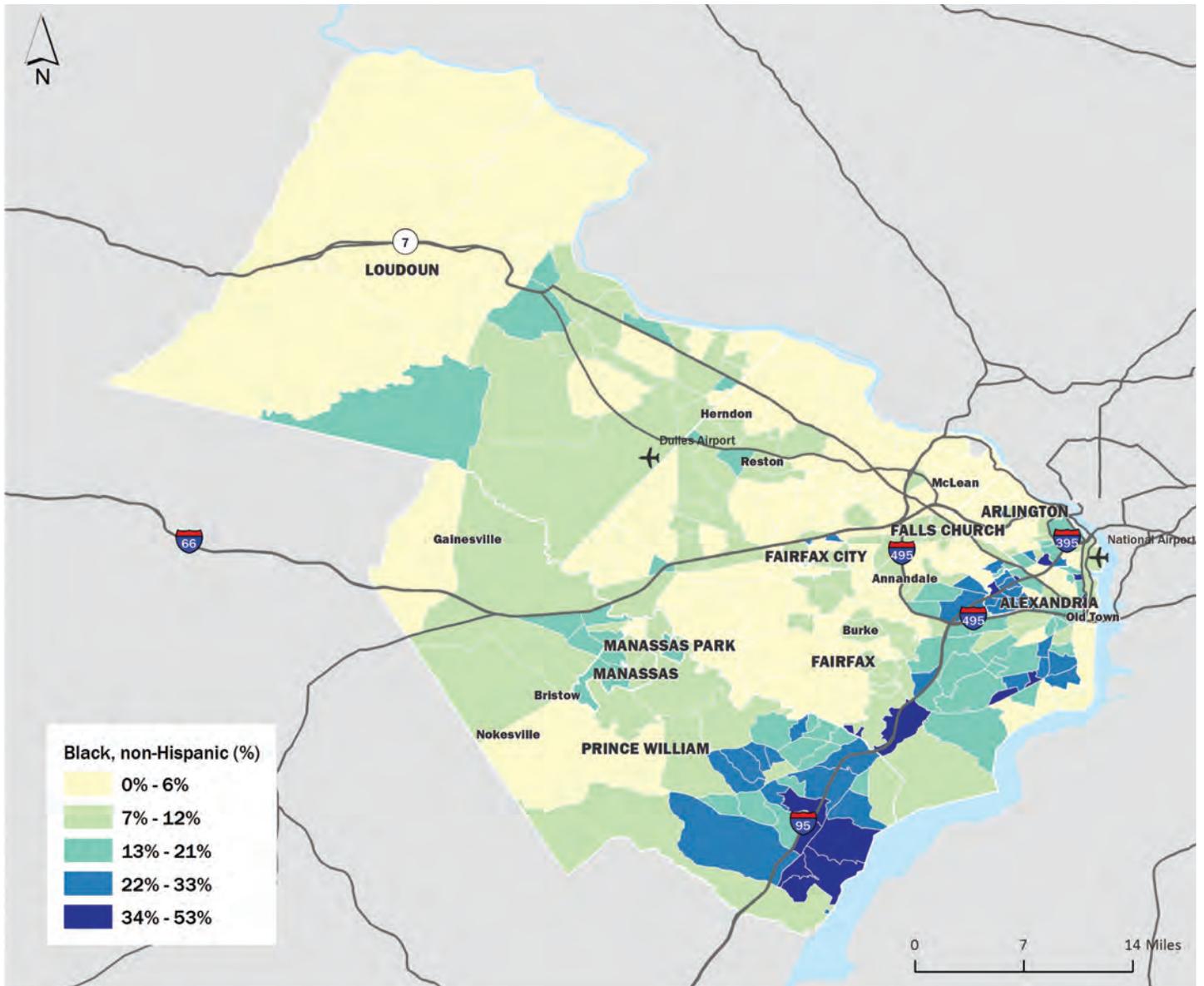
Population with Bachelor's Degree or Higher (%)



# Appendix

## Maps

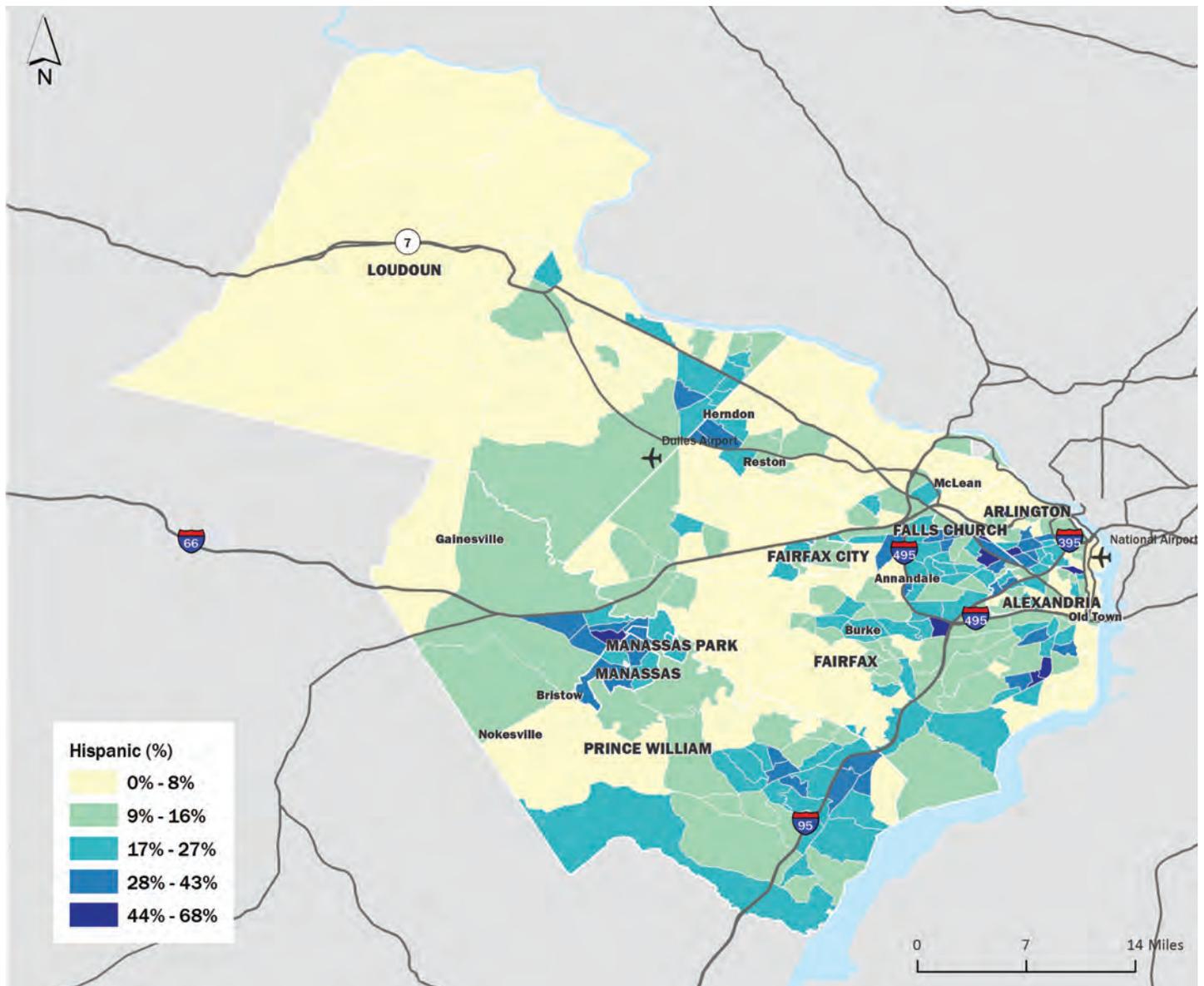
Black, non-Hispanic Population (%)



# Appendix

## Maps

### Hispanic Population (%)



Produced by The Center on Society and Health  
with the support of The Northern Virginia Health Foundation

# SOMERVILLE UNION SQUARE

STRATEGIC AND COMMUNITY BENEFITS PLAN  
FINAL REPORT

APRIL 2016



**LOCUS**



**Smart Growth America**  
Making Neighborhoods Great Together

## Acknowledgements:

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LOCUS

Chris Leinberger, President  
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Victoria Maguire, Massachusetts Director  
Kira Hibbert, Program Associate



Union Square Strategy Leaders

and

The Barr Foundation

## President's Message

LOCUS is pleased to submit the following report outlining the work completed by the City of Somerville Union Square Community and designated Strategy Leaders as part of the Union Square Strategic Planning and Community Benefits Process (the “community benefits process”). Throughout the process, LOCUS was continually impressed by the passion, dedication and wealth of knowledge that the members of the Union Square community brought to the process. It would be hard to find a more engaged citizenry to embark on this type of process and for that LOCUS is very grateful to have worked in partnership with such a dynamic group.

In addition, LOCUS would like to commend Mayor Joseph A. Curtatone and the City of Somerville staff who recognized the unique opportunity afforded by Union Square’s future redevelopment, and ensured that the dialogue regarding the social equity impacts of prospective development would be considered and prioritized as an essential part of the process. As a result of the City’s efforts to engage in this social equity and economic development discourse, the path forward for the City and this unique and vibrant neighborhood is being shaped by active neighborhood and citywide participation that in turn will help shape the area’s future.

The community benefits process to date has taken place over the course of roughly a year (from July 2015 through the present, March 2016) and has involved a significant amount of work by volunteer community members who represented a wide array of interests, backgrounds, and expertise. The participation of all Strategy Leaders provided a valuable dialogue about how the process should work and how to advance the articulation of a set of community benefits to ensure social equity is integrated into Union Square’s future. LOCUS believes the dialogue – even the difficult moments – between all community groups and individuals, over the course of this pilot was critical to ensure a well-balanced and thoughtful outcome. LOCUS is thankful for the participation of all involved.

LOCUS looks forward to taking the lessons learned from the Union Square Attainable Housing and Social Equity Initiative Pilot to determine ways to replicate the successful elements and make adjustments where needed to assist other communities working to ensure a balanced approach to economic development and social equity in their communities.

Sincerely,



Chris Leinberger  
President

LOCUS: Responsible Real Estate Developers



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## Introduction



The City of Somerville is on the brink of transformation. From 2012 to 2016, the community has embarked upon a major revitalization plan, developed a citywide comprehensive plan, and engaged in a neighborhood planning process that will create over 3-million square feet of new development opportunities in Union Square and Boynton Yards. Development of this scale presents a common dilemma for communities like Somerville who seek to preserve their local character and maintain affordability for their local residents and businesses.

After reading the [WalkUP Wake-up Call: Boston report](#), which revealed that the Boston region is poised to lead the nation in the expansion and creation of new walkable places, the Mayor and other City of Somerville representatives approached LOCUS in 2015. The discussion centered around a critical finding in the report that showed that it will become more difficult for communities to strike a balance between strong demand for walkable urban places, while maintaining affordability and accessibility, without equitable development strategies and tools in place.

Following this discussion, the City of Somerville was chosen as the first location to participate in LOCUS' Attainable Housing and Social Equity Initiative (AHSEI) pilot, a place-based method for developing and implementing effective community benefit programs as large-scale commercial development occurs around Somerville's incoming transit nodes—focusing on Union Square. The City believed that as a neighborhood on the cusp of major redevelopment, Union Square was uniquely suited to partake in the process to examine economic development, social equity impacts and to articulate a vision for community benefits that will help shape its future.

In addition to undertaking the LOCUS community benefits discussion in preparation for the new development, the Union Square community has a well-articulated City-wide 20-year Comprehensive Plan known as [SomerVision](#), and an intensive neighborhood-level planning and engagement process known as [Somerville by Design](#). The timing of both the neighborhood plan and the LOCUS community benefits discussion, created an opportunity to examine synergies between the two. The community benefits process looked further into issues that should be resolved through the City's regulatory processes and those for implementation by a potential place management organization, an already established community non-profit, and/or a community benefits agreement with a developer and/or an outside entity. The group explored how each process is connected to the whole of the community-driven efforts to redevelop Union Square according to shared community values to achieve a range of community benefits. The ability to review all the issues, at once, allowed greater flexibility for the Strategy Leader discussions and provided valuable guidance to the parallel processes in real-time. In this way, the LOCUS process not only fell sequentially into the years of community planning around Union Square but the interplay of ideas between the zoning and Neighborhood Plan components added another layer of

neighborhood-based input to the significant feedback provided by community members citywide through the preceding and parallel efforts.

## Project Area



The Union Square neighborhood is located just four miles north of downtown Boston and one and a half miles from Kendall Square. Within a two-mile radius, there are a surplus of world-renowned colleges, universities and hospitals. Within a three-mile radius, there are nearly three million jobs. Union Square is in a highly desirable location given its proximity to these regional assets.

Union Square is on the brink of transformation. In 2012, the Union Square Revitalization Plan (“Revitalization Plan”) was approved at both the city-and state-level. The Revitalization Plan identifies seven disposition parcels, collectively known as the “D-Blocks”, slated for redevelopment in accordance with Massachusetts General Laws Chapter 121B or other conventional market transactions. In accordance with the plan, the City, through the Somerville Redevelopment Authority (SRA), assembled land on the “D-2 Block” in Union Square to allow for the construction of a new Union Square MBTA Station.

In 2013, the City issued a Request for Qualifications (RFQ) seeking a Master Development partner for Union Square to redevelop seven D-Blocks as outlined in the Redevelopment Plan. In 2014, the Mayor called for volunteers citywide and then appointed a 20-member Civic Advisory Committee (CAC) representing a broad range of community members to serve as a public sounding board for the Union Square redevelopment process, providing feedback and input to help shape the strategic planning decisions and development in Union Square. In this role, the CAC, under the advisement of this LOCUS process, will prioritize components of a community benefits agreement between US2 and the SRA, addressing matters including but not limited to affordable housing, open space, mobility, civic space, job training and employment opportunities, support for local businesses, sustainability, and financial support of needed infrastructure improvements.

The CAC conducted the critical first step in the Master Developer selection process by reviewing all 10 applicants, narrowing down the options to the top two recommended development teams, and providing those two options for final selection to the SRA. Of the final candidates, the SRA selected Union Square Station Associates (US2) as its Master Development partner citing both the applicant's portfolio as well as their financial strength, giving them a greater financial cushion and thus likelihood of success even if market conditions were to deteriorate. US2 is now working collaboratively with the community on the various legs of the planning process and is a ready and willing partner to the Community Benefits Process that LOCUS' work will shape and advise.

## Goals of the Union Square Pilot Program

The Union Square AHSEI Pilot will serve as a national model for developing sustainable strategies that balance the demand for great walkable urban places with the need for jobs, housing, open space, diverse business opportunities, and transportation that are attainable and accessible to all Somervillians. While Union Square is the first pilot, LOCUS plans to work with a number of cities throughout the United States to develop individualized approaches for each community. And while Union Square is the first of these local pilots, the planning extends to other civic and transit development in a city with five to seven other transit stations. These approaches will include both public and private sector strategies for ensuring social equity as investment continues to pour in to the nation's walkable urban places. In each of its AHSEI pilot cities, LOCUS will help address the need for these places to provide, among other equity benefits, affordable housing, job opportunities and workforce training, local business support, and public spaces for the community to enjoy. In Union Square specifically, there will also be a focus on creating new open and green space, providing safe and accessible transportation alternatives and anti-displacement strategies as well as sustainability measures—among other needs as identified by the CAC, Strategy Leaders and community at large.

Ultimately, the LOCUS process will produce a place-based Strategic and Community Benefit Plan that includes a prioritization of community benefits and place-based strategies, which will provide the CAC with the community benefits framework necessary to advise the SRA on pending negotiations with US2. The LOCUS process is also considering the creation of a PMO whose ultimate structure and responsibilities are currently being discussed. Additional information regarding the Union Square Strategic Planning and Community Benefits Process can be found in Appendix E.

## Pilot Approach

The LOCUS Union Square Pilot was shaped by local conditions, local stakeholder participation, and the local neighborhood planning process. It also used national data from the WalkUP Wake-UP Call Reports that showed how the real estate market, in the United States, is shifting away from drivable sub-urban development patterns towards walkable

urban places, which has resulted in major impacts on social equity in local communities. The Pilot is designed to encourage community fingerprinting and ownership, while facilitating an action-oriented, data-driven conversation to define and prioritize community benefits. As a result, the local community not only knows what it wants, but has the tools and information needed to ensure the new development that will take place in the district over the next 30 years is designed to achieve their collective vision. Replicating this process in other transit neighborhoods should create a city-wide example of place management of benefits shared by public, private, non-profit, and community interests in both housing and other development models.

## Community Engagement

LOCUS recognized that engaging community members to create solutions to current issues was a critical step to ensuring that the needs and wishes of community stakeholders are fully deliberated, clearly formulated and incorporated into project decision-making. From the onset, LOCUS' pilot approach was threefold: inform, invite and communicate.

1. First, inform the general public of the purpose and progress of the LOCUS Attainable Housing and Social Equity Pilot program.
2. Second, invite all interested parties to participate in the strategic planning process. This was a critical step to ensure equal representation of the community and to be able to prioritize the needs, goals and opportunities of the project area.
3. Third, create a safe space for strategy leaders, the general public, affected agencies, and elected officials to communicate their perceptions, opinions and ideas throughout the entire course of the strategic planning process.

After refining an extensive list of community needs, LOCUS facilitated the development of a strategic plan for Union Square's future economic development and social equity. The strategic plan developed through this process includes a comprehensive inventory and prioritization of community benefits needs and opportunities that could be used to shape future public sector investments and policy changes, as well as shape community benefit agreements with other private development interests active in Union Square. In addition, the LOCUS process has begun conversations toward the creation of a place-based management organization by community stakeholders that could perform various functions related to community benefits including monitoring of the long-term implementation of those public and community benefit priorities, ensuring they are met and updated as needed.

This section of the report highlights all elements of the public process and summarizes the feedback received from the strategy leaders.

### Union Square Community Benefits Process

The Strategy and Community Benefits Process kicked off with a meeting on July 27, 2015,

held by the Union Square Civic Advisory Committee (CAC). It provided an opportunity for LOCUS to introduce the Attainable Housing and Social Equity Initiative (ASHEI) (for more information on the ASHEI, please see Appendix B). The meeting also featured a presentation by Chris Leinberger, President of LOCUS, who described the work Union Square's community leaders would be charged with. LOCUS' goal is to assist community leaders develop a clear vision of the community benefits needed to maintain the qualities and attributes of Union Square and develop actionable steps in the short, mid- and long term.

Over the course of two months, LOCUS met with several groups such as the Union Square Neighbors, Union United, CAC and Union Square Main Streets to receive feedback on the proposed strategy and community benefits process. LOCUS participated in discussions with community leaders who expressed a need to increase the number of community leaders who would be involved in the community benefits discussion. After an open call, a final list of 34 Union Square Strategy Leaders was chosen to represent a broad cross section of the Union Square community.

The list of the Strategy Leaders who participated in the process is included below:

- Joe Beckmann - Member of Union Square Civic Advisory Committee (CAC) and Sustainable Neighborhood Working Group. Co-founder of Progressive Democrats of Somerville.
- Tom Bent - Somerville's representative to the Metropolitan Planning Organization. Member, Somerville Chamber of Commerce. SomerVision Steering Committee. Local business owner, Bent Electric.
- Regina Bertholdo – Director, Parent Information Center. District Liaison for Homeless Students. Multilingual Services Coordinator. Member, Somerville Homelessness Task Force. Member, Somerville Family Learning Collaborative.
- Jennifer Blundell - Co-Chair, Union Square Civic Advisory Committee. Finance professional advising banks and investment firms, and Union Square resident.
- Rev. Ben Echeverria – Member, Union United. Acting Director, The Welcome Project. SomerVision Steering Committee, Tufts University Tisch College Community Research Center Co Chair, Community Organizer.
- Glen Ferdman - Director of Libraries, City of Somerville.
- Irma Flores - Member, Union Square Civic Advisory Committee. SomerViva Spanish Language Liaison. Former Somerville Public Schools family liaison. Community/parent organizer, Sociedad Latina.
- Bill Gage - Member, Somerville Redevelopment Authority Board of Directors.
- David Gibbs – Member, Union United. Executive Director, Community Action Agency of Somerville.
- Seth Grady – Representative, Union Square Partners LLC, owners of former Post Office building.
- Esther Hanig - Executive Director, Union Square Main Streets. Member, Union Square Civic Advisory Committee.
- Scott Hayman – Member, Union United. Staff, Somerville Community Corporation. Member, Union Square Civic Advisory Committee.

- Stephanie Hirsch - Lincoln Park Neighbors. Argenziano School Council. Data analyst. Union Square resident.
- Jennifer Lawrence - Former Director of Groundwork Somerville. SomerVision Steering Committee. Former Board President, Somerville Local First. Sustainability Planner, City of Cambridge.
- Patrick McCormick - Union Square resident and Civic Advisory Committee member, former City of Somerville CIO, former Board President Somerville Homeless Coalition.
- Patrick McMahon - Board Member, Planning Office for Urban Affairs. Staff, Federal Realty Investment Trust.
- Erik Neu – Graduate, Somerville Academy for Innovative Leadership (SAIL). Member, Union Square Civic Advisory Committee.
- Courtney O’Keefe – Representative, Somerville Local First. Member, Union Square Civic Advisory Committee.
- Philip Parsons – Principal, Parsons Consulting Group. Member, Union Square Civic Advisory Committee.
- Emily Reichart - Executive Director of Greentown Labs. Member, Union Square Civic Advisory Committee.
- Cheri Ruane - President, Boston Society of Landscape Architects. Union Square resident.
- Jhenny Saint-Surin – SomerViva Haitian Creole Language Liaison.
- Derek Seabury - Executive Director, Artisans Asylum.
- Renee Scott – Founding Member, Green and Open Somerville.
- Anne Tate - Architect and Professor at RISD. Co-Chair, Union Square Civic Advisory Committee.
- Ileana Tauscher – Associate, Urban Land Institute. Leadership Council Member, Peer Health Exchange.
- Frank Valdes – Member, AIA. Architect for SCC’s 181 Washington Street project. Walnut Street resident.
- Don Warner - Select Development Corporation. Owner, former Union Square police station. SomerVision Steering Committee.
- Benny Wheat - Steering Committee Chair, Union United.
- Wig Zamore - Co-Chair, Union Square Civic Advisory Committee. Mystic View Task Force. Somerville Transportation Equity Partnership. SomerVision Steering Committee
- Steve Mackey, Somerville Chamber of Commerce President, Ex-Officio
- Amanda Maher, Senior Economic Development Specialist, City of Somerville, Ex-Officio / Replaced by Sunayana Thomas, Senior Economic Development Planner
- Ward 3 Alderman Bob McWatters, Ex-Officio
- Ward 2 Alderman Maryann Heuston, Ex-Officio

## **Union Square Strategy and Community Benefits Session 1**

The Union Square Strategy Leaders group met for the first time on November 18, 2015. In an 8-hour live stream session conducted by LOCUS, the Strategy Leaders, City staff and over 40 members of the general public came together to begin the community benefits discussion process. This session was the critical first step to introduce the different members of the Union Square community to each other, provide an opportunity for all members of the group to identify what makes Union Square important to them and ask, “What makes Union Square great?” Hearing everyone’s values and an overarching collective concern to protect Union Square’s unique qualities began establishing trust between the various community members. This initial step of the community benefits process served as the critical foundation for future discussions about the community benefit needs and trade-offs necessary to uphold Union Square’s unique character.

The first Union Square Strategy and Community Benefits Session also provided an opportunity for the group to get an update on the recently released Neighborhood Plan draft and accompanying fiscal analysis by the Somerville Planning Department. The session reviewed the Union Square Briefing Book containing a summary of the history of Union Square’s development and the important neighborhood planning work that had been done to date and that LOCUS would build upon. Finally, the day-long meeting was an opportunity for Chris Leinberger to give an overview of place management strategies, and best practices from across the United States. LOCUS then provided a set of “strategy card” samples to each Strategy Leader. These cards outlined a variety of elements/issues – such as housing, retail, place character, employment, economic development, et al. – that they could use to spur the creation of new strategy cards applicable to this unique community and neighborhood that would be considered to become part of the plan to develop a realistic and actionable place-based strategy for Union Square, and inform a comprehensive community benefits program.

The template strategy cards were made available for editing online via a Google doc hosted on the CAC website, allowing strategy leaders and the public to view, provide input, and edit the cards.

In the weeks following the November meeting, the Strategy Leaders developed their individual set of strategy cards, with assistance and input from their relevant stakeholder interests and the broader community. That process allowed for a customized set of benefits to be considered. In total, the number of strategy cards was 51.

### **Strategy Leader Outreach and Feedback**

During the month of December, Strategy Leaders were asked to connect with members of the Union Square community, their neighbors, members of their organizations, or anyone else who could be considered a Union Square stakeholder. They were asked to use the revised set of Union Square specific strategy cards to discuss with their constituents the strategies that were to be prioritized as part of the community benefits process. Given the

broad makeup of the Strategy Leader group, the goal was to engage all sections of the Union Square community in the discussion and to discuss the priorities at the next Strategy Leader group meetings in January.

In addition to individual Strategy Leader outreach, the City, CAC and LOCUS co-hosted a public meeting on December 2 for members of the public to provide comment on the strategy cards and identify community benefit priorities. A second public meeting was co-hosted by the City's [Somerviva](#) Immigrant Outreach and Services program on Saturday, December 5, in four languages to gather feedback from the Spanish, Haitian Creole, Portuguese and English speaking members of the community. Several Strategy Leaders also volunteered to post their names and contact information to the [CAC's website](#) to be available to community members who may not have been able to attend the public meetings or could not be connected with a particular group but wanted to express their thoughts on the process by phone or by email.

LOCUS hosted two in-person and five conference calls throughout December and January for Strategy Leaders. These calls were established to provide an opportunity for Strategy Leaders to speak with Chris Leinberger as they gathered feedback and to ask questions or voice concerns as they came up throughout the month. LOCUS found it was helpful to have a way to check in with Strategy Leaders to hear their concerns regarding several issues including how to address new issues not reflected in the strategy cards as well as how the community benefits process intersected with other City planning efforts.

### **Strategy Card Submissions**

Strategy Leaders were asked to submit their refined list of Strategy Cards by December 30, 2015. The goal was to allow LOCUS to consolidate all Strategy Leader feedback and prepare for the January 2016 Strategy Leader sessions. In total, out of 30 Strategy Leaders, 23 submitted their selected cards in advance. These selections allowed LOCUS to work with Carson Bise from Tischler/Bise, a fiscal, economic, and planning consulting firm, to prepare a real-time fiscal analysis that included cost estimates for a number of the top issues as well as to present the Strategy Leader group with a summary to begin working from or adjust as needed. The issues that got the most attention during the early strategy card submissions included export, regional and local employment, affordable housing, green and open space, civic space and others.

### **Union Square Strategy and Community Benefits Session 2**

The Union Square Strategy Leaders reconvened on January 13, 2016, for the first time in a little over a month. All Strategy Leaders were asked to have identified their priority strategy cards and submit them to LOCUS in advance of the meeting.

The January 13 Session (or "Session 2") was structured to facilitate conversation between the Strategy Leaders regarding the community benefit priorities that they had submitted. Coupled with the in-person fiscal analysis modeling, the process was established to allow Strategy Leaders to weigh the benefits and trade off various community benefits. After

weighing the 51 strategy cards identified by strategy leaders in December 2015, the strategy leaders narrowed it down to 10 cards.

The 10 strategy cards that received the most interest from strategy leaders include:

1. Walkable Urban Character
2. Library/Community Center
3. Green and Open Space
4. Export Employment
5. Local Employment
6. Parking and Traffic Mitigation
7. Water, Sewer and Electric
8. Smart City Infrastructure
9. Low Income Housing
10. Local Serving Retail

*NOTE: Sustainability and Climate Change were mentioned as priority issue that should be incorporated throughout the strategies listed above. During the March 14th session, the Strategy Leaders created two additional working groups including sustainability/change.*

### **Union Square Strategy and Community Benefits Session 3**

On January 14, LOCUS refined and consolidated the strategy cards into the following seven priority categories based on feedback from the Strategy Leaders from Session 2:

1. Housing
2. Economic Development
3. Civic Space and Library
4. Parking and Transportation
5. Green and Open Space
6. Smart City Infrastructure
7. Place Management Organization (PMO)<sup>1</sup>

The Strategy Leaders were then asked to rank the seven strategy cards from highest priority to lowest priority. Their votes reflected the following:

- Priority 1: Economic Development
- Priority 2: Housing
- Priority 3: Green and Open Space
- Priority 4: Civic Space and Library
- Priority 5: Parking and Transportation
- Priority 6: Smart City Infrastructure

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<sup>1</sup> The Place Management Organization was inserted based on the Strategy Leader's discussions about the need to create a place-based mechanism that is both accountable to the local community and strategies.

It was noted at this time that sustainability was also a shared top priority but that it should be incorporated into every priority area rather than separated out.

*NOTE: Because PMO was on the agenda later in the evening, it was excluded from the ranking exercise.*

## **Working Groups**

Once the priorities were identified, members of the public and strategy leaders broke out into six working groups: Economic Development, Housing, Green and Open Space, Civic space and Library, Parking and Transportation and Smart City Infrastructure.

Each working group was charged to create goals, action items, the lead entity (City, PMO, or Local Organization) for implementation, and appropriate funding sources (City, CBA, or other). As the summaries of the working group findings were reported out to the larger audience, the Strategy Leaders agreed that each working group would need to meet again to further review and refine their respective priority issues before its inclusion in the final plan.

The last item discussed during Session 3 was the appropriateness of creating a Place Management Organization. Leinberger kicked off the discussion by stressing the importance of creating a new place-based entity or structure in Union Square that among other activities could become responsible for overseeing the implementation of the goals and action items articulated through the community benefits process.

According to the Strategy leader's priority forms that were submitted, there was a broad interest for a place management organization in Union Square that would play a significant role in implementing or monitoring the following priority issues: housing, civic space, programming of open space and parks, parking management, and infrastructure improvements.

Due to time constraints, it was recommended that Strategy Leaders and members of the public volunteer to participate in a working group to further the discussion of a potential place management organization. Given the overwhelming interest in the PMO discussion, it was decided to create an additional working group to develop recommendations that would be voted by all of Strategy Leaders rather than a subset. It was recommended that the members of the newly formed PMO working group meet more regularly than the other working groups to consider existing best practices that may serve as a model for the establishment of a place-based management organization.

At the meeting conclusion, the following seven working groups were established:

1. Economic Development
2. Housing
3. Green and Open Space
4. Civic Space/Library
5. Parking and Transportation

6. Smart City Infrastructure
7. Place Governance/Management Organization

### **Public Participation in Working Groups**

Many members of the general public who attended the January 13 and 14 sessions expressed an interest in being involved in future discussions around the priority areas. The working groups established at the end of session 3 were open to any public member who wished to be involved. While the Strategy Leaders and members of the general public of each of the working groups met in January and February, it is important to note that the Strategy Leaders were strongly encouraged to take the lead role within each of the working groups, as they were responsible for reaching out to the general public and their constituency to gather feedback throughout this process. The Strategy Leaders were asked to report back on the discussions and decisions made by the working groups and were asked to present their final results to the Strategy Leaders as a whole. This approach ensured a clear framework that allowed Strategy Leaders and the general public to participate and ensure their contributions were noted and reported back.

### **Union Square Strategy and Community Benefits Session 4**

Several Strategy Leaders expressed interest in keeping the momentum going and advancing the groups' work in a timeframe shorter than the originally proposed 3-4 months. As a result, LOCUS and the City worked together to facilitate a meeting in February.

On February 16, the Union Square Strategy Leaders, the Union Square Civic Advisory Committee and members of the public reconvened and presented their ranked list of action items, specific strategies, implementation organizations, initial partners and financial resources needed to help execute their goals. After each presentation, a brief question and answer session was held for meeting attendees to raise questions, problems or concerns. LOCUS made it clear that they will continue to work with the PMO working group by bringing in subject experts to enhance understanding, and provide background information on specific place management strategies, challenges and processes.

Each Working Group was asked to submit a report on March 14 that took a comprehensive approach to tackle their strategic issue rather than a case-by-case approach. Their reports must include a ranked list of actions, articulation of the appropriate implementation organization and appropriate funding sources.

The City also presented an update on their work concerning Union Square. It outlined a general timeline for the Green Line Extension (GLX), the neighborhood plan, Union Square's zoning, LOCUS' involvement, as well as the review period for the Community Benefits Agreement (CBA), Civic Advisory Committee (CAC), and Somerville Redevelopment Authority (SRA). The City also provided an overview of the next steps that will inform Union Square's community benefit process.

*NOTE: The ranking of each working group priorities was important component of the Pilot exercise to better understand any tradeoffs in order to determine the most critical set of actions needed to accomplish their short, mid- and long term strategic goals.*

### **Creation of Sustainability and Climate Change and Finance Working Group**

During the March 14<sup>th</sup> session, a subgroup of the Strategy Leaders decided to create two additional working groups that would focus on Climate Change/Sustainability and Finance. The goal of the Climate Change/Sustainability working group was to ensure that all practices from planning, through construction and implementation take into consideration environmental sustainability, reduction of carbon use, and preparation for future climate change. The Finance working group was charged with the responsibility of exploring funding sources that could be applied for and used to fund Union Square’s community benefits.

## **Draft Union Square Strategic Planning and Community Benefits Plan**

The following is the final outline of the Union Square Strategic Planning and Community Benefits Plan completed and reported out by the members of the each working group<sup>2</sup> on February 16, 2016:

### **Working Group Recommendations**

1. Economic Development
2. Housing
3. Green and Open Space
4. Civic Space
5. Parking, Transportation and Mobility
6. Smart City Infrastructure
7. Climate Change/Sustainability
8. Finance<sup>3</sup>
9. Place Management Organization

### **Economic Development Recommendations**

COMMUNITY PRIORITY: Develop Union Square/ Boynton Yards neighborhood into a significant employment center that supports and sustains diverse businesses in all stages

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<sup>2</sup> While the list of general public contributors on each working group is not exhaustive, LOCUS has made an effort to note those who have participated in the working groups.

<sup>3</sup> The Finance working group did not submit their recommendations and action plan by the publication deadline. LOCUS will work with the Finance working group to incorporate their findings into Phase 2 of the Union Square Strategic Planning and Community Benefit Process.

of growth, provides residents and local businesses with opportunities to work and grow, and create new commercial taxes that expand city services.

Each priority is ranked from highest priority (1) to lowest priority (3).

The working group identified the following key priorities and action items:

ECONOMIC DEVELOPMENT						
Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	
1	Attract and retain employers	City/PMO	<ul style="list-style-type: none"> <li>- Perform SWOT analysis</li> <li>- Research precedents</li> <li>- Establish a neighborhood director of economic development</li> <li>- Develop a tax incentive program for business that provides living wages, benefits and other worker rights.</li> <li>- Leverage proximity to Kendall Square and Boston</li> <li>- Invest in Infrastructure that attracts businesses</li> </ul>	TBD	TBD	TBD
2	Develop and maintain a high quality workforce	City/PMO	<ul style="list-style-type: none"> <li>- Implement high school and community college training programs</li> <li>- Pursue partnerships with area businesses and institutions to scale up effort</li> <li>- Build on existing workforce development programs such as the First Source Jobs Program and adjoining employment</li> <li>- Prioritize at-risk residents for additional training.</li> </ul>	TBD	TBD	TBD
3	Promote economic development of local and independent businesses.	City/PMO	<ul style="list-style-type: none"> <li>- Perform a threat assessment to understand greatest risks</li> <li>- Expand and strengthen technical assistance</li> <li>- Provide affordable spaces in the D blocks for selected incubator businesses and key current local serving businesses being priced out by increased demand</li> <li>- Conduct business and market gap analysis</li> </ul>	TBD	TBD	TBD
<b>TOTAL</b>					<b>TBD</b>	

Economic Development working group members:

Strategy Leaders: Tom Bent, Esther Hanig, Stephanie Hirsch, Steve Mackey, Erik Neu, Courtney O’Keefe, Emily Reichert, Don Warner and Wig Zamore. Other Contributors: Ian Adelman, Maria Fernanda, Katie Gradowski, Van Hardy, Meredith Levy Martinez, Karen Narefsky, Nick Schonberger and Bill Shelton.

## Housing Recommendations

COMMUNITY PRIORITY: To preserve and prevent the loss of attainable housing due to future development, the Housing working group identified key priorities and strategies to ensure that people of all incomes, races, and ethnicities can afford housing in Union Square neighborhoods, and that all people will have the freedom to choose when and where they move.

Each priority is ranked from highest priority (1) to lowest priority (6).

The working group identified the following key priorities and action items:

HOUSING						
Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	
1	Ensure the greatest level of housing preservation and production for extremely low income up to 170% of AMI.	PMO/City	<ul style="list-style-type: none"> <li>- Build staff capacity and financial resources of existing housing trust fund.</li> <li>- Create local policies to maintain affordability for current residents.</li> <li>- Conduct a vulnerable populations audit to measure impacts of Union Square re-development.</li> <li>- Obtain subsidy and loans from Union Square DIF.</li> </ul>	Somerville Housing Authority, Existing Housing Trust Fund; Private and non profit developers	5-6 months	TBD
2	Provide a good mix of housing that is attainable and will accommodate families' and senior needs.	Community Organization/ City	<ul style="list-style-type: none"> <li>- Obtain from US2 survey results of amenities needed for family housing</li> <li>- Determine the feasibility of a real estate transfer tax and Community Land Trust to use those proceeds to harness gentrification, reducing both commercial and residential displacement</li> <li>- Develop housing resources and assistance from local universities and colleges</li> <li>- Focus efforts and resources on acquiring and rehabilitating existing housing stock.</li> <li>- Provide up-zoning and density bonuses to developers in exchange for affordable housing.</li> <li>- Leverage State's 40R program</li> </ul>	City; PMO; Trust Fund (SHT); State	TBD	TBD

3	Promote home ownership and rental housing opportunities.	Community Organization	- Establish a Housing loan incentive program financed with public and private support based on the transfer fee	City; PMO; Housing Trust Fund	TBD	TBD
4	Ensure property management functions are kept in the hands of local stakeholders.	Community Organization	TBD	PMO	TBD	TBD
5	Streamline and ensure accountability of tenant and homebuyer marketing and selection policies and procedures for attainable housing options	Community Organization	TBD	TBD	TBD	TBD
6	Gain long-term community control of a percentage of land to be redeveloped for family friendly housing development.	City/Land Trust	- Establish a Land Trust and other leveraged resources - Identify other tools and incentives to promote family friendly housing development	TBD	TBD	TBD
					<b>TOTAL</b>	TBD

Housing working group members:

Strategy Leaders: Joe Beckmann, Regina Bertholdo, Ben Echeverria, Scott Hayman, Stephanie Hirsch, David Gibbs, Patrick McMahon, Erik Neu, Jhenny Saint-Surin, Ileana Tauscher, Benny Wheat and Wig Zamore. Other contributor: Katie Gradowski.

**Green and Open Space Recommendations**

COMMUNITY PRIORITY: To ensure access to a variety of quality green and open spaces by cultivating innovative approaches to upgrade and deliver new open space assets. The working group aims to increase the level of resiliency and sustainability in Union Square, increase public access, ensure proper implementation of the neighborhood plan and zoning code in relation to open space, and ensure stewardship.

For open space, each priority issue is a prerequisite before the next priority issue could be achieved. (I.e., Priority 1 needs to be achieved in order to complete Priority 2, and Priority 2 needs to be completed in order to achieve Priority 3 and so forth).

The working group identified the following key priorities and action items:

GREEN AND OPEN SPACE						
Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	
1	Maintain a higher percentage of open space in Union Square (30-34%)	City/ PMO / Developer	<ul style="list-style-type: none"> <li>- Create an acquisition fund for open space</li> <li>- Establish a Land Trust to acquire open space and provide stewardship</li> <li>- Use transfer fee monies to acquire open space</li> <li>- Establish a Parks and Recreation Department</li> </ul>	Urban Agriculture Ambassador program, Urban Park Ambassadors, Undergraduate Research Opportunity Program, High school/ District court community service	TBD	TBD
2	Assess the needed acreage for recreation	City / PMO	<ul style="list-style-type: none"> <li>- Work with the City to understand open space planning.</li> <li>- Assist the City in developing a plan to provide recreational space</li> </ul>	School system, particularly the High School	TBD	TBD
3	Promote better surface management and green infrastructure	City / PMO	<ul style="list-style-type: none"> <li>- Develop design standards and quantified goals.</li> <li>- Integrated storm water management improvements into street improvements</li> </ul>	TBD	TBD	TBD
4	Create design standards and guidelines for open space and public realm	City /PMO	<ul style="list-style-type: none"> <li>- Develop design standards and proportions for a variety of open space including green roofs, shared streets.</li> </ul>	TBD	TBD	TBD
TOTAL					TBD	

Green and Open Space working group members include:

Strategy Leaders: Stephanie Hirsch, Erik Neu, Cheri Ruane, Renee Scott, Anne Tate and Wig Zamore. Other contributor: Tori Antonio.

### Civic Space Recommendations

COMMUNITY PRIORITY: To create multi-functional civic spaces that focus on educational, social, cultural, and recreational activities in Union Square.

Civic spaces are recognized and valued by cities and towns for their unique characteristics

and additive that relates to and nurtures the larger community and brings the public together. To ensure Union Square remained a place that enriches the lives of its community members and enhances its surrounding buildings and neighborhoods, the Civic Space working group created a prioritized list of programmatic elements for Union Square’s civic and recreational space.

Each element is based on a 3-point scale that determines the highest and lowest priorities. Priority 1, highest priority elements are considered critical, because either they do not currently exist or are not accessible to all. Priority 2 elements are considered valuable, and may already exist, but more is needed, and lastly, Priority 3 elements are those that are dispensable because either they exist in some capacity or more of them are not needed.

The working group identified the following key priorities and action items:

CIVIC SPACE						
Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	
1	A meeting space for individuals and groups; performance and recreational space; community living room with free Wi-Fi; pickup/drop-off location for items requested from Minuteman library network.	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Stage Source, MBTA, US2, Don Law	6 mos.	TBD
1	A Welcome Center in connection with the GLX station	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	MBTA, US2, Don Law	1 yr.	TBD
1	Affordable daycare center	Community Organization	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	TBD	3 mos.	TBD

1	Shared retail space with shared amenities	Community Organization	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	US2, Chamber of Commerce	2 yr.	TBD
1	Community kitchen and café that serves as an incubator for food startups (places of connection)	City/PMO	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Union Kitchen, US2	6 mos.	TBD
1	Dedicated teen space with programs targeting that age group	Community Organization/ City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Arts Council on Aging, Boys and Girls Clubs, YMCA, Early Head Start/CAAS	6 mos.	TBD
1	A new location for the SCATV offices and studio	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	SCATV	2 yr.	TBD
2	A branch library with small focused collections of books, DVDs, CDs, etc.	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Library	2 yr.	TBD

2	Recreational center, containing a basketball court, locker room, and space for yoga and other classes	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	YMCA, City Dept. of Recreation	2 yr.	TBD
2	Small business incubator which includes job/career training center	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Artisans Asylum, Somerville High School Vocational Program, Steam Academy, Welcome Project, Canopy, Foundations, Teen Empowerment, Local universities, Greentown Labs	2 yr.	TBD
2	Health clinic providing affordable treatment options for residents	City	- Use transfer fee monies to acquire open space - Develop a "use transfer fee," through a Land Trust, to attract investments in community assets.	Cambridge Health Alliance	2 yr.	TBD
TOTAL						TBD

Civic Space working group members:

Strategy Leaders: Glenn Ferdman, Irma Flores, David Gibbs, Stephanie Hirsch, Erik Neu, Frank Valdes and Wig Zamore. Other contributors: Andrew Kopacz, and Nick Schonberger.

### **Parking, Transportation, and Mobility Recommendations**

COMMUNITY PRIORITY: To determine the best methods to ensure the greatest level of connectivity and accessibility for all ages and abilities and for all modes of transportation, minimize parking within Union Square’s core, maximize sharing and flexibility of parking structure, and reduce pollution from congestion.

Each priority is ranked from highest priority (1) to lowest priority (18).

The working group identified the following key priorities and action items:

PARKING, TRANSPORTATION, AND MOBILITY						
Top Priorities		Lead	Plan of Action	Partners	Duration	Cost
1	Secure the Green Line Extension to Union Square, and all other Somerville stops	City, CBA, Community Organization, PMO, ALL	Coordinate with City and State stakeholders to Identify a funding mechanism to support the GLX	TBD	1-4 months	TBD
2	Establish a Transportation Management Association (TMA)/ Parking Authority to provide residents, businesses and visitors with comprehensive parking management services, transportation demand management services, and decreased vehicle crashes.	Community Organization (TMA)	<ul style="list-style-type: none"> <li>- Ensure the agency sets pricing following a demand-based scheme that minimizes drive alone (SOV) auto trips and maximizes revenue.</li> <li>- 80% of district parking should be owned by this entity, and 100% managed.</li> <li>- Decrease in SOV trips, and increase bicycle, walking, and transit trips.</li> <li>- Decrease in air pollution and vehicle traffic congestion</li> <li>- Consider using District Improvement Financing (DIF)/Tax Increment Financing (TIF), or through the CBA, or through a PTDM regulation</li> </ul>	TBD	TBD	TBD
3	Ensure the future parking facility is central & shared (short-term), favors automated parking structures (mid-term), supports automation & self-parking (long term), and uses data-based parking charges to manage parking in a fair and equitable way.	Community Organization/ City	<ul style="list-style-type: none"> <li>- Consider a flexible building structure to facilitate future need for fewer cars, and parking.</li> <li>- Consider sharing incentives with developers.</li> <li>- Operations paid for by a base level of developer CBA funds (short term), and replaced with parking revenue (long-term)</li> <li>- Parking demand is managed through pricing with discounts for low-income drivers.</li> </ul>	TBD	TBD	TBD
4	Ensure all developers do a comprehensive traffic and parking study and create a Parking and Transportation Demand Management Plan	City/Developers	Developers	TBD	TBD	TBD

5	Maximize the use of new technology to increase efficiency of parking	Community Organization/ City	CBA	TBD	TBD	TBD
6	Increase in transit capacity in Union Square (better bus circulation, extension of the Green Line)	City	TBD	MBTA	TBD	TBD
7	Vision Zero (no traffic fatalities or serious injuries due to motor vehicles)	City	TBD	MBTA, MassDOT, surrounding cities, MassBike, WalkBoston, Livable Streets Alliance, Boston Cyclists Union	TBD	TBD
8	Electric Vehicle Charging Stations	City, PMO, TMA	CBA	TBD	TBD	TBD
9	Hubway Stations	City	CBA, Regulations, Developers separate from CBA?	TBD	TBD	TBD
10	Separated Bicycle Facilities (cycle tracks)	City	CBA, Regulations, Developers separate from CBA?	TBD	TBD	TBD
11	Sufficient Bicycle Parking	TBD	TBD	TBD	TBD	TBD
12	Commuter Shuttle to connect Union Square to Kendall, Assembly	TMA	CBA	TBD	TBD	TBD
13	Build the Grand Junction connection with Cambridge	City, PMO, TMA	CBA	TBD	TBD	TBD
14	Research study on new technologies and transportation (Uber/Lyft, mobile technologies, hubway, bike, walk, apps, autonomous vehicles, etc.)	City	TBD	TBD	TBD	TBD
15	Transit Priority at traffic lights (and other technology to give preference to transit)	City	CBA	TBD	TBD	TBD
16	Review of street design (to prioritize non-SOV accommodations) before approval for development	City	TBD	TBD	TBD	TBD
17	Flyover bridge next to Prospect Street to decrease interactions between people who bike/walk and auto vehicles	City, PMO, TMA	CBA	TBD	TBD	TBD

18	Change from minimum to maximum parking requirements	City	Regulatory Change	TBD	TBD	TBD
					TOTAL	TBD

Parking, Transportation and Mobility Working Group members:

Strategy Leaders: Bill Gage, Seth Grady, Stephanie Hirsch, Jennifer Lawrence, Patrick McCormick, Erik Neu, Philip Parsons, Frank Valdes, Don Warner and Wig Zamore.

### Smart City Infrastructure Recommendations

COMMUNITY PRIORITY: To create a Union Square Urban Innovation Hub to improve quality of life, bolster social capital and community resilience, attract great jobs, and spark collaboration between government, community, and the private sector to use new technologies to realize strategic objectives that will inform new initiatives and services across the city and beyond.

The group’s objectives are focused on providing open technologies, connectivity, and policies to support a shared civic innovation platform. Priorities are based on a 3-point scale that determines the highest and lowest priorities and sequencing. Priority 1, highest priority elements are considered critical, because they need to be addressed first and are dependencies for subsequent efforts. Priority 2 elements are considered important to achieve critical mass and sustainable smart city benefits, and lastly, Priority 3 elements are those that are dispensable because alternate paths could be identified to achieve underlying objectives.

The working group identified the following key priorities and action items:

SMART CITY INFRASTRUCTURE						
Top Priorities		Lead	Plan of Action	Partners	Duration	Cost
1	Establish a City Point of Contact(s) for Smart City infrastructure planning	City	N/A	N/A	3 mos.	TBD
1	Establish working group beyond what we have now with representation by City, community, US2, experts	Community Organization/ City/ Developer	N/A	Implicit	3 mos.	TBD
1	Establish think first “dig once” processes - permitting contingent on installation of conduit and fiber being incorporated into all road, water/sewer work	City	- Mayor and Board of Aldermen with input from City Solicitor as needed.	DPW, US2, Commonwealth, infrastructure vendors	3-6 mos.	TBD

1	Develop "backbone" connection to Internet, fiber, conduit, community broadband - engage MBTA and other key partners	Community Organization/ City	- RE transfer, DIF, TIF, or other available	MBTA, US2, City of Cambridge, Google, MTC	1 yr.	TBD
1	Develop, publish open data, privacy/security requirements and policies	Community Organization/ City	- Mayor and Board of Aldermen with input from City Solicitor as needed.	Harvard Kennedy School, MIT, Shareable Cities, Code for America	3-6 mos.	TBD
2	Draft design/implementation plan that identifies existing and new assets and sequence, timeframe required	TBD	- RE transfer, DIF, TIF, or other available	TBD	6 mos. to 1 yr.	TBD
2	Identify open access and interoperability standards for hardware, software, and data levels to optimize innovation and sustainability	TBD	- RE transfer, DIF, TIF, or other available	Harvard Kennedy School, MIT, Shareable Cities, Code for America	6 mos. to 1 yr.	TBD
2	Develop cost estimate for capital and operating expenses with target funding sources, cost savings, and revenue potential	TBD	- RE transfer, DIF, TIF, or other available	TBD	6 mos. to 1 yr.	TBD
2	Identify key requirements to improve city services and foster civic and private sector innovation	Community Organization/ City	- Some administrative and staff support or involvement by City	Harvard Kennedy School, MIT,	1 yr.	TBD
3	Establish innovation task force to inform working group, City (consider Chief Innovation Officer role), community, SHS students, recruit external resources (HKS/ Ash Institute, MIT, Code for America, etc.)	Community Organization/ City	- Some administrative and staff support or involvement by City	Harvard Kennedy School, MIT,	2+ yrs.	TBD
3	Crowd source smart city community manifesto that correlates to SomerVision, Neighborhood Plan, Locus strategies, etc.	Community Organization	- Some administrative and staff support or involvement by City	Community / public	6 mos. to 1 yr.	TBD
3	Identify and establish institutional and private partners	Community Organization	N/A	TBD	6 mos. to 1 yr.	TBD
3	Create links with 311, Resistant to ensure interoperability, shape design	Community Organization/ City	N/A	Mayor and Department heads	3-6 mos.	
					TOTAL	TBD

Smart City Working Group members include:

Strategy Leaders: Joe Beckman, Patrick McCormick, Phillip Parsons, Anne Stephens Ryan

and Anne Tate.

### Climate Change/Sustainability Recommendations

COMMUNITY PRIORITY: To ensure that all practices from planning, through construction, and up to implementation take into consideration environmental sustainability, reduction of carbon use, and preparation for future climate change.

The working group identified the following key priorities and action items:

CLIMATE CHANGE/SUSTAINABILITY						
Top Priorities		Lead	Plan of Action	Partners	Duration	Cost
1	Community Shared Solar facility	City	TBD	City, Commonwealth	1-2 yr.	TBD
2	Energy Options Analysis (research and implementation)	City	TBD	City, Commonwealth	Now	\$100,000
3	Electric Vehicle Charging Stations	City	TBD	City	1-2 yr.	
4	Hubway Stations	City	TBD	City, Property Mgmt Companies, Training Company	Ongoing	\$95,000
5	Fund to offset maintenance training for property management companies and City staff (to handle new kinds of infrastructure)	PMO	TBD	City	Ongoing	TBD
6	Revolving Loan Fund to fund these kind of infrastructure	PMO	TBD	City	Ongoing	TBD
7	Revolving Loan Fund to assist business tenants to offset potential increase in rents by developers to cover costs of infrastructure improvements	PMO	TBD	City, Business Association (Chamber, Somerville Local First, USMS)	Ongoing	TBD
8	Mandatory sustainability training for municipal facilities staff and private property managers	City/PMO/Expert Community Organization	TBD	Training company, City Expert Community Organization	Ongoing	TBD
TOTAL						TBD

Climate Change/Sustainability Group members:

Strategy Leaders: Joe Beckman, Jennifer Lawrence, Patrick McCormick, Renee Scott, Wig Zamore. Other contributors: Tori Antonio, Maureen Barilla, Leigh Meunier, Melissa Lowitz, Andrea Ranger, Rusty Russell, Jennifer Stevenson and Karl Thidemann

## Finance Recommendations (Pending)

COMMUNITY PRIORITY: To explore funding sources that could be applied for and used to fund Union Square’s community benefits.

Strategy Leaders: Joe Beckmann and Wig Zamore

*NOTE: The Finance working group did submit their recommendations and action plan. LOCUS will work with the Finance working group to incorporate their findings into Phase 2 of the Union Square Strategic Planning and Community Benefit Process*

## Place Management Organization (PMO) Recommendations

COMMUNITY PRIORITY: To establish a community-based organization to support community development by protecting vulnerable populations, preserving community diversity, enhancing the business climate to attract investors, ensuring stewardship and environmental sustainability, and coordinating efforts to achieve other community goals.<sup>4</sup>

For Place Management, each priority is ranked from highest priority (1) to lowest priority (7).

*NOTE: Each priority issue is a prerequisite before the next priority issue could be achieved. (I.e., Priority 1 needs to be achieved in order to complete Priority 2, and Priority 2 needs to be completed in order to achieve Priority 3 and so forth).*

The working group identified the following key priorities and action items:

PLACE MANAGEMENT ORGANIZATION						
Top Priorities		Lead	Plan of Action	Partners	Duration	Cost
1	Establish and report on preliminary preferences for PMO responsibilities in order to focus research and dialog	Working Group	TBD	TBD	TBD	TBD
1	Establish clear interim strategy for community role in CBA prior to establishment of PMO	Strategy Leaders	TBD	TBD	TBD	TBD
2	Review and select preferred model(s) to achieve ideal PMO responsibilities	Working Group	TBD	TBD	TBD	TBD
3	Design the governance organization and strategy for establishing legal standing	Working Group	TBD	TBD	TBD	TBD
4	Determine how to manage conflicts of	Working	TBD	TBD	TBD	TBD

<sup>4</sup> During the first meeting, a subgroup of the PMO Working Group presented a recommendation that that an Independent Community Group (i.e., PMO) be a party to the negotiation and execution of any Community Benefits Agreement with any developer of land in Union Square/Boynton Yards. This recommendation will be address by the Strategy Leaders as whole as part of their discussion on the proper PMO structure to carry out activities guided by the Union Square Strategy and Implementation plan.

<sup>5</sup> This priority recommendation will be brought to Strategy Leaders as a whole for discussion and deliberation.

	interest and ensure representation and credibility in short/long-term	Group				
5	Determine the scope of daily place management operations	Working Group	TBD	TBD	TBD	TBD
6	Determine funding sources for daily place management operations	Working Group	TBD	TBD	TBD	TBD
7	Take necessary steps to ensure legal standing or authority, including influencing CBD legislation to our benefit	Working Group	TBD	TBD	TBD	TBD
TOTAL						TBD

PMO Working Group members include:

Strategy Leaders: Joe Beckmann, Tom Bent, Ben Echeverria, Irma Flores, David Gibbs, Esther Hanig, Scott Hayman, Stephanie Hirsch, Jennifer Lawrence, Patrick McCormick, Erik Neu, Courtney O’Keefe, Philip Parsons, Jhenny Saint-Surin, Anne Tate and Wig Zamore. Other contributors: Tori Antonio, Katie Gradowski, Van Hardy, Andrew Kopacz, Kristen Lucas, Rene Mardones and Bill Shelton.

## Union Square Strategic Planning and Community Benefits Process Outcomes and Next Steps

The City, Union Square Strategy Leaders, and general public accomplished a significant amount of work over the course of the LOCUS process. The Union Square pilot established a shared understanding and a mutual trust among Strategy Leaders to facilitate a comprehensive and transparent dialogue on the public needs of Union Square’s residents and businesses. Together they were able to create a Public and Community Benefits Strategy and Action Plan designed to preserve and enhance what makes Union Square unique. However there was general consensus that additional work is required to ensure proper implementation of the Union Square’s Public and Community Benefits Strategy and Action Plan.

### **Transitional Process Until Place Management Organization is Established**

During the March 14<sup>th</sup> meeting, the city provided a general timeline review period for the Community Benefits Agreement (CBA) and the role of the Civic Advisory Committee (CAC) and Somerville Redevelopment Authority (SRA). While the PMO would be the ideal community organization to be a party to the US2 CBA process as well as tackle some of the more time-sensitive priority issues (i.e., implementing displacement strategies) identified by the Strategy Leaders, establishing a PMO in Union Square will need more time to conduct needed analysis and prep work including (1) bringing in outside experts from throughout the country to advise the Strategy Leaders on best practices, (2) to determine the scope of work and structure and (3) secure necessary local authority or state enabling legislation.

Given the timeline, establishing the PMO does not align with the first phase of the Union Square redevelopment process. The City has thus outlined a process in which the CAC will serve as the transitional body that would advise the SRA – using the Union Square Strategic Planning and Community Benefits process as its guiding framework – as it negotiates the first community benefits agreement with US2.

*NOTE: It has been recommended by a subgroup of Strategy Leaders that there could be a merger of the CAC and LOCUS efforts, until the PMO is formed, streamlining the process. This recommendation will require agreement of the LOCUS Strategy Leaders as a whole, the CAC and the City. During the May-June Strategy Leaders meetings, this proposal will be on the agenda for further discussion.*

In parallel to the transitional process described above, the following activities outlines the next steps that the Strategy Leaders, and the City with continued support from LOCUS will conduct over the next six months:

### **Activity #1: Refinement of Work and Implementation Plan**

A key part of effective implementation is assigning and defining management roles & responsibilities for each of the nine working groups established in this Action Plan. By May 2016, LOCUS will reconvene with the Strategy Leaders to review the key priorities identified, determine a plan of action to achieve the priorities, and assigned appropriate Strategy Leader(s) who will be responsible for either carrying out or coordinating the associated action items and, in turn, accomplishing the goals by a given deadline. This will be done in parallel with the PMO discussion.

### **Activity #2: Establish a Place-Management Organization**

As mentioned above, establishing a PMO in Union Square will require additional analysis and prep work including (1) bringing in outside various subject matter experts from throughout the country to advise the Strategy Leaders on best practices, (2) determining appropriate scope of work and structure to support the priorities and activities identified by the Strategy Leaders and (3) securing necessary local authority or state enabling legislation. The following outlines the LOCUS activities that will be conducted over the next four months:

#### Bring Outsides Experts on Place-Management Organizations

By June 2016, LOCUS will bring in experts including Marco Li Mandri (an expert on community benefit districts and neighborhood revitalization), Rich Bradley of the Downtown DC BID and/or Carol Naught on of Purpose Built Communities (an expert on community quarterback models) to talk about various models that exist and provide strategic guidance to the Strategy Leaders on how to align the PMO structure and activities to best to support the Union Square Public And Community

Benefits Strategy and Action Plan.

#### Facilitate Discussion and Agreement on PMO Structure

By June 2016, LOCUS will facilitate a meeting with the Strategy Leaders and members of the community to discuss the pros and cons of the various PMO models and come to a consensus on the best structure and activities that works for the Union Square Public And Community Benefits Strategy and Action Plan and the community as a whole.

*NOTE: The Place Management working group has made significant strides in focusing research and dialog towards establishing preliminary preferences for a Place Management organization. This session will use their preliminary findings as a base line of the Strategy Leader discussions.*

#### Establish a PMO/Non-Profit Entity

By late summer 2016, LOCUS hopes to have helped establish a PMO – that is agreed upon and designed by all of the Strategy Leaders – to support community development and coordinate efforts as defined by the Union Square’s Strategic Planning and Community Benefits. Should the PMO group and other involved persons identify a process or needs that will take longer than this, the group may decide to extend this deadline.

### **Activity #3: Conduct a Social Equity and Sustainability Scan**

LOCUS will also conduct a quantitative analysis using the social equity performance metrics from the Metro Boston WalkUP Wake Up Call to determine if the existing strategy for Union Square will “move the needle” for equitable development. LOCUS will also partner with national and regional organizations to determine the best way to conduct a Sustainability Plan. Both analyses should be completed annually to measure progress over time.

### **Activity #4: Reconvene Strategy Leaders, Social Equity Scan Follow up**

LOCUS will reconvene the Strategy leaders in 2-3 months to conduct a social equity scan follow up, and to evaluate progress on the Union Square Strategic and Community Benefit Plan. This meeting is designed to hold the Strategy Leaders and other stakeholder accountable to the Action Plan.

## Appendix

### Appendix A: Place Management Organization Summaries

NOTE: This summary was provided to Strategy Leaders to serve as background on examples of place base organizations across the country.

Place Management is described “as a coordinated, area-based, multi-stakeholder approach to improve locations, harnessing the skills, experiences and resources of those in the private, public and voluntary sectors” (Place Management). This process includes and is not limited to community development, regeneration, management, marketing, economic development or any variation of these. Nonetheless the underlying objective is the same – to improve or strengthen the effectiveness of a location for the benefit of its users, whether they are residents, shoppers, tourists, investors, property developers or business owners.

Place management organizations can take a number of forms, including Community Land Trusts, Community Benefit Districts, Business Improvement Districts, Community Quarterbacks, and Task Forces to name a few.

Reference:

Place Management. (n.d.). Retrieved from The Institute of Place Management: <http://www.placemanagement.org/>

#### **Community Land Trust (CLT)**

Community Land Trusts have a long history of organizing resources to stabilize land uses and, increasingly, population and diversity in urban centers. Beginning in the 19th century, when they were organized primarily to hold public and maintain lands for common community purposes ranging from agriculture to, by the 20th century, develop alternative means of ownership, stabilizing costs by owning either a share of equity or the land under developed properties, these trusts usually involve public, private, neighborhood and commercial interests in joint or collaborative enterprises, housing, and incubating new initiatives. While traditionally their primary asset was through eminent domain, as the Dudley Street Neighborhood Initiative shows in Boston, increasingly their assets are more diversified, and often stem from transfer fees or taxes, as do the Nantucket and Martha’s Vineyard Land Banks.

The distinctive quality of Land Trusts is that they typically own property or shares of property and receive long term returns on their investment. When, as in Massachusetts, the Trusts access transfer fees, they may underwrite or guarantee other private financing. This financial leverage creates substantially more asset value than most kinds of property ownership, reflecting the larger share of ownership held by private property owners while limiting the returns on that ownership by controlling key parts of the title to the property involved. Limited or shared equity, as well as leaseholds and shares in community ventures have a substantial history of guaranteeing long term affordability at low cash costs.

Transfer fees have a long and varied history in Massachusetts and nationally, with rates

ranging from less than one to three percent of all, some or selected real estate transfers. In Somerville they were first reviewed and recommended by Mayor Capuano's Affordable Housing Task Force, in 1998, and the suggested rate of 1% would have resulted in approximately \$2,000,000 per year in discretionary income which, if invested in ways then typical of such sources, might have produced twenty to thirty units of then affordable housing. Since 1998, however, the volume and pricing of real estate transfers has grown exponentially, at over 10% per year, to a level now approaching \$1,000,000,000 per year. In a city of 4.2 square miles, this volume would represent \$10,000,000 per year in income, which, if managed through a typical land trust, could produce up to \$100,000,000 in housing and enterprise support.

These characteristics were more recently reviewed by the Sustainable Neighborhoods Working Group, in December 2015, and figured prominently in their final report. Their key finding recommended a 1% transfer fee for all but a few exceptional transactions, particularly in periods of high inflation like those now taking place. A regional conference on Community Land Trusts is scheduled for April 27, 2016.

References:

[Nantucket Islands Land Bank](#)

[Martha's Vineyard Land Bank Commission](#)

[Land Bank Model, Smart Growth America](#)

[Community Land Trust Reader](#), John E. Davis, editor, 2010

[Mapping Impact: An Analysis of the Dudley Street Neighborhood Initiative](#), Lee Allen Dwyer, MIT (2015)

[Real Estate Transfer Taxes](#), National Conference of State Legislatures  
Lincoln Institute of Land Policy, [Real Estate Transfer Charges Index](#)

[Sustainable Neighborhoods](#) Somerville,

### **Community Benefit District (CBD)**

A CBD is a geographically defined area in a city or town where a dedicated assessment-funding tool is used to make improvements in that area. CBDs provide supplemental services and management of principal areas including downtowns, town centers, "Main Streets," villages, or urban squares.

In essence, a CBD provides a local-option mechanism for sustaining a district's revitalization and placemaking efforts by establishing a public-private-nonprofit partnership, managed by a 501(c) 3 organization, and financed by a property assessment and other revenue sources.

Owners paying the district fee, as well as the public in general would receive the benefit of the supplemental services; activities and improvements that the district wants and could participate in its governance. CBDs establish a financially and organizationally sustainable vehicle for formalizing the public-private-nonprofit partnerships that places need to thrive.

CBDs are able to use entrepreneurial revenue, foundation/charitable support, and parking revenue to fund their work, in addition to the property assessment.

### Benefits of a CBD

- CBDs include a broad range of community stakeholders. The board must include at least 51% commercial, residential, nonprofit and public property owners.
- A CBD is a highly flexible vehicle for local stakeholders to shape their community's goals and use their own resources to solve their challenges.
- CBDs can employ in-house staff to perform services including and not limited to landscaping, visitors assistance, caring for street trees, running shuttles, operating farmers' markets, and managing shared parking.
- District management creates a new employment sector, with good paying blue-collar jobs.
- CBDs provide needed stewardship for long-term placemaking strategies.
- CBDs offer a strong voice to influence new real estate development, can recruit capital and advocate for infrastructure, and play an essential role in coordinating among property owners, municipal government, and the community. They can help ensure that the district enjoys a healthy balance of housing and commercial development, and can cultivate an environment that is welcoming to a range of needs and incomes.
- A CBD can plan, fund, manage and even own physical improvements in public spaces, like a public plaza or a new dog park.
- A complementary bill on parking districts would allow municipalities to delegate parking management within a district to a CBD or BID and use parking revenue to support improvements within the district (Senate 1094/House 1855).

### Costs of a CBD

- Decisions directed largely by largest landholders, paid by all, with neither oversight nor specific benefits to either commercial or residential tenants.
- Costs avoid supervision by tax accountable authorities, and defer or deny municipal as well as private funds.
- Taxpayers and voters pay for gentrification, while newcomers are neither engaged in the community nor accountable for their inflationary impact.

### Reference:

An Act Relative to Creating Community Benefit Districts (CBDs) - Senate Bill 2065.  
[San Diego precedent](#)

### **Business Improvement Districts (BID)**

A BID is a publicly approved district that allows business and property owners to levy an assessment fee on property owners within the district in order to fund additional public services and improvements (Hoyt and Gopal-Agge, 2007). The assessment is levied only on properties within the district and expended within the district for a range of services and programs, such as sanitation, marketing, maintenance and public safety. This stable, local management structure provides a funding source for the revitalization and long-term maintenance of a city or town center district.

In Massachusetts, a BID may be formed in any community, and is established through a

local petition and public hearing process. To successfully implement a BID, the proposed District must be a contiguous geographic area with at least 75 percent of the area zoned or used for commercial, industrial, retail, or mixed-use. In addition, the petition must include delineation of the BID boundaries, a proposed improvement plan, a budget and an assessment fee structure strategy.

A Board of Directors, designated by the members of the District, governs each BID. The Board of Directors may include commercial owners or tenants, and/or residents.

BIDs deliver a range of services over and above baseline services provided by the municipality and invest in long-term economic development of their Districts. Services can include: Public space maintenance, Public safety/hospitality, Capital improvement, Business development, Landscaping, Community Service, and Marketing.

#### Benefits of a BID

- BIDs create a cleaner, safer, and more attractive business district
- Create a steady and reliable source of funding for supplemental services and programs
- Be able to respond quickly to the changing needs of the business community
- Build potential to increase property values, improve sales, and decrease the number of vacant properties
- Help the district to compete with nearby retail and business centers

#### Costs of a BID

- Segregating business from residential interests encourages outside, non-resident commercial interests at the cost of nearby residents
- Presuming that business interests are distinct from start-up, part-time, and flex-time planning and development costs the most valuable innovations (eg., Artisans, Canopy, etc.) and benefits a few established businesses
- Charging the immediate neighborhood for neighborhood interests ignores the broader impact of those interests in both residential and commercial spheres
- Impact investment mobilizes and alligns both investor and consumer interests

#### References:

Margaret Keaveny. (n.d). A Guidebook of Massachusetts' Public Financing Programs for Infrastructure Investment. Retrieved from the Website of the Commonwealth of Massachusetts: <http://www.mass.gov/hed/economic/eohed/pro/tools/public-financing-guidebook.pdf>

Steve Case. [Third Wave](#). and its review in the [Washington Post](#) and [other sites](#).

#### **Task Force**

A task force is a small group, usually four to twelve people, that brings together a specific set of skills to accomplish a short-term task. These groups of individuals work with community stakeholders, government officials, business owners and policy experts to identify actionable recommendations for community planning, workforce development, small business enterprise and housing opportunities.

The Davis Square Task Force for example, is composed of proactive residents, business owners, residents and local officials who act as a citizens' advisory committee regarding the revitalization plans and to address a major concerns that had divided the dividing the community on the type and extent of development.

The Davis Square Task Force has initiated many projects with the City of Somerville to accompany the Red Line extension, using the redevelopment of empty parcels to build the type of community that they had envisioned. Projects included:

- Streetscape improvements with funds from the Federal Highway Administration's Urban Systems Program, including street reconstruction, sidewalk widening, new lighting, fences and planting.
- The renovation of Kennedy Park at the corner of Grove Street and Highland Ave.
- Storefront and facade improvements with a grant from the city's Community Development Block Grant entitlement.
- The construction of additional public parking, in small lots, throughout the Davis Square area; and
- The construction of the Ciampa Manor Elderly Housing development on College Avenue. (Local residents favored residential over commercial development at this prime site, a gateway to Davis Square.)

Reference:

Nikitin, P. C. (n.d.). Davis Square - Somerville, MA. Retrieved from [http://bershad.com/gb/davis-square/DavisSq\\_moreinfo.html](http://bershad.com/gb/davis-square/DavisSq_moreinfo.html)

### **Community Quarterback**

A **Community Quarterback** is a single local organization that serves as a lead systems integrator for antipoverty work within a community, bringing together people who work across sectors such as affordable housing, education, healthcare, and workforce development (Andrews & McHale, 2014). Under the quarterback organization's direction and lead, these stakeholders work as a team toward agreed-upon goals, such as improving public safety or academic performance among children. The quarterback articulates a vision, marshals the funding sources to support the work, tracks progress in achieving goals over time, adjusts strategy based on performance, and holds everyone accountable.

A community quarterback may take many forms, depending on the community's needs and circumstances. For example, in St. Paul-Minneapolis, Living Cities' Integration Initiative acts as a convener and coordinator, gathering an array of strong local institutions around one table to achieve desired community improvements. While Youth Policy Institute, the community quarterback for the Los Angeles Promise Neighborhood, collaborates with more than 60 stakeholder organizations to offer a range of services for youth and families, such as prenatal and early childhood development, college preparation, career development, dropout and gang prevention (Andrews & McHale, 2014).

### Benefits of Community Quarterbacks

- Community quarterbacks step up and lead the drive to connect people, places, and proven strategies
- They ensure people in the targeted neighborhood are engaged, included, and served
- Community quarterback drive revitalization initiatives to ensure housing, education, and community wellness components are successful and sustainable.
- They confront community-wide problems through partnerships, collaboration, team building, and focusing on outcomes and evidence.
- They align smart policies, smart money, and smart approaches to improve neighborhoods and create opportunity for all.
- Community quarterbacks serve as a single point of accountability for partners and funders

The Partners in Progress (PIP) initiative, funded by the Citi Foundation, is testing the quarterback model on a national scale, and is currently funding several organizations across the country. Their work differs in scope and objectives, but they all follow the same framework for delivering powerful outcomes for people and places (Andrews & McHale, 2014).

### Reference:

Andrews, N. O., & McHale, B. (2014, July 22). Community Development Needs a Quarterback. Retrieved from Stanford Social Innovation Review:

[http://ssir.org/articles/entry/community\\_development\\_needs\\_a\\_quarterback](http://ssir.org/articles/entry/community_development_needs_a_quarterback)

Community Quarterback. (n.d.). Retrieved from Purpose Built Communities:

<http://purposebuiltcommunities.org/our-approach/lead-organization/>

Partners in Progress : The Quarterback Model. (n.d.). Retrieved from Partners in Progress:

<http://partnersinprogressproject.org/quarterback-model/>

### **Transportation Management Association (TMA)**

A Transportation Management Association is a membership based, public-private partnerships of residents, businesses, institutions and municipalities that are joined together under a legal agreement for the purpose of providing and promoting transportation solutions for commuters that reduce traffic congestion, improve air quality and increase access to economic development opportunities (Mass Commute).

TMA's work with public agencies, employee transportation networks, shuttle operations, resource/legislative advocacy, commuter services and other Transportation Demand Management programs to ensure that community goals are supported in the most flexible and creative way to maximize the benefits for businesses, residents and commuters.

TMA's provide flexibility and a forum for multiple stakeholders to work together to establish policies, programs and services to address their district's particular transportation issues.

TMA's are typically private business associations staffed by an Executive Director or a small staff, and overseen by a volunteer Board. Chambers of Commerce, business associations,

developers or businesses often initiate TMAs as an economic tool as well as to address congestion issues.

Benefits of a TMA:

- TMAs coordinate transportation efforts of various stakeholders including employers, developers, residents and government agencies.
- TMAs promote alternative transit modes and for complying with ordinances.
- TMAs improve access to employment and retail centers while reducing traffic congestion and its resulting pollution.

A Better City (ABC) TMA, for example, is an independent, consensus oriented, nonprofit organization made up of employers, retailers, business owners, public sector representatives and others working together to address employee transportation issues and improve air quality and traffic in the downtown and Back Bay areas of Boston (Mass Commute).

Reference:

Mass Commute. (n.d.). Retrieved from List of MA TMAs:

[http://www.masscommute.com/tma\\_directory/](http://www.masscommute.com/tma_directory/)

Transportation Management Organizations (TMOs). (n.d.). Retrieved from City of Boulder Colorado Website. <https://bouldercolorado.gov/transportation/transportation-management-organizations-tmos>

### **Main Street America - National Main Streets Association**

The National Main Street Center, a program of the National Trust for Historic Preservation works with a national network of coordinating programs and local communities to encourage preservation-based community revitalization.

To support this powerful network, the National Main Street Center has a revitalization framework—the Main Street Approach—that it uses to help communities to leverage both the art and science of downtown revitalization to create a better quality of life for all, improve the design of their neighborhoods, promote their district, and enhance the economic base of a community.

The Main Street Approach harnesses the social, economic, physical, and cultural assets that set a place apart, and ultimately leads to tangible outcomes that benefit the entire community. It consists of three tightly integrated components: community visioning and marketing understanding (the inputs), transformation strategies (implemented using the Four Points), and implementation and measurement (the outcomes).

By joining the National Main Street Center, commercial districts are able to put one of the most successful community revitalization strategies in the nation to work.

Reference:

Main Street America. (n.d.). Retrieved from National Trust for Historic Preservation:

<http://www.preservationnation.org/main-street/>

## **International Downtown Association (IDA)**

The International Downtown Association is a champion for vital and livable urban centers and strives to inform, influence and inspire downtown leaders and advocates.

Through its network of diverse practitioners, its rich body of knowledge, and its unique capacity to nurture community-building partnerships, IDA provides tools, intelligence and strategies for creating healthy and dynamic centers that anchor the well-being of towns, cities and regions of the world.

Reference:

About IDA. (n.d.). Retrieved from International Downtown Association: <https://www.ida-downtown.org/eweb/DynamicPage.aspx?webcode=IDAAboutIDA>

## **Appendix B: Attainable Housing And Social Equity Initiative And Pilot Process**

Launched in 2014, LOCUS's [Attainable Housing and Social Equity Initiative](#) (AHSEI) aims to ensure that walkable communities are affordable and accessible to the full range of a community's residents and local businesses. The AHSEI is in line with LOCUS long-standing mission and platform and aims to:

- 1) Catalyze private sector advocacy for state, local, and federal policies that promote affordable, equitable, walkable neighborhoods,
- 2) Conduct market-based research and policy analysis to inform implementation of smart growth and equitable development;
- 3) Develop new private sector led, place-based approaches to address social equity in walkable urban places; and
- 4) Increase the number of smart growth projects that are ready for private investment.

Currently, the rising popularity (and therefore prices) of walkable neighborhoods is making it more difficult for lower income households to gain access to these high amenity, low transportation cost locations, and has in some cases led to displacement of long time residents. The market cannot solve these issues by itself. Left unaddressed, walkable neighborhoods that lack economic diversity will fail to provide benefits to those who most need them, fall short of their potential to cut climate emissions and may create political opposition—further limiting their climate impact and pushing the country back towards increased sprawl, increased driving and increased climate impacts. Both public and private interventions are needed.

It is within this context that LOCUS seeks to capitalize on the opportunity created by the country's momentum towards developing sustainable communities to address the need to ensure that low income and minority communities are beneficiaries of this trend.

The [Attainable Housing and Social Equity Initiative Pilot](#) Process seeks to develop new sustainable strategies that balance the market demand for great walkable urban places and

communities, with the need for jobs, housing and transportation that are attainable and equitable to all Americans. LOCUS will work with a number of cities throughout the U.S. to develop individualized approaches for each community aimed at implementing public and private sector strategies for ensuring accessibility and social equity in great walkable urban places. The pilot will help address the need for these places to continue to provide attainable housing for all residents, job opportunities and training, local business opportunities, well-maintained public spaces and other identified community needs.

The Pilot will use base data in the [WalkUP Wake-UP Call Reports](#), research co-authored by Chris Leinberger, LOCUS President and professor at George Washington University (GWU). The WalkUP Wake-UP Call reports have demonstrated that throughout the United States, the real estate market is shifting away from drivable sub-urban development patterns towards walkable urban places. The focus of the ASHEI is on regionally significant walkable urban places, where there are employment concentrations and civic functions located, as opposed to local serving walkable urban places (bedroom communities). The GWU research refers to regionally significant walkable urban places as WalkUPs.

### **Appendix C: Locus Background**

[LOCUS: Responsible Real Estate Developers and Investors](#) is a program of Smart Growth America (SGA) and its members have a long history of implementing a progressive development agenda, and many were pioneers of the major federal affordable housing programs of the past generation, including the Low Income Housing Tax Credits and HOPE VI. LOCUS is the national coalition of real estate developers and investors who advocate for sustainable, equitable, walkable development in America's metropolitan areas. LOCUS is one of the few private sector real estate organizations to actively integrate affordable housing policy with development interests.

## **Appendix D: Union Square Strategic Planning and Community Benefits Process Session Agendas**

### Union Square Strategy Session 1 Agenda – November 18, 2015 (1:00 – 9:00 pm)

- Introduction of Public Benefits Strategic Planning Process and facilitating team from LOCUS
- Introduction of Strategy Leaders and the organizations/issues they represent
- Review of Briefing Book
- Community Input that was not covered by Briefing Book
- Review of Neighborhood Plan
- Introduction of Fiscal Model of the Neighborhood Plan
- Community input on Neighborhood Plan and discussion of how neighborhood plan will fit into the public benefits strategic planning process
- Dinner Break
- Place Management 101, an overview of regionally significant place management in the metro Boston context
- Community Input that relates to Place Management 101
- Distribution of Strategy Card samples to Strategy Leaders and explanation on their use
- Suggested use of time between November 18<sup>th</sup> and January 13<sup>th</sup>/14<sup>th</sup> for Strategy Leaders, plus support provided by LOCUS and City staff
- Overview of January 13<sup>th</sup> and 14<sup>th</sup> Sessions

### Union Square Strategy Session 2 Agenda - January 13, 2016 (5:00 – 9:30 pm)

- Welcome
- Strategy Leaders (re) introductions
- Overview of process to-date and plan for next two days by Chris Leinberger
- Fiscal modeling intro and 1<sup>st</sup> cut demonstration by Carson Bise
- Dinner Break
- Strategy card submissions overview by Chris Leinberger
- Strategy Leader discussion of card submission overview
- Key Questions:
  - Which strategies and public benefits are the most agreed upon?
  - Which strategies and public benefits are missing?
  - What do we do - incorporate or dismiss the strategies and public benefits that do NOT have consensus?
  - Can we agree w/the final list of strategies and public benefits?
- Strategy Leader discussions based on fiscal modeling - revisions based on model
- Key Questions:
  - With limited resources, which strategies and public benefits require immediate, mid-term or long-term action?
  - What are the sources of increased revenues (value sharing, increased development, other) that could be developed to fund strategic and public benefits?

- Discussion of Next Steps and Homework for tomorrow, including assigning (or allow volunteers) to develop action steps for each strategic item to present their initial ideas on implementation day when their portion is up for discussion.

Union Square Strategy Session 3 Agenda - January 14, 2016 (5pm – 9:30 pm)

- Welcome and Review of Priority Strategy Cards
- Update on Fiscal Cost of Strategy Cards (Carson)
- Breakout Session
- Working Dinner: Group Reports
- Group Discussion on Low Priority Strategy Cards
- Group Discussion on Role of Place Management Organizations/ Ensuring Accountability
- The Impact of the Public Benefit Process on Future CBAs
- Implementation and Next Steps
- Group Reflections
- Closing Remarks

Union Square Strategy Session 4 Agenda - February 16, 2016 (6:30 – 8:30 pm)

- CAC Public Comments / Updates
- LOCUS - Brief Welcome and Group Presentation
- Economic Development Working Group Presentation
- Housing Working Group Presentation
- Green and Open Space Working Group Presentation
- Parking/Transportation Working Group Presentation
- Civic Space/Library Working Group Presentation
- Smart City Infrastructure Working Group Presentation
- Place Management/Governance Working Group Presentation
- Closing Remarks

## Appendix E: Fiscal Analysis Presentation

LOCUS Presentation: January 13, 2016

# Union Square Strategies and Public Benefits

January 13, 2016 – Somerville City Hall

January 14, 2016 –Argenziano School

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## Agenda (First Half of Session #2)

- Welcome and Announcements
- GLX Update (Brad Rawson)
- Strategy Leader (re) introductions
- Overview of Session #2
- Fiscal Modeling Introduction (Carson Bise)
- Working Dinner Break

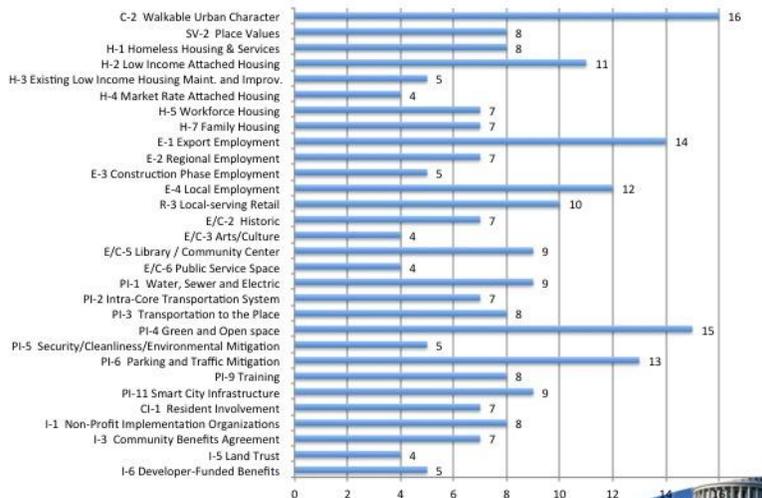


## Union Square Strategy Cards

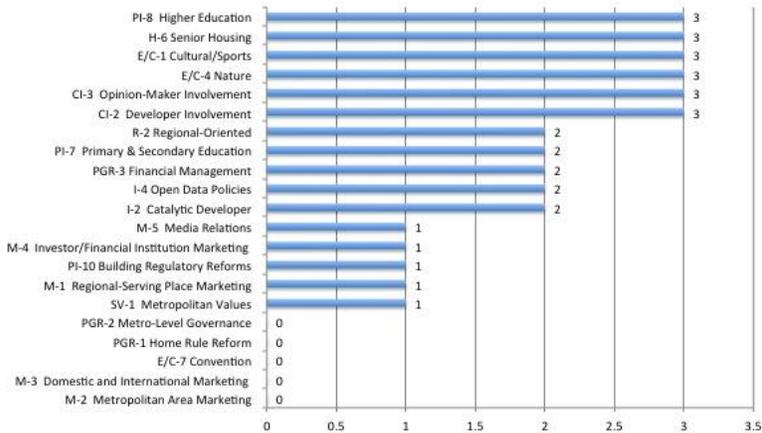
- Strategy Leaders and members of the public selected the cards that reflect the future strategy of Union Square; economic, social equity, community benefits, infrastructure, etc.
- In total, 11 Broad Categories with 51 Strategy Cards
- Each strategy card was edited by Strategy Leaders to reflect specific goals and objectives for Union Square



### Strategy Card Submissions <4



### Strategy Card Submissions >3



## Strategy Card Submissions

- 23 Strategy Leaders submitted their choices for strategy cards
- Top 10 strategy cards all with 9 votes or greater listed below for discussion
- Related cards are shown to facilitate conversation around similar topics at same time.



## C-2 Walkable Urban Character

- Increasing foot traffic to support retail and cafes during the day as well as the evening
- Supporting the arts & creative economy
- Supporting a child friendly city
- Supporting a senior friendly city
- Supporting the immigrant community through ESL classes, technology classes, public access computers, and support for job applications
- Support public space including access to public library, public meeting and gathering space etc.
- Variety of use in different locations: toddlers playing, sunbathers reading, office workers picnicking
- Preserve community scale of buildings, avoid mega blocks when possible. There should be setbacks when abutting adjacent residential uses.
- Food trucks, water features, street vendors, street performers
- Seasonal change: holiday lights, tree light, hanging baskets, street light, street light banners
- Lighting for people as well as vehicles
- Isolate pedestrian and bicycle access from vehicle traffic when possible
- Include exclusive pedestrian access between buildings and within the urban fabric as much as possible
- Manage parking for the short, medium and long term employing shared parking strategies, prioritizing pedestrians and
- developing strategies to reduce parking over time.
- Preservation of historically significant architecture.
- Diverse architectural styles; avoid monolithic architecture; create spaces welcoming to folks of many backgrounds
- Integrate the built environment with green and open space to the maximum extent possible



## E/C-5 Library/Community Center

- Encourage the incorporation of meeting rooms, performance space and other civic spaces into library/community center
- Provide access to technology in meeting spaces (video conferencing, simulcasting, etc)
- Encourage the creation of performance space
- Exhibit space for local artists
- Access to focused collections of books, DVDs, music, etc., and as a pick-up and drop-off location for materials from other Minuteman Network libraries
- Staffing by trained information specialists dedicated to the local community
- Collaborate with SCAT to provide community access to software and hardware resources
- Use space to bring civic services into community (city services, aldermen office hours, etc)
- Offer education amenity spaces to bring classroom learning opportunities into the community and provide alternative spaces to school classrooms
- Community space to include a community kitchen
- Enhance and encourage youth programming
- Provide educational, recreational, and entertainment type programming and classes targeting all age groups and socio-economic levels
- An Integrated Community Center (immigrants/ non-immigrants) for sports/ recreation (indoor soccer), kitchen, ESOL classes, space for children/elderly to play/spend time, with information available about city/nonprofits/other agencies services - open to everyone- services in several languages



## Related Selected Cards

- SV-2 Place Values
- E/C-2 Historic
- E/C-3 Arts/Culture
- E/C-6 Public Service Space



## PI-4 Green and Open Space

- Keep working toward SomerVision target for open space, close to 20 acres for Boynton and Union square.
- Encourage investment in large scale city green and open space (example: Foss Park)
- Create active parks, playgrounds, sports fields
- Create passive parks / open space
- Create plazas, areas for people to gather, sit, eat lunch etc.
- Create ecological space
- Community gardens
- Create bike/greenway
- Create Shared Open Space which is shared between pedestrians, bikes and vehicles emphasizing sidewalk gardens and other green spaces instead of concrete.
- Consider publicly owned open spaces vs. privately owned open spaces vs publicly accessible open spaces (with restricted hours of access for public)
- Encourage green roofs / rooftop gardens
- Encourage green alleys/pedestrian walkways
- Opportunities for street activities, festivals, arts programming, celebrations etc.
- Stormwater as a resource not a nuisance including plans for all new building
- Develop incentives for development of different types of spaces
- Encourage buildings to be set back from roadways and for sidewalks to be separated from auto and bicycle traffic by grass or plantings
- Tree wells with native trees
- Bioswales; Rain gardens; Green walls



## E-1 Export Employment

- Ensure there is substantial commercial development as compared residential development (ensure a balance along the lines of the SomerVision goals for Union Square)
- Encourage small start-up type employment with high export products
- Create, attract and retain locally owned export job businesses
- Encourage diversity in businesses to prevent against market changes impacting one particular business type
- Support businesses unique to Union Square, building upon existing strengths (Artisan Asylum, Greentown Labs, etc.)
- Determine scale of export employment needed. Is convention or corporate headquarters an appropriate scale or market opportunity for Union Square
- Encourage preference for local hiring practices
- Develop creative solutions to generate Class B office space on spec that is flexible and can rent for the equivalent of
- Renovated or converted older, fully depreciated office or industrial space
- Develop zoning alternatives for truly mixed-use space (office / residential) that has convertibility within certain covenants
- Discourage any job creation that brings low-wage jobs or jobs in sub-standard environments



## E-4 Local Employment

- Ensure there is substantial commercial development as compared residential development (ensure a balance along the lines of the SomerVision goals for Union Square)
- Create legacy district historic fund (based on San Francisco model offering financial assistance to landlords giving long term leases to legacy businesses)
- Support local incubators and the spaces they occupy; including multi-use food incubator space
- Develop preferences for local hiring and workforce training programs
- Support for local businesses during pre-construction, construction phases (temporary signage, promotions, bridge financing etc) and post-construction phases of the development
- Support local artists and continue to foster creative economy
- Preserve independent retail, discourage chain retail
- Develop a loan fund for providing capital loans for start ups start-ups or business expansions in Union Square
- Expand Small Business Assistance Program to fund technical and financial mentoring to current local, small, and minority-owned businesses
- Prevent small business displacement by subsidizing rents for local businesses in a designated percentage of commercial space
- Discourage any job creation that brings low-wage jobs or jobs in sub-standard environments
- Establish minimum hiring requirements for people of color, women, and Somerville residents
- Promote and fund technical assistance to cooperatively owned business start-ups or cooperative business conversions
- Create subcontracting and purchasing policies that allocate a certain percentage of contracts awarded and purchases made to local businesses, women-owned businesses, people of color-owned businesses, worker-owned businesses and businesses complying with green practices
- Recognize the benefits a library in Union Square can provide the local business community, *free of charge*
- Support living wage provisions
- Support collective bargaining



## Related Selected Cards

- E-2 Regional Employment
- E-3 Construction Phase Employment
- PI-9 Training



## PI-6 Parking and Traffic Mitigation

- Develop parking strategy for short, medium and long term which can adapt as parking demand changes (and likely diminishes) over time
- Require developers to engage in documented traffic studies prior to approval, and perform monitoring of traffic levels after the fact.
- Studies should relate to overall, comprehensive parking strategy, and avoid requiring each new project to create new parking in an uncoordinated fashion.
- Collect funds for traffic mitigation implementation if levels are above the agreed rates and allow for refunds or other transfers if they are not necessary.
- Investigate use of innovative parking solutions such as automated parking towers
- Create strong programs to encourage alternative modes of travel to, from and throughout Union Square
- Consider parking as part of the larger walkable urban character discussion rather than treating it as an independent issue.
- Develop traffic circulation strategy that discourages high-speed through traffic by cars and encourages comfortable pedestrian and bicycle traffic.
- Immigrants travel a distance to purchase specific cultural items, consider parking affordability and of easy accessibility, as well



## PI-1 Water, Sewer and Electric

- Integration of Community with Routine DPW Work – The City of Somerville currently integrates the community for long-term projects, but often daily DPW maintenance provides opportunities to improve our city, particularly our residential neighborhoods.
- Rather than defaulting to always putting things back the way they were (paving), the City should implement innovative processes to make incremental improvements. This ranges from planting (or at least not cutting down) greenery, to more broad-reaching issues such as traffic calming measures.
- Known processes should be established for a residential street to request and coordinate with the City (including at the DPW level) to implement traffic calming and other micro-local measures when roads and sidewalks are torn up.
- Set up a website to provide accurate and up-to-date status reports and projected outage times for current and upcoming road and sidewalk projects or other DPW work which impacts residents.

## PI-11 Smart City Infrastructure

- Develop programs to support the physical implementation plan to develop the “backbone” connection to the Internet, fiber optic connections, and community broadband
- Improve and expand open data and smart sensor technologies, which don’t necessarily require new services and more about increasing efficiency



## Related Selected Cards

- PI-2 Intra-Core Transportation System
- PI-3 Transportation to the Place
- PI-5 Security/Cleanliness/Environmental Mitigation



## H-2 Low Income Housing

- Determine specific percentage of new housing, both rental and ownership units, to be developed for low and moderate income housing (80% or below AMI). A low percentage of these units to be available to Somerville residents.
- Ensure family housing to be built as part of low income attached housing (see below for specific Family Housing Strategy Card)
- Require variety of housing types/incomes to be constructed jointly rather than as separate developments
- Agree upon a percentage of affordable units to be reserved for seniors and people with disabilities
- Require just-cause eviction clauses for all affordable developments
- All affordable units are permanently affordable
- Create provisions whereby tenants of affordable units whose income or assets increases have their rent readjusted to reflect a higher income-tier of affordable housing, and tenants whose income decreases are eligible for lower income-tier units or rents on their current unit
- Affordable units be preferentially available to Somerville residents at risk of displacement and those who have been recently displaced.
- Establish a Land Trust to own and operate low- and moderate-income housing (see below for specific Land Trust Strategy Card)
- Investigate the possibility of funding the construction of low-income housing through the allocation by developers of future revenue from low-income-housing tax credits they will receive
- Preserve the diversity of Union Square by creating conditions for people from diverse backgrounds to stay there- affordable housing is fundamental also for local businesses to survive



## Related Selected Cards

- H-1 Homeless Housing & Services
- H-3 Existing Low Income Housing Maintenance
- H-4 Market Rate Housing
- H-5 Workforce Housing
- H-7 Family Housing



## R-3 Local Serving Retail

- Ensure there is substantial commercial development as compared residential development (ensure a balance along the lines of the SomerVision goals for Union Square)
- Encourage missing level of services in Union Square including hardware store, pharmacy
- Provide affordable space for key local-serving service businesses
- Develop programs to help current small retail businesses and prevent being priced out due to rent increases
- Create robust support system, training and coaching for small businesses
- Prevent small business displacement by subsidizing rents for local businesses in a designated percentage of retail space
- Conduct community surveys to determine desired retail use
- Give priority in the new spaces to local entrepreneurs



## Place Management Cards

- I-1 Non-Profit Implementation Organizations
- I-2 Catalytic Developer
- 1-3 Community Benefits Agreement
- I-4 Open Data Policies
- I-5 Land Trust
- I-6 Developer-Funded Benefits



## What is Missing?

### New Card: Sustainability/Climate Change

*Ensure that all practices from planning, through construction and up to implementation take into consideration environmental sustainability, reduction of carbon use, and preparation for future climate change.*

- Reductions in greenhouse gas emissions in existing and future buildings
- Ensure that infrastructure is built using environmentally-friendly building practices
- Ensure that all landscaping follows sustainable landscaping methods
- Ensure that all buildings take into consideration future climate change
- Promote transportation modes that decrease greenhouse gas emissions in Somerville



## Cards that received very little attention

- Education (Higher Ed, Primary and Secondary)
- Marketing/Communications
- Long-Term Planning and Governance Reform
- Metropolitan Values



## Strategy Leader Cards Point of Contact

Strategy Card	Strategy Leader	Strategy Card	Strategy Leader
C-2 Walkable Urban Character		R-3 Local Serving Retail	
PI-4 Green and Open Space		PI-1 Water, Sewer and Electric	
E-1 Export Employment		PI-11 Smart City Infrastructure	
PI-6 Parking and Traffic Mitigation			
H-2 Low Income Housing			
E-4 Local Employment			
E/C-5 Library/Community Center			



## **Union Square Strategies** **and Public Benefits**

**January 14, 2016 –Argenziano School**

### **Agenda - Session #2**

- Welcome and Review of Priority Strategy Cards
- Update on Fiscal Cost of Strategy Cards (Carson)
- Breakout Session
- Working Dinner: Group Reports
- Group Discussion on Low Priority Strategy Cards
- Group Discussion on Role of Place Management Organizations/ Ensuring Accountability
- The Impact of the Public Benefit Process on Future CBAs
- Implementation and Next Steps
- Group Reflections
- Closing Remarks

## Strategy Card Priorities

Strategy Card	Rank (1-7)
Civic Space/Library	
Green and Open Space	
Economic Development	
Parking and Transportation	
Smart City infrastructure	
Housing	
Place Manager	



## Strategy Card: TEMPLATE

**Strategy Objective:**

1. EXAMPLE
2. EXAMPLE

**Action Plan (How to Achieve the Objectives):**

1. EXAMPLE
2. EXAMPLE

**Estimated Cost of Implementation:**

**Who is responsible for implementation (Please circle one):**

City
  Place manager/Public Benefits
  Strategy Leader
  Other

*If other, please describe:*

**Funding/Financing Option (Choose One):**

City
  CBA
  Other

*If other, please describe:*



## Strategy Card: Civic Space/Library

**Strategy Objective:**

1. To create a multi-functional civic space that focuses on educational, social, and cultural activities
2. To create a 21st century library experience
3. To create a public accessible space for small businesses, startup and maker communities

**Action Plan (How to Achieve the Objectives):**

1. Develop strategies to incorporate library and other public civic space into new development

**Estimated Cost of Implementation:**

19,000 Sq. Ft. @ \$596 per SF = \$11.3 million

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## Strategy Card: Civic Space/Library

**Who is responsible for implementation (circle all that apply):**

City

Place manager/Public Benefits

Strategy Leader

Other

*If other, please describe:*

**Funding/Financing Option (circle all that apply):**

City

CBA

Other

*If other, please describe:*

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## Strategy Card: Green and Open Space

**Strategy Objective:**

1. To ensure proper implementation of the neighborhood plan and zoning code in relation to open space.
2. Proper management of open space

## Strategy Card: Economic Development

**Strategy Objective:**

1. Maximize the recruitment of a diverse set of businesses from the export economy
2. Ensure diverse set of job opportunities for local residents through workforce training

## Strategy Card: Parking and Transportation

**Strategy Objective:**

1. To maximize parking within Union Square through effective management
2. Ensure greatest level of sharing and increase flexibility of parking structures for other uses

## Strategy Card: Smart City

**Strategy Objective:**

1. Ensure the highest quality of internet connectivity in Union Square

## Strategy Card: Housing

**Strategy Objective:**

1. Ensure the greatest level of housing production for the middle class and low income
2. Provide a good mix of housing types including family, market rate, senior, and attainable housing

## Strategy Card: Place Manager

**Strategy Objective:**

1. Have a fulltime accountable entity that implements and monitors the place based strategy
2. Maximize the social equity, economic, and climate impacts in Union Square.

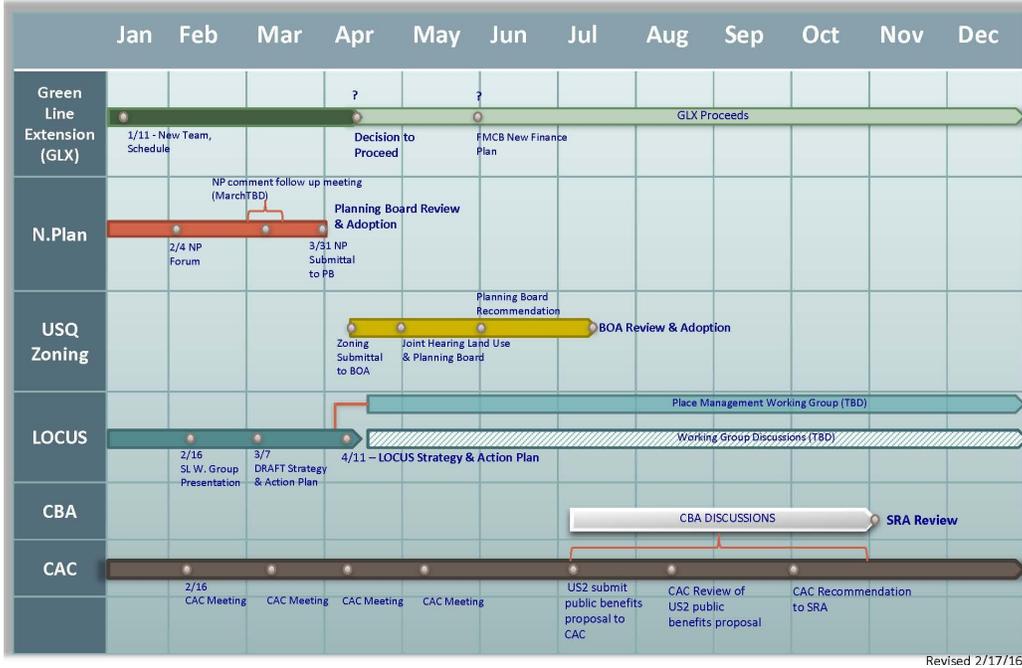
## Cost Summary

Strategy Card	Cost
Civic Space/Library	19,000 Sq. Ft. @ \$596 per SF = \$11.3 million

# Appendix E: Union Square Strategic Planning and Community Benefits Process (February 16, 2016)

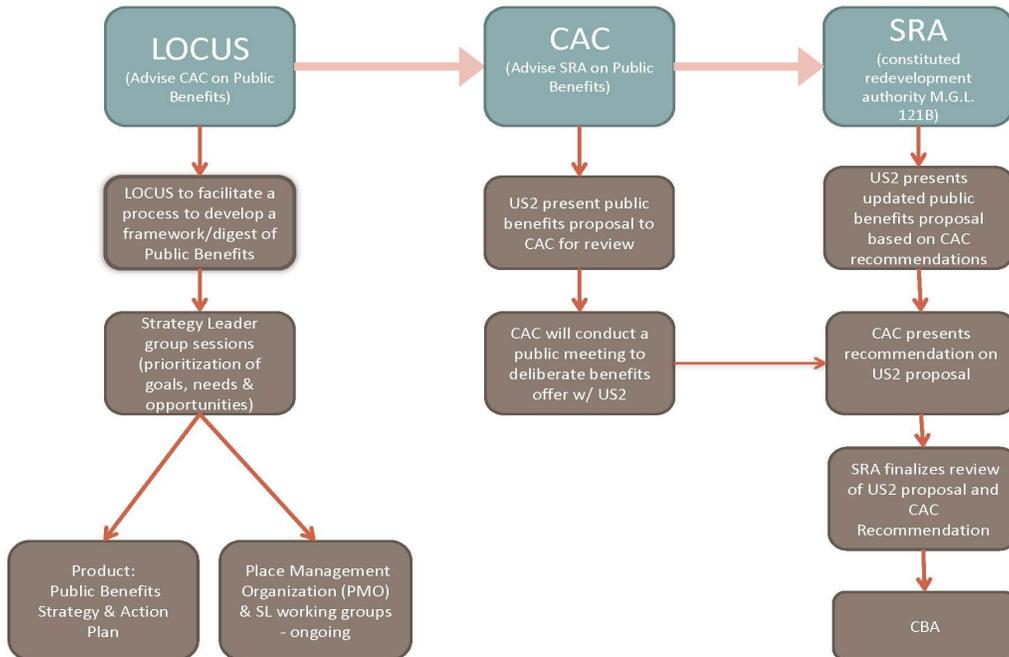
For discussion purposes only; subject to change

## Union Square Schedule



Revised 2/17/16

## USQ PUBLIC BENEFIT PROCESS



## **Appendix F: LOCUS Working Group Write-ups Submitted after the February 16 LOCUS Meeting**

### **Economic Development Working Group Notes**

The LOCUS Economic Development Working Group Meeting was held 10am – 12pm, Saturday, February 13, 2016 at the Somerville Chamber of Commerce, 2 Alpine Street. Tom Bent, Laura Denison, Esther Hanig, Van Hardy, Greg Karczewski, Max McCarthy, Bill Shelton, Wig Zamore and Stephen Mackey were present. Stephanie Hirsch, Meredith Levy, Karen Narefsky, Courtney O’Keefe, Emily Reichert, and Don Warner were not present.

Goal: Create a comprehensive approach to new jobs and employment opportunities that involve all three levels of employment (export, regional and local).

Neighborhood Concept: Develop the Union Square / Boynton Yards neighborhood into a significant employment center able to support and sustain diverse businesses at all stage of growth; provide residents and local businesses with opportunities to work and grow; and create new commercial taxes that expand city services.

Initially focus on drawing off demand for small to medium sized office and lab tenants located in other parts of the Metro (Kendall Square) with the idea that once the neighborhood gets traction as an employment center, larger/anchor companies can be attracted.

The economic potential of Union Square / Boynton Yards is found in its unique community character and its urban core address – a genuine cultural neighborhood amid regional, global players and amenities. We should aim to create an ecology of firms of different sizes, stages of development, and complementary services.

#### **Preliminary Action Items:**

##### **Attract Employers**

- Examine strengths/weaknesses of Union Square as a destination for potential employers.
- Research precedents for other employment districts.
- Establish a neighborhood “director of economic development” to promote and serve as the nexus between community, city and developers in formulating and implementing a neighborhood economic development approach.
- Develop a tax incentive program to attract initial (upper story) companies to Union Square to create initial critical mass.
- Leverage proximity to Kendall Square and Boston employment centers.
- Invest in infrastructure aimed at attracting businesses (e.g. fiber, shuttle to/from Kendall, etc.).
- Establish a recruitment team.

### Workforce Development

- Support efforts to implement high school and community college training programs.
- Pursue partnerships with area businesses and institutions to scale up effort.
- Focus on preparing residents to obtain good jobs in Somerville and adjoining employment centers using existing workforce development programs such as the First Source Jobs Program.

### Local/Independent Businesses

- Perform a threat assessment for local businesses to understand greatest risks
- Pursue policies and programs to support local businesses (e.g. fabrication district, tax incentives for benevolent landlords, tax discounts for specific new space in development targeted at local/independent businesses, etc)
- Expand and strengthen technical assistance to interested and engaged current local businesses to help them take advantage of the changing market to strengthen their financial viability
- Explore a very limited number of spaces, with affordable rents for a predictable period, and that those spaces would only go to businesses after a rigorous and comprehensive review of the factors involved, a market analysis of their customer base, a strong business plan, and a proven record of business acumen, commitment and follow through.

### Housing Working Group Notes

Group members: Scott Hayman, Patrick McMahon, Ben Echevarria, Joe Beckmann, Benny Wheat, Stephanie Hirsch, Wig Zagmore, Ileana Tauscher, Jhenny Saint Surin, David Gibbs, Regina.

Present at February 11<sup>th</sup> Meeting: Scott Hayman, David Gibbs, Ileana Tauscher, Jhenny Saint Surin, Stephanie Hirsch, Michael Feloney, City of Somerville, Alex Bob City of Somerville, Benny Wheat (short while).

Housing (*italics means added during 2/11 session; regular font originates from LOCUS meeting*):

- Ensure the greatest level of housing preservation and production for the extremely low income up to 170% of AMI.
- Provide a good mix of housing types, which is both attainable to and will accommodate families' and seniors' needs.
- Promote homeownership as well as rental housing opportunities.
- Encourage that local property management functions are local and accountability of property management to union square stakeholders.
- Streamline and ensure accountability of tenant and homebuyer marketing and selection policies and procedures for those opportunities that will be affordable (*attainable*).
- Gain long-term community control of certain percentage of land to be redeveloped

- in Union Square for family friendly housing development over time.
- In addition to redevelopment, focus efforts and resources on acquiring and rehabilitating existing Union Square housing stock.

Action Items:

1. Utilize existing housing trust fund but build both its staff capacity and financial resources to accomplish Union Square and Citywide goals. CBA proceeds, prorated portion of linkage and CPA proceeds and possible Union Square DIF proceeds should be developed and used for Union Square housing goals.
2. Establish a land trust for long-term community control of certain parcels that may be obtained through negotiations and planning with developers and city and state landowners. Capitalize land trust with housing trust fund and other leveraged resources.
3. Create a housing loan incentive program for Union Square to support both renters and owners including products such as soft second mortgages, loan loss reserves and guarantees, patient and deferred payment loans and grants.
4. Conduct a vulnerable populations audit for Union Square to measure impacts of Union Square re-development.
5. Create local policies to maintain affordability for current residents.
6. Determine feasibility of a transfer tax
7. Provide density bonus/up-zoning opportunities.
8. Obtain survey results from US2 of amenities needed for family housing.
9. Develop housing resources and assistance from local universities and colleges.

Implementation:

The housing working group considered a place management hybrid for the implementation of the goals for housing including work by the Somerville Housing Authority, city/state financing, through City Linkage and CPA funding, the Sustainable Community Committee's proposed transfer tax and through developer support. They recommended pursuing funding and financing through local universities who might be uniquely positioned to provide support for housing. Additional discussion included utilizing a portion of the DIF proceeds to capitalize the housing efforts. More time will be allotted in the near term to establishing a budget for accomplishing the housing strategy but it is certain that considerable resources will need to be devoted to operations (staff) in addition to initial and ongoing capital for production, acquisition, rehab, subsidy and lending.

**Green and Open Space Working Group Notes**

Updates:

We met before the latest iteration of open space planning was unveiled at the neighborhood plan meeting the next evening Feb 4. That plan is moving in the right direction looking for ways to add open space. It illustrates that increasing the park space does not impair the quality of the development.

#### Need for Open Space:

We confirmed our commitment to the goal of 30-34% open space in the Union Square area. This equals approximately 20 acres. The percentage goal should hold each development responsible for developing or contributing their share of open space. But the target of overall new acres is critical to achieving the Somervision goal of 125 new acres of open space. Equally important is our conviction that the Union and Boynton neighborhoods will be better places with more green space.

We agreed on the need for a portfolio of open spaces and the need to clarify goals for how much of what kind we want. We will work to refine the list, include dimensional targets and amounts of green in the areas.

- Lush quiet spaces
- Wilder ecological spaces
- Plaza spaces
- Water spaces
- Playgrounds, sized and distributed to meet best practices
- Playing fields, basketball courts, etc.
- Connecting paths
- Dog parks?
- Urban Farm and Community Gardens

We would like to see some statistical objectives: 10,000 people = x courts, dog parks, plazas etc. We will continue to research best practices, statistical goals, and public health data.

We agreed that the sidewalks, traffic islands, and shared streets should not count 1:1 towards open space targets. Roof decks should be encouraged but not count as equal to ground level parks. The Open space requirements size, location and design, should be built in to the entitlements and not a matter of negotiation parcel by parcel. We need design standards and guidelines established soon, including for air quality and pollution exposure mitigation.

#### Location of City-wide assets of open space:

We would like to work with the city to understand open space planning for the city? If needs will not be met at Union and Boynton, then where and when? The need for recreation fields is critical, particularly given the conversion of Lincoln Park, and the High School's growing needs and pending renovations. We would like to work with the city to establish a plan for meeting those needs. The current open space and rec plan lists the needs but does not tie into the city planning for transformational districts.

#### Stormwater management goals and plan:

We believe the city needs a plan for storm water management. This should include estimates of rainfall, projection goals for handling surface water, areas needed for infiltration, etc. We need developed design standards, and quantified goals for -

- Absorption areas

- Miller's river plan
- Private property incentives
- Street design and tree well standards

Possibly Enterprise funds can be used fund storage solutions

Acquisition strategies:

We discussed models for acquiring open space,

- CPA as a revolving fund,
- Land trusts (like DSNI),
- Transfer fee monies for acquisition.

Roles and Responsibilities:

We need to create a clear plan for who is in charge of what? PMO, Owners, City, Rec Dept., DPW? It was proposed that the City needs a Parks and Rec department.

- Management and maintenance of open space
- Assuring public access
- Stormwater management standards
- Programming
- Direct citizen participation

We discussed possible roles of a PMO:

- Watchdog on quality design
- Provide expertise on design for health, air pollution mitigation
- Overseeing management and programming
- Manager for acquisition funds?

Community engagement and participation:

- Urban Agriculture Ambassador program
- Urban Park ambassadors
- 20 people/30 hours/year/ community service
- High school community service/ District court community service
- UROP: Undergraduate Research Opportunity Program (Tufts? BU)

Civic Space Working Group Notes

### Civic Space

Program Element	Features	Priority	Location
Meeting / Performance space / Community living room	Spaces for small and large groups, performance space / Community living room space	1	Above ground
Welcome Center / Community leadership program	Information for new residents about housing, schools, ESL, healthcare, etc. / Community leadership program to develop new residents	1	Below ground (in GLX Station)
Daycare center	Affordable daycare center for residents	1	Below ground (in GLX Station)
Shared retail space	Affordable retail space with shared amenities	1	Below ground (in GLX Station)

Priority key: 1=Critical (doesn't exist, or is inaccessible to all); 2=Valuable (might already exist, but need more of); 3=Dispensable (exists in some capacity, and more not needed)

### Civic Space

Program Element	Features	Priority	Location
Community kitchen and Café	Community kitchen and café that also serves as an incubator for food start-ups	1	Above ground, except for café, which is below ground (in GLX station)
Teen community room	Dedicated space for teens to hang out after school and weekends, with programmed activities aimed at their age group	1	Above ground
SCATV Offices and Studio	Production environment that also serves as a community resource offering courses and instruction on digital media	1	Above ground

## Civic Space

Program Element	Features	Priority	Location
Rec Center	Rec center featuring a pool, basketball court, and fitness center	2	Above ground
Branch library	Branch library featuring focused print and digital collections, that also provides programming for children, teens, and adults	2	Above ground
Small business incubator	Small business incubator, which includes job / career training center	2	Above ground
Health Clinic	Health clinic providing affordable treatment options for residents	2	Above ground

Priority key: 1=Critical (doesn't exist, or is inaccessible to all); 2=Valuable (might already exist, but need more of); 3=Dispensable (exists in some capacity, and more not needed)

## Potential Partners

Somerville High School	Union Kitchen
Vocational Program	MBTA
Steam Academy	US2
SCATV	Early Head Start / CAAS
Library	Don Law
Cambridge Health Alliance	Artisans Asylum
YMCA	Welcome Project
Arts Council	Foundations
Council on Aging	Teen Empowerment
Boys and Girls Clubs	Local universities
Stage Source	Greentown Labs

## Participants

Joe Beckman

David Gibbs

Glenn Ferdman

Irma Flores

Stephanie Hirsch

Erica Jones

Nick Schonberger

Wendy Wood

### Parking, Transportation and Mobility Working Group Notes

#### Thoughts:

- A Union Square Parking Authority needs to have capital control and ownership of the facilities.
- Goal of 80% of district parking need to be owned by the agency and 100% managed
- This includes on-street parking and meters (and pricing of meters)
- It needs to be able to set pricing.
- Pricing should follow a demand-based scheme that:
- Minimizes auto-trips
- Maximizes revenue to feed to the broader Place Management of Union Square
- Guarantees X% of parking available at all times to minimize added miles from “hunting” for parking

#### Future parking facilities should be:

- Short-term: central and shared (minimal single-parcel and zero single business/residence)
- Mid-term: favor automated parking structures
- Long-term: favor automation and self-parking
- One opportunity of ownership of the facilities is flexibility for future conversion:
- As demand shrinks and parking square footage can become more dense, structures should have the capability for re-use

- Flat with minimal ramps
- Designed with flexibility in mind
- Potential very long-term use as open space

Funding:

- Because this is capital-intensive, construction can be funded via a DIF/TIF
- Operations can be paid for by a base level of developer CBA funds as a short-term bridge to be replaced with parking revenue
- Parking revenue will repay the financing, after that will pass to the Place Management Organization after covering expenses
- Some initial capital costs can be contributed by developers in lieu of their parking requirements, accelerating the financing payoff

The Ranked Goals of the Parking, Transportation, and Mobility Working Group:

- Ensure the realization of the Union Square spur of the GLX at full functionality.
- Minimize personal vehicle trips generated by Union Square as feasible over time, particularly single occupancy vehicle trips.
- Enhance the physical space of the district by enabling the physical street network and nodes to service active uses over vehicular use.
- Generate revenue for other Union Square priorities in the course of meeting the above goals.
- Push for forward-facing technology such as smart traffic lights.

The Ranked Strategies (1-3 by chronology,4-7 by priority) of the Parking, Transportation, and Mobility Working Group:

- Mobilize advocacy to ensure the realization Union Square spur of the GLX at full functionality.
- Without true light rail, Union Square cannot develop as a commercial center.
- Coordinate with the City to initiate and manage mobility, traffic, and parking studies.
- The impact on immediate and long-term development must be understood.
- Coordinate informed feedback on the Neighborhood Plan, Developer Plans, and MBTA plans.
- Complete street implications of street design, including use renegotiation to enable widening if needed, redesign of bus routes and hub(s), bike parking, Hubway stations, Zipcar locations, ride sharing drop-off locations, parking structure locations, etc.
- Develop a Transportation Strategy for Union Square, and create a Parking Authority (PA) and a Transportation Management Authority (TMA) to execute it and maintain it.
- The interconnected and dependent nature of goals 3 and 4 above imply that they should be integrated in some way with the Place Management Organization (PMO); the TMA will need to have a larger geographic scope, e.g. the Somerville Ave-McGrath arc across Davis-Union-Inner Belt-Assembly.
- The PA should have capital control (ownership) over shared district parking structures at the periphery of the Square, which should be built with the intent of flexibility to adjust to new technologies that allow for greater density (self-parking

- cars) as well as long-term convertibility to other uses.
- Ownership is critical to allow the PMO to make the best use of space over time, rather than having to mitigate many private interests.
- The PA should control pricing over 100% of parking in the District, including any non-owned facilities and street parking.
- Demand-based pricing is likely to be critical to Goals 2-4 while ensuring the availability of parking at all times.
- The financing mechanisms should be designed to align with the above goals and strategies.
- While the group does not have recommendations yes, multiple options are available including a combination of DIF/TIF and developer contributions

## Smart City Infrastructure Working Group Notes

Based on Locus Strategy Card: PI-11. Drafted following 2-9-16 working group meeting (Pat McCormick, Anne Tate, Anne Stephens Ryan, Joe Beckmann, Philip Parsons)

Vision: create a Union Square Urban Innovation Hub to improve quality of life, bolster social capital and community resilience, attract great jobs, and spark collaboration between government, community, and the private sector to use new technologies to realize strategic objectives (Somerville Vision, USQ Neighborhood Plan, LOCUS, etc.) that will inform new initiatives and services across the city and beyond.

Smart City definition (Deloitte 2015): a city is smart when investments in (i) human and social capital, (ii) traditional infrastructure and (iii) disruptive technologies fuel sustainable economic growth and high quality of life, with wise management of natural resources, through participatory governance.

### Goals

- Economic growth
- Quality of life, a good city to live in
- Ecological footprint, sustainability

### Challenges:

- Social cohesion, inclusiveness
- Secure digital environment, privacy
- Resilience

### Components:

- Smart Mobility, Smart Energy, Water & Waste, Smart Safety, Smart Buildings & Living, Smart Health, Smart Education, Smart Finance, Smart Tourism & Leisure, Smart Retail & Logistics, Smart Manufacturing, Smart Government.

Objectives: provide open technologies, connectivity, and policies to support a shared civic innovation platform that

- Plans well to get maximum benefit from investment and development - requires

- cross boundary/discipline urban planning effort (break down silos)
- Puts citizens and human infrastructure at the center of design and implementation
- Ensures better range of high-speed connectivity options to residents, businesses, city and free Wi-Fi access in key locations
- Enables data driven decision making (efficiency and effectiveness), 311 interoperability (PMO, public, developer read/write access)
- Enables city, community, and private sector apps, innovation, activities
- Improve resident and local business experience during and following construction through smart management and communication of traffic disruptions, etc.
- Serves as a laboratory for new ideas and initiatives that could spread across city, region, world
- Provides an urban commons to support shareable physical and digital assets and exploits excess capacity to benefit residents and visitors
- Builds City capacity to ensure broader, lasting, sustainable benefits
- Ensures investments serve full community through transparent, iterative, collaborative policies and processes
- Incorporates best practice security, privacy, and reporting services and practices
- Eliminates digital divide, fosters social inclusion, supports community resilience (social equity)

Prioritized (and sequenced) actions:

High

1. Establish City PoC(s) for Smart City infrastructure planning (City)
2. Establish working group with representation by City, community, US2, experts (all)
3. Establish think first “dig once” processes - permitting contingent on installation of conduit and fiber being incorporated into all road, water/sewer work (City)
4. Identify “backbone” connection to Internet, fiber, conduit, community broadband - engage MBTA and other key partners (WG w City)
5. Develop, publish open data, privacy/security requirements and policies (WG w City)

Medium

6. Draft design/implementation plan that identifies existing and new assets and sequence, timeframe required (TBD)
7. Identify open access and interoperability standards for hardware, software, and data levels to optimize innovation and sustainability
8. Develop cost estimate for capital and operating expenses with target funding sources, cost savings, and revenue potential (TBD)
9. Identify key requirements to improve city services and foster civic and private sector innovation (WG w City)

Low

10. Establish innovation task force to inform working group, City (consider Chief Innovation Officer role), community, SHS students, recruit external resources (HKS/ Ash Institute, MIT, Code for America, etc) (WG w City)
11. Crowdfund smart city community manifesto that correlates to Somerville, Neighborhood Plan, Locus strategies, etc. (WG)
12. Identify and establish institutional and private partners (WG)
13. Create links with 311 and ResiStat to ensure interoperability, shape development

(WG w City)

Role and responsibilities (WIP):

These roles, borrowed from Deloitte, are identified below as being allocated to the City and PMO. Given limited resources roles within City Hall, any roles that can be reasonably outsourced are identified as PMO. There could be other options and regardless of whether roles are placed under City Government, a PMO, or another organization, some new levels of expertise and experience may be required.

1. Strategist and advocate (PMO) - sets out a clear direction for the city: what is our vision and ambition as smart city and how do we want to realize this? Furthermore: be an active advocate of the city as innovative hub for new business.
2. Solution enabler (PMO) - build ecosystems by gathering parties that normally do not work together to deliver creative new solutions that neither of the parties could have realized on its own.
3. Steward (City) - create an environment in which new businesses and smart solutions can emerge and grow. For example by providing 'open data' and by facilitating start ups.
4. Director and regulator (City) - create or change laws and regulations to allow new business models and disruptive entries, and simultaneously protect the interests of citizens and users of the city.
5. Connector and protector (City) - secure modern transportation infrastructures, energy grids and digital networks. Set standards and take measures to make these vital infrastructures resilient and safe.
6. Innovator and investor (PMO) - apply the principles of innovation in the internal organization and processes. Stimulate innovative solutions by acting as launching customer.

Initial financial and resource needs (TBD)

What time frame does "initial" cover?

Capital vs. operating costs

Potential for revenue producing, cost savings, sources

Additional Notes:

ASR input (1/16): Interest in IT and IoT security has been forced on me by long term lack of personal safety and privacy. That is cyber-based. Here are 3 categories that might slot into your ongoing work: 1) Human Infrastructure; 2) Reporting (including self monitoring of IT equipment); 3) Costs of Security

1. Human Infrastructure (HI) (needed to support Smart Cities). In my personal experience HI is barely operational. That is, people who can relate an apparently minute event noticed by an individual person to generic IT operations, information networks and management entities responsible for ongoing operations. I found myself writing "who" next to several of the categories you itemized.
2. Reporting. From (1), reporting is clearly a needed socio-technical (!) skill. At the consumer/ citizen end of the reporting spectrum, not a single local, state, business

bureaucratic entity that I have gone to has so much as a form for capturing information about an IT related issue. At the federal level, there is considerable organization (CERT) (haven't been back to FTC or FCC in a long time). The State has nothing as far as i know. A smart city would recognize categories of security concerns and how to address them.

3. Costs. There are at least 5 categories that I can think of. 1) Locating relatively secure equipment; 2) developing solid oversight capacities; 3) insuring vulnerabilities 5) developing definitions of vulnerabilities; 5) Citizen/consumer costs. At the personal level, I cannot afford forensic analyses of my equipment and domicile. The current MO is for local police (who cannot provide services) to refer to the state. I have the added burden of managing lack of response to the issues i present and my equipment remains un-vetted.

What are Somerville's existing smart city components/assets?

- Physical infrastructure
- Website
- 311 / ResiStat, SomerStat
- City fiber network
- Traffic management systems
- DPW, Inspectional Services, Police activity and data (given certain protections)
- Library information system (government, library management, Minuteman system)
- SPS (particularly HS) computer and technology studies, activities
- Water/sewer (HI) calls regarding potential overuse of water

Required integration and new components:

- Smart street lighting
- Identity management

Smart City parking lot (related but separate issues/topics):

- Unified accessible City calendar

## Sustainability Working Group Notes

Preliminary Climate Change/ Sustainability Goals as laid out through the LOCUS public meetings:

Ensures that all practices from planning, through construction and up to implementation take into consideration environmental sustainability, reduction of carbon use, and preparation for future climate change.

- Reductions in greenhouse gas emissions in existing and future buildings
- Ensure that infrastructure is built using environmentally-friendly building practices
- Ensure that all landscaping follows sustainable landscaping methods
- Ensure that all buildings take into consideration future climate change
- Promote transportation modes that decrease greenhouse gas emissions in Somerville
- Actively increase the green space per capita in Somerville

City of Somerville Commission on Energy Use and Climate Change (CEUCC) Goals:

1. Net Zero Energy Buildings
2. Combined Heat and Power Systems
3. Combined Heat and Power-Based District Energy Systems
4. Zoning for Solar PV and Solar Thermal Systems
5. Solar-ready Buildings
6. Electric Vehicle Charging Stations

Laundry List of Priorities, based on March 8 + March 25 2016 meetings of Working Group:

Important to note that many sustainability objectives can be supported, amplified, quantified, and tracked through use of smart city technologies and services. Also, we are not talking very much at all about sustainable transportation. This will be addressed in the Parking and Mobility Working Group.

Action Item	How/What will fund/facilitate	Cost	Notes
Energy Options Analysis	LOCUS CB, City	\$100-\$200K	Should be completed before all energy asks can be known
Climate Change Preparedness Plan	LOCUS CB, City	A LOT	Should be completed before all climate change adaptation needs can be known
EV Charging Stations	LOCUS CB, Zoning requirement, developer requirement		
Solar PV and Solar Thermal Zoning Requirements	Zoning, developer requirement		
Combined heat and power	Zoning requirement, developer requirement		
District Energy	City?		
Community Shared Solar	LOCUS CB, Zoning Requirement		
Solar-ready buildings	Zoning		

Water analysis focusing on better-use in Somerville	City, LOCUS SB		
Increase underground water catchment tanks to pump water elsewhere, as well as better systems to manage flow within Somerville	Zoning, Developer Requirement		
Gray Water use in all buildings for toilet water	Zoning, ISD?, Health Dept?		
Water Load Analysis	City		
Disconnect the Down Spout	City, regulation		
Research into implications of climate change on flooding in the Miller's River	City		
Stormwater to street trees	Zoning, City		
Green roofs, green walls, real grass	Zoning, developer requirements; LOCAS CB in that developers could pay into a pot to help pay for some of these costs		
Set a standard for minimum environmental requirements (similar to GAR, but not a score, a standard for minimum mitigation) (for example, 50% native plants, 75% green, blue, white, or solar roofs, 50% permeable, etc)	Zoning, developer requirements; LOCAS CB in that developers could pay into a pot to help pay for some of these costs		
Fund to offset maintenance training for property management companies and City staff (to handle new kinds of infrastructure)	City, LOCUS		
Revolving Loan Fund to fund these kinds of infrastructure improvements	City, LOCUS		
Revolving Loan Fund to assist business tenants to offset potential increase in rents by developers to cover costs of infrastructure improvements	City, LOCUS		
Review of bid documents before they are approved to make sure they meet sustainability standards	City/Planning Board/ Commission on EE		

No cars on roof policy (instead green, blue, white, solar)	City, regulation		
City Contract requirements: grass, not turf, fuel for maintenance vehicles, stormwater management systems, native plants, permeable surfaces	City, regulation, zoning?		
Minimum % requirements for permeable surfaces on all public and private developments (must be maintained and reviewed regularly)	City, Zoning, Planning Board		
Definition of green space vs. open space vs. permeable surfaces	City, Commission		
Air rights over the Green Line tracks? Can we put solar arrays over the tracks? Along the retaining walls?	City? MBTA? MassDOT?		
Regenerative braking on Green Line?	City, MassDOT, MBTA		
Hubway station	City, Planning (a la PTDM Ordinance), LOCUS CB		
In-pipe hydropower on sewer drains			
Battery banks for renewable energy			
Residents must have access to a green space or community garden within the same proscribed ft as the playground ordinance	Regulation, zoning		

Links and Resources:

Smart Cities Coordination (from Pat McCormick)

- <http://www.slideshare.net/solutist/usq-cac-smart-city-jul15-small-50578305>
- <https://www.cctvcambridge.org/chase-mccormick>

Template regulations and toolkits

- [https://www.epa.gov/sites/production/files/2014-09/documents/sustainable-design-permitting-toolkit-06\\_27\\_13\\_formatted.pdf#page15](https://www.epa.gov/sites/production/files/2014-09/documents/sustainable-design-permitting-toolkit-06_27_13_formatted.pdf#page15)
- [https://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/Zoning%20&%20Environment/Files/pdf/B/biodiversegreenroofs\\_2013.pdf](https://www1.toronto.ca/City%20Of%20Toronto/City%20Planning/Zoning%20&%20Environment/Files/pdf/B/biodiversegreenroofs_2013.pdf)
- <http://www.cambridgema.gov/CDD/Transportation/fordevelopers/ptdm>
- <http://www.cambridgema.gov/CDD/Projects/Climate/netzerotaskforce>
- <http://www.cambridgema.gov/CDD/zoninganddevelopment/sustainablebldgs/buildingenergydisclosureordinance>
- <http://www.cambridgema.gov/CDD/zoninganddevelopment/sustainablebldgs/gree>

## [nblldgrequirements](#)

Sustainability around the US (from Joe Beckman)

- Sustainable Solutions Lab and UMass Boston: <https://www.umb.edu/ssl/about>
- <https://nextcity.org/daily/entry/california-cap-and-trade-revenue-benefits-affordable-development>
- [http://www.amazon.com/Sharing-Cities-Sustainable-Industrial-Environments/dp/0262029723/ref=asap\\_bc?ie=UTF8](http://www.amazon.com/Sharing-Cities-Sustainable-Industrial-Environments/dp/0262029723/ref=asap_bc?ie=UTF8)
- [http://now.tufts.edu/articles/sharing-future-cities?utm\\_source=Tufts+Now+-+External+and+Students&utm\\_campaign=a07ca4e21c-Tufts\\_Now\\_external\\_160210&utm\\_medium=email&utm\\_term=0\\_c17dba3525-a07ca4e21c-207420093](http://now.tufts.edu/articles/sharing-future-cities?utm_source=Tufts+Now+-+External+and+Students&utm_campaign=a07ca4e21c-Tufts_Now_external_160210&utm_medium=email&utm_term=0_c17dba3525-a07ca4e21c-207420093)
- <http://julianagyeman.com/blog/>

## Finance Working Group Notes

(Pending)

## Place Management Organization Working Group Notes

As previously noted, a subgroup of the PMO Working Group presented a recommendation that that an Independent Community Group (i.e., PMO) be a party to the negotiation and execution of any Community Benefits Agreement with any developer of land in Union Square/Boynton Yards. This recommendation will be addressed by the Strategy Leaders as whole, as part of their discussion on the proper PMO structure to carry out activities guided by the Union Square Strategy and Implementation plan.

## Place Management Working Group

February 16, 2016

Argenziano School

LOCUS UNION SQUARE PROCESS

## Schedule Challenges

### February 16

Working group presentations on action plans at public meeting including members of the public, Strategy Leaders and CAC members. Each group is asked to **present for 5 minutes** and hold an open discussion for 10-15 minutes with meeting attendees. The group is also asked to submit a **written summary** of their presentation.

### February 22

Each working group, including the place management working group, is asked to submit a **Write up of their action plans and recommendations**, including amendments or comments incorporated from the February 16th meeting.

### March 14

**Draft Strategic Planning and Community Benefits Action Plan** to be submitted to Strategy Leaders for review.

### March 25

Strategy Leader edits due to LOCUS.

### April 12

**Final document submitted to Strategy Leaders/City/CAC**

## Potential Alternative

### February 16

Summary presentation of discussion and research to date

Propose alternative parallel short-term strategy for US2 CBA negotiation team (CAC + LOCUS groups, with public input?)

### February 22

Write-up research to-date and probable direction of further research; schedule coordination meeting(s) with 6 sub-groups Draft CBA strategy for proposal to city, establishing collaborative strategy, including proposal for power sharing agreement

### March 14

Draft tentative proposal for preferred direction; identification of further research tasks to integrate concerns of sub-groups; Establish short-term CBA negotiation schedule; confirm standing of CAC + LOCUS group with city/SRA

### April 12

Draft submission to city of preferred strategy direction for formation of PMO; timeline for next steps – up to 18 months required for organization and implementation Initiate CBA negotiation

### May? – June? Etc.

Obtain city approval, establish legal status; seek grant funding for staff hiring, planning & implementation CAC + LOCUS continue to monitor and enforce CBA agreements

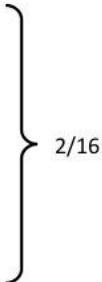
### Jan 2018?

Initiate PMO Dissolve CAC + LOCUS Group

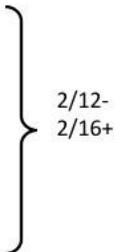
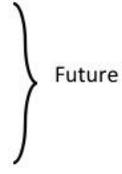
## Agenda for Working Group Meeting

- Introductions, task schedule – David 15 mins
- Presentation of alternative approaches to Place Management – Janne Corneil 20 mins
- Framing the task – Philip Parsons 20 mins
- Working groups to focus direction 25 mins
- Reporting back 15 mins
- Questions, observations, next steps - David 20 mins

## PMO Governance Immediate Agenda

1. Establish and report on preliminary preferences for Place Management organization in order to focus research and dialog
  2. Establish clear interim strategy for community role in CBA prior to establishment of Place Management organization
- 

## Longer-Term Agenda

- **Research Options** for long-term place management:
    - Purpose
    - Scope of influence or authority
    - Governance, Oversight, Funding, and Enforcement
    - Daily Operations
    - Geographical boundaries
    - Potential need for more than one organization
  - Select **Preferred Models**
  - Design the **Governance Organization**
  - Determine how to manage **Conflicts of Interest**
  - Determine **Scope of Daily PM Operations**
  - Determine **Funding Sources for Daily PM Operations**
  - **Influence CBD legislation** to craft it to our benefit
- 
- 

# Potential Models

	Business Improvement Districts (BID)	Community Development Corporation (CDC)	Neighborhood Associations (NA)	Community Benefits Districts (CBD)	Community Land Trust (CLT)	Parking Authority
Purpose	Enhance business climate through public improvement	Support community development typically in lower income areas	Organize local activities, provide a local community voice	Revitalization and place-making, beyond scope of BIDs	Stewardship of public land, civic amenities and affordable housing	Managing parking to enhance development opportunities and public benefits
Scope	Enhance city services in a defined area	Housing, economic devt, education, community organizing	Varied – often neighborhood activities, but can be much more	Essentially unlimited, as described in MA legislation S.2065 – but defined locally	Property acquisition, with ground leases	Development and operation of on-street and off-street parking systems
Organization		Non-profit	Non-profit	Non-profit	Non-profit	Could be for profit or non-profit; could be part of CBD
Relationship to city	State authorized; improves on baseline city services	ccc	Advisory	State authorized, close working relationship with city	Collaborative but independent?	Semi independent
Operations	Board and paid staff,	Paid staff	Volunteer staff	Paid staff, board	Board and paid staff, may sub development	Paid staff; sub-contracts for operations
Funding	Tax or levy typically based on assessed property values – owner occupied typically exempt	Grants, other	Voluntary dues, grants	Tax or levy based on assessed property values and other considerations – owner occupied typically exempt	Could be assessment on all property transactions	Initial funding through revenue bonds; would over time provide major positive cash flow to city
Membership	Required, with exemptions	No membership expectation	Voluntary	Required, with exemptions	Board representing local community, residents and users, and city	Paid staff and board
Establishment	Majority property owners majority support;			51% of property owners approval and other requirements; needs legislative passage	Requires initial capital	City initiative

# Choices



<b>Purpose</b>	Support community development typically in lower income areas	 <ul style="list-style-type: none"> <li>• We already have one - SCC – but it is city-wide, not district-focused</li> <li>• SCC focused on at risk population and advocating for affordable housing and jobs</li> <li>• Values closely aligned with UU attendees at PMO mtg</li> <li>• Can SCC be realigned as a PMO for Union Square? Or would we need a different CDC, with a broader scope and a district focus?</li> <li>• What is a relationship between a CDC and the City?</li> <li>• How would its purposes, governance, membership and governance be established?</li> </ul>
<b>Scope</b>	Housing, economic devt, education, community organizing	
<b>Membership</b>	Membership not required, no dues	
<b>Relationship to City</b>	Independent non-profit, collaborates with city	
<b>Operations</b>	Paid staff	
<b>Funding</b>	Grants, other	
<b>Establishment</b>	Federal tax exemption 501(c)(3)	

<b>Purpose</b>	Revitalization and place-making, beyond scope of BIDs, or city government	 <ul style="list-style-type: none"> <li>• Skewed representation, based on value</li> <li>• Gives disproportionate influence to large landowners in establishing priorities</li> <li>• Can have broad scope, but not necessarily focused solely on disadvantaged population</li> <li>• Would need major rewriting to be acceptable and appropriate to USQ</li> <li>• Could have considerable autonomy</li> <li>• Requires close partnering with city government</li> <li>• Significant funding could seed many types of project</li> <li>• Could include a parking authority</li> </ul>
<b>Scope</b>	Essentially unlimited, as described in MA legislation S.2065 – but defined locally	
<b>Membership</b>	Membership required, based on assessed value or square footage – possible exemptions	
<b>Relationship to City</b>	State authorized, close working relationship with city	
<b>Operations</b>	Paid staff	
<b>Funding</b>	Taxes/fees	
<b>Establishment</b>	51% of property owners approval and other requirements; needs legislative	

<b>Purpose</b>	Stewardship of public land, civic amenities and affordable housing	 <ul style="list-style-type: none"> <li>• Most popular model</li> <li>• Can support public amenities and open space as well as housing</li> <li>• Funding is initially challenging in Somerville, given the high cost of land (Dudley was able to acquire abandoned properties)</li> <li>• <b>WIG NOTES: Philip created a lot of Dudley Square Slides but I have condensed this for shortened presentation purposes</b></li> <li>• <b>Also many other neighborhood association models were not yet considered</b></li> </ul>
<b>Scope</b>	Property acquisition, with ground leases	
<b>Membership</b>	Board representing local community, residents and users, and city	
<b>Relationship to City</b>	Collaborative but independent?	
<b>Operations</b>	Board and paid staff, may sub development	
<b>Funding</b>	Could be assessment on all property transactions- eventually potentially self-funding	
<b>Establishment</b>	Requires initial capital	

<b>Purpose</b>	Managing parking to enhance development opportunities and public benefits	 <ul style="list-style-type: none"> <li>• Allows for increased development</li> <li>• Anticipates changes in car use and technology</li> <li>• Improves traffic management</li> <li>• Generates city revenue over time</li> <li>• Improves neighborhood walkability</li> <li>• Separates parking from development</li> <li>• Allows or management of on-street and off street parking</li> <li>• Could be run by city or semi-independent entity</li> </ul>
<b>Scope</b>	Development and operation of on-street and off-street parking systems	
<b>Membership</b>	Board representing local community, residents and users, and city	
<b>Relationship to City</b>	Semi independent, could be partially private	
<b>Operations</b>	Paid staff; sub-contracts for operations	
<b>Funding</b>	Initial funding through revenue bonds; would over time provide major positive cash flow to city	
<b>Establishment</b>	Requires city initiative	

## Purposes

- Need to balance priority of protecting vulnerable populations with other civic requirements
- Need to enhance attractiveness to investors while addressing community needs
- Preservation of community diversity a high priority
- Need to include environmental sustainability priority

## Governance

- Potential Initiatives to Look At
  - Hybrid
  - Combinations
- Requirements and Expectations
  - Non-profit – except perhaps for parking, if privatized
  - Major concerns about community representation, with some suggesting a strong emphasis in representation on vulnerable populations
  - Major expectation that PMO will have a strong measure of autonomy from city hall government
  - Major challenges in determining how PMO leadership will be selected
  - Wish to avoid duplicating the mayoral appointee model for the CAC and LOCUS

We collaborated in small groups to analyze the various models then shared our notes. Those notes are still to be synthesized, but here is an example from one working group.

## Purpose

- The future PMO will (NOTE: very much still a draft):
  - Represent the voice of the community as an equal with the city and developers, formalizing the rights and responsibilities of the community and creating a body that can negotiate and enforce agreements directly with the city and developers and hold the city (and its departments) and developers accountable
  - Be the torch-bearer of our community's values and priorities, ensuring that decisions are made and opportunities pursued in alignment to our values in the short and long term
  - Serve as an overarching body to help existing groups convene and collaborate, identifying what exists and where there are gaps so that we can leverage and amplify what we have in our neighborhood and fill in what's needed (either directly providing the service or indirectly and in collaboration with others)
  - Ensure transparency, tracking, and accountability by collecting data and feedback from individuals, developers, and the city (including its departments and the board of aldermen), synthesizing that information, and sharing it back out with all parties, while holding all parties accountable to their targets and goals

## Scope

- Values and Priorities: in addition to what follows below, set and hold design standards (architectural, landscape) and ensure sustainability, energy, environmental systems, and climate change aspects of all projects are evaluated
- Planning: short and long term, place-making, events, finances (economy), impact studies
- Quality of Life: social equity, anti-displacement, and other concerns that aren't covered by city services (such as 311)
- Other Strategy Working Group Strategies (including specific priorities identified within): Housing (including affordable housing), Economic Development (including small businesses and job training), Smart City Infrastructure, Parking and Transportation, Green and Open Space, Civic Space (including library)
- Other aspects/structures to be considered within this, such as a Community Land Trust and Parking Authority

## Organization

- 501(c)(3) non-profit organization with a board and TBD number of staff members

## Relationship to the City

- Independent and collaborative with existing city services/departments

### Operations

- TBD

### Funding

- Combination of TBD assessment of properties (nominal in amount, and not based on assessed property values), transfer tax, district improvement financing proceeds (community benefits from developers), and other sources, such as grants, in the long-term

### Membership

- All institutions and residents within the defined area (geographic boundaries TBD\*\*) would be required to participate (TBD exemptions possible)
- Board would be voted in by various constituencies (or appointed in some cases) to be representative of residents (owners and renters of various geographic neighborhoods or wards/precincts within the defined area) and institutions (including non-profits, local businesses, and existing neighborhood groups, as relevant, among others TBD)
- Ensure that constituencies (and therefore the board) are representative of the community
- Involvement by city and developer representatives suggested (clarity TBD)

### Establishment

- Memorandum of understanding with the city
- Possibly also use the Community Benefits District if amendments can be made to align to our values, and of course if the legislation passes

### Examples

- TBD

\*TBD = components that our group did not get to discuss in the allotted time

\*\*We should consider whether this is just Union Square or the area defined by the Neighborhood Plan (including Boynton Yards) and where the exact boundaries will fall.

The working group met again on March 14 where the group reviewed a “straw proposal” prepared by Wig Zamore that laid out a suggested structure for a place management organization. No decision was made with respect to this proposal; we agreed that it was a useful initial model of how we might approach the problem and helpful to establish the rights and responsibilities of the community with others.

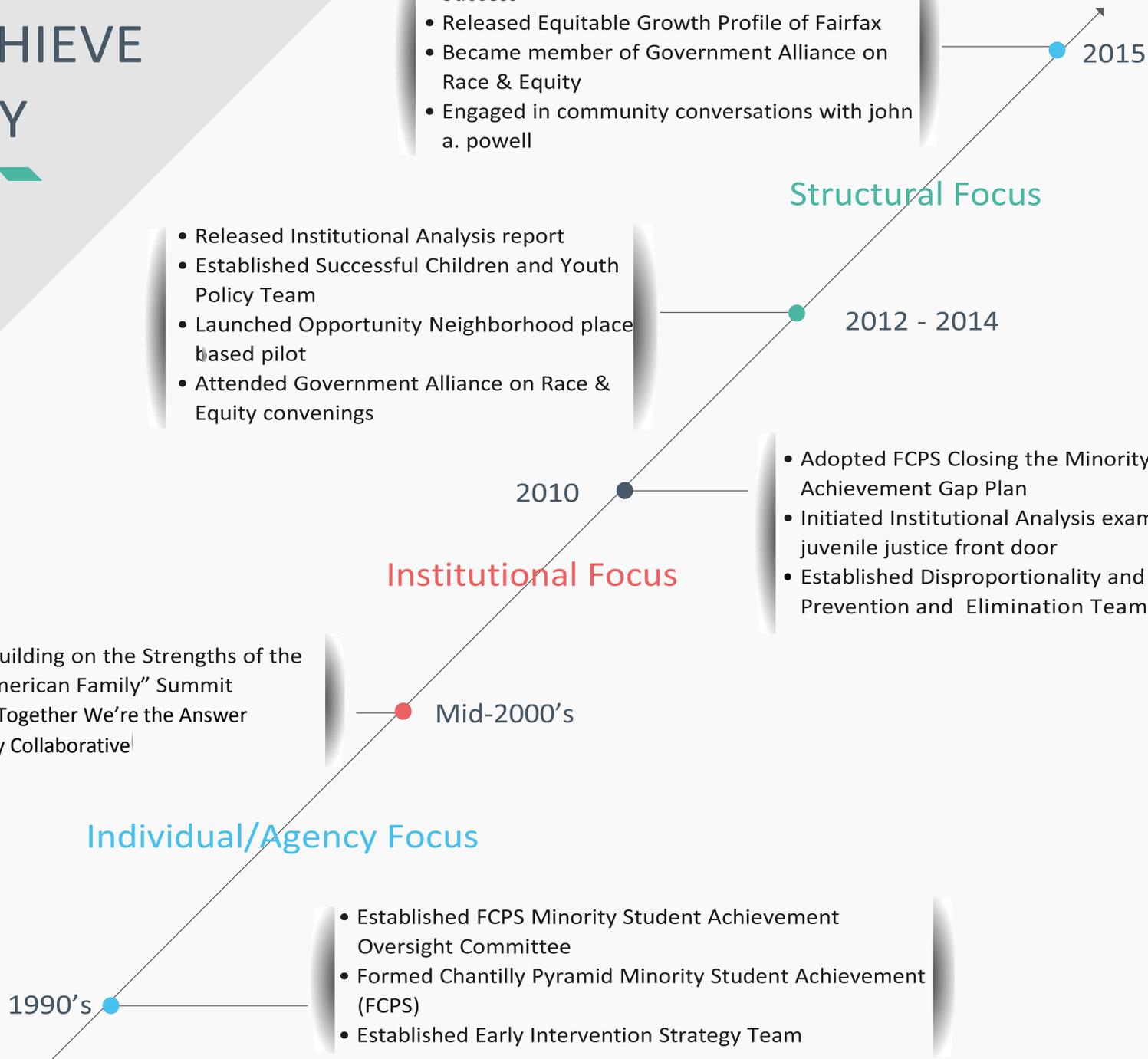
We then listed a number of functions/tasks/areas of concern that a PMO might seek to address. In no particular order, these were: Negotiate CBAs, Parking, Transportation, Housing, Open Space, Community Building, Placemaking, Smart Infrastructure, Economic Development, Advocacy, Sustainability, Revenue Generation, Recreation, Civic Infrastructure, Public Health, Quality of Life, Zoning Input, Revenue Generation, Public Safety.

We agreed that there are two questions we want to ask about each:

- 1) What specifically about each of these functions do we want a PMO to do? (For instance, under “Housing”, a PMO could build housing, manage housing, advocate for housing, etc. Defining exactly what functions we want to see carried out is important.)
- 2) What are the organizational form(s) that seem most appropriate to carry out each of these functions?

Bill Shelton offered to lead a module from his course for NeighborWorks on Best Practices in Community Economic Development called “Commercial District Revitalization”. We agreed that we would like to hear from outside experts on various PMO models, including the Dudley Street Neighborhood Initiative (community land trusts), the Lincoln Institute (various forms), and others.

# MILEPOSTS IN THE FAIRFAX JOURNEY TO ACHIEVE EQUITY



## Institutional Focus

## Structural Focus

## Individual/Agency Focus