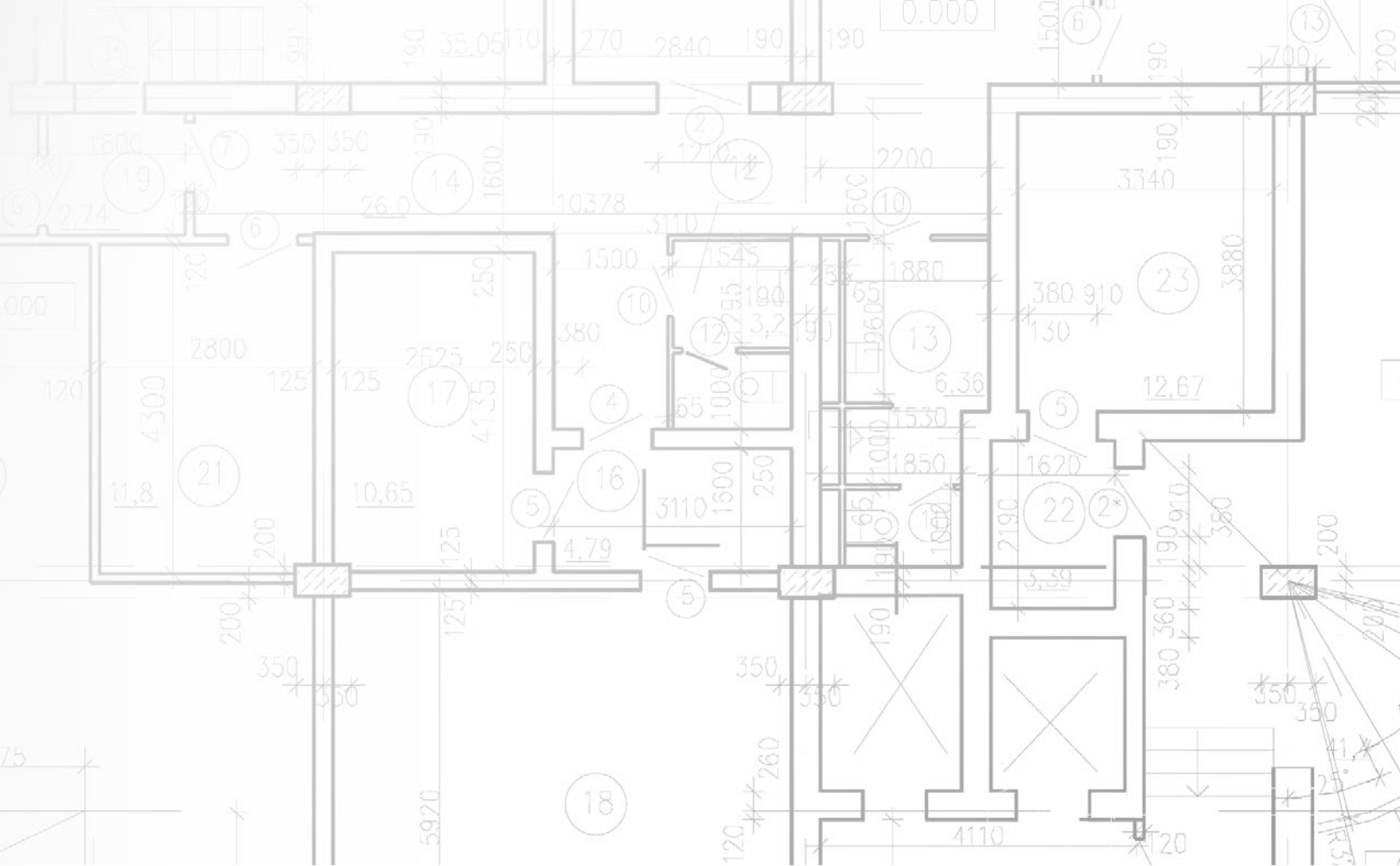


# SOMERVILLE UNION SQUARE

*Strategic and Community Benefits Plan Framework*

JANUARY 2017



## *Acknowledgements*

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## *Executive Summary*

In November 2015, LOCUS kicked off the Attainable Housing and Social Equity Initiative (AHSEI) pilot program with the City of Somerville, Union Square Strategy Leaders (Community Leaders) and members of the general public to develop a clear vision of the economic and social equity benefits needed to maintain the qualities and attributes of Union Square's community, and develop actionable steps in the short, mid- and long term to address them. AHSEI is a place-based method for developing and implementing effective community benefit programs as large-scale development occurs around incoming transit nodes. AHSEI aims to ensure that walkable communities are affordable to the full range of a community's residents and that long time residents are able to live in and enjoy neighborhoods even as they become more walkable and attract more amenities.

The AHSEI process involved several meetings with and without LOCUS to engage all sections of the Union Square community in the group discussions. Based on these discussions, the Community decided that the following were their top community benefit priorities: (1) Economic Development, (2) Affordable Housing, (3) Green and Open Space, (4) Civic Space/Library, (5) Parking and Transportation, (6) Smart City Infrastructure, (7) Finance, and (8) Place Management Organization. Once the priorities were identified, working groups were established to set goals, identify a ranked list of actions, and articulate the appropriate implementation organization and funding sources for each priority. All working groups were open to any member of the public who wished to be involved, and Strategy Leaders were responsible for reaching out to the general public and their constituency to gather feedback throughout this process. While the working groups were asked to meet outside of the LOCUS convening, not all working groups met, and the final updates therefore does not include everyone's views.



In March 2016, LOCUS concluded Phase I with the creation of a “Strategic and Community Benefits Plan,” designed to preserve and enhance what makes Union Square unique. The plan identifies key community priorities and action items to address Union Square’s economic and social equity performance. The plan’s intended use is the formation of discrete public benefit agreements as private development in Union Square moves forward. Union Square Station Associates (US2), the master developer partner chosen by the Somerville Redevelopment Authority in June 2014 for the redevelopment of seven parcels identified in the Union Square Revitalization Plan, is committed to participate in the process.

Phase II included three major deliverables: (1) Finalize the Community Strategic Benefits and Action Plan (2) Establish a Local Entity to support community development and achieve community goals, and (3) Conduct a Social Equity Scan to determine if the existing strategy for Union Square will “move the needle” for equitable development.

This report represents the final version of the Strategic and Community Benefits Plan. The plan provides an in depth understanding of the community’s needs, and serve as a guiding framework to the City, and the development community. The City intends to use this Plan and its prioritization of community benefits and place-based strategies to advise the Somerville Redevelopment Authority (SRA) and the mayor appointed Civic Advisory Committee (CAC) on their pending negotiations with US2, and other developers interested in Union Square.

Overall, the process 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.

## *Union Square Community Benefits Process*

The pilot was shaped by local conditions, local stakeholder participation, and the local neighborhood planning process. It was designed to encourage community fingerprinting and ownership, while facilitating an action-oriented, data-driven conversation to define and prioritize community benefits. It also used regional data from the [WalkUP Wake-Up Call: Boston](#) report that showed how the real estate market, in the Boston Metro, 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. 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 were fully deliberated, clearly formulated and incorporated into project decision-making. From the onset, LOCUS' pilot approach was threefold: inform, invite and communicate.

Inform the general public of the purpose and progress of the LOCUS Attainable Housing and Social Equity Pilot program.

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.

Create a safe space for community members, the general public, affected agencies, and elected officials to communicate their perceptions, opinions and ideas throughout the entire course of the strategic planning process.

All LOCUS meetings were open to the public, with the opportunity for input from anyone interested in participating. Meetings were attended by translators (Spanish, Haitian Creole, and Portuguese), recorded and streamed on Somerville City TV. LOCUS also hosted individual meetings and calls to solicit feedback, and align with the community expectations.

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, Strategy Leaders have started conversations toward the creation of a long-term local entity created and managed by community stakeholders to 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.

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<sup>1</sup> The strategy cards (cards that outline a variety of elements/issues - such as housing, retail, place character, employment, economic development, et al.) developed in the initial stages of the LOCUS process (see Appendix) should also be referenced to gain an in-depth understanding of the community's most pressing needs and service gaps"

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

This section of the report details the final Strategic Planning and Community Benefits Plan completed and approved by the Strategy Leaders. Its purpose and intent is to provide a comprehensive and dynamic understanding of the community's needs<sup>1</sup>, and serve as a guiding framework to the City, and the development community. The plan is not definitive, and will continue to be shaped and updated by various stakeholders as the community evolves.



*The terms set forth below will assist in understanding the forthcoming tables.*

### *Glossary of Table Terms*

Numbers	Represent the ranking of each priority from highest priority starting at one to lowest priority.
Top Priorities	The most critical local needs that must be addressed to improve the community in the most logical and efficient way possible.
Lead	Key organization(s) responsible for planning and executing the Top Priorities.
Plan of Action	Community benefit programs, activates and place-based strategies that addresses the most critical community needs.
Partners	Key community stakeholders who should be involved in the process of executing the Plan of Action.
Duration	The timeframe to achieve the Plan of Action for each Top Priority.
Cost	The monetary value to acquire, produce, accomplish, or maintain the Plan of Action.
Developer Contribution: GLX	City input on how developers can contribute to the Green Line Extension (GLX).
Developer Contribution: Public Infrastructure	City input on how developers can contribute to physical capital investments including roads, water and sewerage systems, electric power, et al.
Developer Contribution: Community Benefits	City input on how developers can contribute cash and/or in-kind to community benefit programs or activities that respond to identified community needs.
(Cash or In-kind) City Zoning and Other Ordinances	City input on what is currently being accomplished through their Zoning, other ordinances, and the ongoing City Policy work, including the Open Space Plan, SomerVision, and other approved City programs, policy documents and plans.

## Strategy Leaders

The list of the Strategy Leaders who participated in the process includes:

**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 McMahan**, 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.

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**Cheri Ruane**, President, Boston Society of Landscape Architects. Union Square resident.

**Jhenny Saint-Surin**, SomerViva Haitian Creole Language Liaison.

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**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





## Strategic Priority 1: Economic Development

**COMMUNITY PRIORITY:** To develop Union Square/ Boynton Yards neighborhood into a significant employment center that supports and sustains diverse businesses in all stages of growth, provides residents and local businesses with opportunities to work and grow, and create new commercial taxes that expand city services.

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

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: GLX	Developer Contribution: Public Infrastructure	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
1	Attract and retain employers	City/PMO	Performs SWOT analysis	Chamber of Commerce, Community City	2-3 months	\$25-30K	-	-	Developer could supplement	-	Economic Development Strategy Plan efforts starting in 2017-2018
			Research precedents		1 month	n/a	-	-	Developer could supplement	-	-
			Establish a neighborhood director of economic development		Ongoing	Avg. salary of a neighborhood director is \$112.7K	-	-	Developer could supplement Mainstreets for marketing assistance (pro bono consultation, money for branding, outreach, wayfinding, placemaking, etc.) Or create a Community Benefits District BID to partner with Mainstreets	-	Currently, USQ Mainstreets
			Develop a tax incentive program for business that provides living wages, benefits and other worker rights.		1-2 years	Approx. \$10.32M in economic development incentives	-	-	-	-	-
			Leverage proximity to Kendall Square and Boston.		Ongoing	n/a	-	-	-	Jobs Linkage in-proposed zoning	-
			Invest in Infrastructure that attracts businesses		Ongoing	\$10-\$50M in infrastructure investments	Developer could supplement	Developer could supplement	Developer could supplement	-	Infrastructure planning work underway
2	Develop and maintain a high quality workforce	City/PMO Local First	Implement high school and community training college training programs	Community College, High School, Federal and State government	1-2 years	There are no formulas to determine the cost of training programs. Guiding principles depend upon the type of program.	-	-	Developer could supplement	-	Existing Workforce Development programs; FabLab & Advanced Manufacturing Training Program
			Pursue partnerships with area businesses and institutions to scale up effort		Ongoing	n/a	-	-	Developer could supplement efforts to create partnerships	-	Various partnerships ongoing
			Build on existing workforce development programs such as the First Source Jobs Program and adjoining employment		Ongoing	n/a	-	-	Developer could supplement	Jobs Linkage in Zoning	Partnering with Partners Healthcare for Healthcare Careers Training Program; MetroNorth Region Employment Board Retail Opportunities Program
			Prioritize at-risk residents for additional training		1 year	n/a	-	-	Developer could supplement	Jobs Linkage in Zoning	Workforce Development
3	Promote economic development of local and independent businesses	City/PMO Local First	Perform a threat assessment to understand greatest risks	Chamber of Commerce, Community College, Main Street Organizations, Minority Business Association(s)	2-4 months	An Economic Development Strategic Plan (EDSP) for a city like Somerville, would cost about \$150,000. It could include a SWOT assessment costing between \$15-\$25K	-	-	Developer could supplement	-	Economic Development Strategy Plan efforts starting in 2017-2018
			Expand and strengthen technical assistance		Ongoing	n/a	-	-	Developer could supplement	-	City Technical Assistance Program
			Provide affordable spaces in the D blocks for selected incubator businesses and key current local serving business being priced out by increased demand		Ongoing	n/a	-	-	Developer could supplement	Implemented in Zoning	-
			Conduct business and market gap analysis		2-4 months	\$50-\$100K to hire a market research agency	-	-	Developer could supplement	-	Economic Development Strategy Plan efforts starting in 2017-2018



## *Strategic Priority 2: Housing*

**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.

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

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
1	Ensure the greatest level of housing preservation and production for extremely low income up to 170% of AMI.	City/PMO	Build staff capacity and financial resources of existing housing trust fund.	Somerville Housing Authority, Existing Housing Trust Fund; Private and non-profit developers	5-6 months	\$206.33/psf (construction only) to approx. \$275/psf total costs. See comments	-	Inclusionary does this to a degree, in the form of fractional payments; linkage fees builds resources rather than staff capacity.	The AHTF is the city's CPA housing arm. Has received 45% of CPA revenues annually.
			Create local policies to maintain affordability for current residents.	Somerville Community Corporation	Ongoing - initial period projected to be 3 years	Averaging approx. \$125,000/unit in subsidy, for permanent affordability	-	-	SNI 100 Homes Initiative: SomerVision Housing Production Goals and affordable unit production targets; SNI - right to purchase/ notification of sale proposal
			Conduct a vulnerable populations audit to measure impacts of Union Square re-development.	Somerville Housing Authority, Existing Housing Trust Fund; Private and non profit developers	5-6 months	n/a	Developer could supplement	Housing Needs Assessment required under the Industry Zoning Ordinance	Existing staff resources could assist with vulnerability assessment
			Obtain subsidy and loans from Union Square DIF.	Somerville Housing Authority, Existing Housing Trust Fund; Private and non profit developers	5-6 months	Leverage public and private funds	-	-	Included a 'soft' recommendation in SNWG recommendations
2	Provide a good mix of housing that is attainable and will accommodate families' and senior needs.	Existing Community Organizations/ City	Obtain from US2 survey results of amenities needed for family housing	City; PMO; Trust Fund (SHT); State	TBD	\$160-\$218.00/psf for high-level independent senior housing construction costs. See comment	Developer to provide	-	SNWG recommended density bonuses for developers who create more family-sized units
			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		Ongoing	n/a	Participation in Land Trust	Impact analysis of such a measure being commissioned now, for completion ASAP.	Transfer fee policy - Major SNWG recommendation
			Develop housing resources and assistance from local universities and colleges		1 year	n/a	-	-	University housing referenced in SNWG report, though not as part of a specific recommendation
			Focus efforts and resources on acquiring and rehabilitating existing housing stock.		Ongoing	n/a	Developer contribution could supplement efforts	Linkage pays for housing development, rather than acquisition of existing stock; Lead paint abatement and Rehab programs also support overall goal	CPA eligible & SNI 100 Homes Initiative
			Provide up-zoning and density bonuses to developers in exchange for affordable housing.		1 year	n/a	-	Proposed zoning provides bonus	SNWG recommended increasing housing production goals, which would require increased density, and also recommended offering density bonuses to developers for more affordable housing
			Leverage State's 40R program		Ongoing	n/a	-	-	Exploration of it included as a SNWG recommendation
3	Promote home ownership and rental housing opportunities	Existing Community Organization	Establish a Housing loan incentive program financed with public and private support based on the transfer fee	City; PMO; Housing Trust Fund	1-2 years	n/a	-	-	Transfer fee under consideration
4	Ensure property management functions are kept in the hands of local stakeholders	Existing Community Organization	TBD	PMO, City	Ongoing	n/a	Developer pledge of local management	-	-
5	Streamline and ensure accountability of tenant and homebuyer marketing and selection policies and procedures for attainable housing options	Existing Community Organization	TBD	City, Participating Employers	1 year	n/a	-	-	City reviewing process for affordable housing waitlists; HUD's Affirmatively Furthering Fair Housing Rule has substantially complicated 'streamlining' efforts.
6	Gain long-term community control of percentage of land to be redeveloped for family housing development	City/Land Trust	Establish a Land Trust and other leveraged resources	Foundations	1-2 years	The median operating budget of Community Land Trust is \$102.5K	Developer contribution could easily fund feasibility study and startup costs	-	City reviewing land trust programs
			Identify other tools and incentives to promote family friendly housing development	Foundations, Employers	1 year	n/a	Developer contribution could support these efforts	-	Existing OSPCD staff resources could assist





## Strategic Priority 3: Green and Open Space

**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.

Note: Each priority is ranked from highest priority (1) to lowest priority (4).

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: Public Infrastructure	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
1	Maintain a higher percentage of open space in Union Square (30-34%)	City/PMO / Developer	Create an acquisition fund for open space	Urban Agriculture Ambassador program, Urban Park Ambassadors, Undergraduate Research Opportunity Program, High school/ District court community service	1 year	Approx. \$6-\$10 M per acre for park development	Contribution may fund green space/streetscape enhancement	Developer contribution could fund open space acquisition	Zoning will require 15% minimum civic space, 20% including sidewalks, etc.	CPC has recommended \$750,000 to establish an open space land acquisition fund; currently researching options for structuring fund that will allow for multiple funding sources. Awaiting BOA approval (City-wide) 2016
			Establish a Land Trust to acquire open space and provide stewardship	Urban Agriculture Ambassador program, Urban Park Ambassadors, Undergraduate Research Opportunity Program, High school/ District court community service	Ongoing	The median operating budget of Community Land Trust is \$102.5 K	-	Developer contribution could fund feasibility study and startup costs	-	City to review land trust programs; City has information on documents on land trusts specific to open space fund
			Use transfer fee monies to acquire open space	Urban Agriculture Ambassador program, Urban Park Ambassadors, Undergraduate Research Opportunity Program, High school/ District court community service	Ongoing	n/a	-	-	-	-
			Establish a Parks and Recreation Department	Urban Agriculture Ambassador program, Urban Park Ambassadors, Undergraduate Research Opportunity Program, High school/ District court community service	Ongoing	-	-	-	-	2016 - Has been done, mainly focused on recreation and recreational; do not build but maintain and recreational programming
2	Assess the needed acreage for recreation	City/PMO	Work with the City to understand open space planning.	School system, particularly the High School	4-7 months	n/a	-	-	-	Open Space Plan & Recreation Plan 2016; OSPCD is happy to offer additional engagement as appropriate.
			Assist the City in developing a plan to provide recreational space	School system, particularly the High School	Ongoing	n/a	-	-	-	2016 Fields Master Plan
3	Promote better surface management and green infrastructure	City/PMO	Develop design standards and quantified goals.	Natural Resources Defense Council, EPA (Green Infrastructure)	1-2 years	\$40-50K	-	Developer contribution could contribute	-	Design Standards - Open Space Plan; Zoning to have green overlay to cover infrastructure; Various City agencies are constantly working to refine/update
			Integrated storm water management improvements into street improvements	TBD	TBD	n/a	Developer contributions could support	-	-	Engineering Department does integrate into street improvements; we have storm water integration into parks (in parks currently with varying levels of stormwater storage); Citywide mobility plan has been proposed to help structure community dialogue and interagency technical review of existing strategies and preparation of new project standards
4	Create design standards and guidelines for open space and public realm	City/PMO	Develop design standards and proportions for a variety of open space including green roofs, shared streets.		1-2 years	Approx. \$85-100 K to hire a planning and design firm with ASLA credentials as well as green infrastructure	-	-	Existing and proposed zoning implements this	-



## Strategic Priority 4: Civic Space

**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.

**Note:** Each priority is ranked from highest priority (1) to lowest priority (4).

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: GLX	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
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	Develop a program of activities, services, space needs, and potential sites.	Stage Source, MBTA, US2, Don Law	6 months	22,000 sf at \$167-\$292 per sf	-	Could be integrated into development or provide cash contribution	-	-
2	Community kitchen and café that serves as an incubator for food startups (places of connection)	City/PMO	Develop a program of activities, services, space needs, and potential sites.	Union Kitchen, US2	6 months	Initial investment for construction and 1st year operation of an Incubator Kitchen is \$740 K	-	Could be integrated into development or provide cash contribution	Proposed zoning requires art/maker space set aside	-
2	A branch library with small focused collections of books, DVDs, CDs, etc.	City	Develop a "use transfer fee," through a Land Trust, to attract investments in community assets; use transfer monies to acquire open space.	Library	2 years	Construction cost of approx. \$170 - \$195/psf. Cost will depend heavily on programming	-	Could be integrated into development or provide cash contribution	-	-
2	Recreational center, containing a basketball court, locker room, and space for yoga and other classes	City	Develop a "use transfer fee," through a Land Trust, to attract investments in community assets; use transfer monies to acquire open space.	YMCA, City Dept. of Recreation	2 years	Construction cost of approx. \$170 - \$195/psf. Cost will depend heavily on programming	-	Could be integrated into development or provide cash contribution	-	-
2	Small business incubator which includes job/career training center	City	Develop a "use transfer fee," through a Land Trust, to attract investments in community assets; use transfer monies to acquire open space.	Artisans Asylum, Somerville High School Vocational Program, Steam Academy, Welcome Project, Canopy, Foundations, Teen Empowerment, Local universities, Greentown Labs	2 years	Construction cost of approx. \$161.76/psf	-	Could be integrated into development or provide cash contribution	Zoning requires art/maker space component; zoning also creates opportunities for funds to support job linkage	-
2	Health clinic providing affordable treatment options for residents	City	Develop a "use transfer fee," through a Land Trust, to attract investments in community assets; use transfer monies to acquire open space.	Cambridge Health Alliance	2 years	Project cost between. \$400 - \$450/psf	-	-	-	-
3	Affordable daycare center	City/PMO/Developer	Develop a program of activities, services, space needs, and potential sites.	SomerPromise	3 months	Construction cost of approx. \$100 - \$110.00 psf	-	Could be integrated into development or provide cash contribution	-	-
4	Dedicated teen space with programs targeting that age group	Community Organization/City	Develop a program of activities, services, space needs, and potential sites.	Arts Council on Aging, Boys and Girls Clubs, YMCA, Early Head Start/CAAS, Teen Empowerment	6 mos.	Construction cost of approx. \$100 - \$110.00 psf	-	Could be integrated into development or provide cash contribution	-	-
5	A Welcome Center in connection with the GLX station	City	Develop a program of activities, services, space needs, and potential sites.	MBTA, US2, Don Law, Welcome Center	1 year	n/a	Contribution could supplement efforts	Could be integrated into development or provide cash contribution	-	-
6	A new location for the SCATV offices and studio	City	Develop a program of activities, services, space needs, and potential sites.	SCATV	2 years	Construction cost for retail space is approx. \$50 - \$80/psf	-	-	-	-
7	Shared retail space with shared amenities	Community Organization	Develop a program of activities, services, space needs, and potential sites.	US2, Chamber of Commerce	2 years	Construction cost of approx. \$225 - \$275/psf	-	-	-	-



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# Faces of UNION SQUARE

NATALIE KOVALCIK  
"TRY THE BLUEBERRY JAM  
DONUT!"



## Strategic Priority 5: Parking, Transportation, and Mobility

**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.

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

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: GLX	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
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	Developer	1-4 months	n/a	-	-	-	This is underway; goal is to direct developer contributions to net down City share of \$50 million commitment; CPA funds could be used for Path extension; can pay for regional projects so could potentially attract funding from neighboring CPA communities
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)	Ensure the agency sets pricing following a demand-based scheme that minimizes drive alone (SOV) auto trips and maximizes revenue.	City	1 year	Approx. \$150-200 K. Annual budgets for TMA operation will depend on scale and services.	-	Developer contribution could supplement research	Zoning - Mobility Plan	New development will be required to meet Mobility Management section of Zoning Overhaul
		Community Organization (TMA)	80% Of district parking should be owned by this entity, and 100% managed.		Ongoing		-	-	-	City's preference is likely to be an integrated management framework rather than duplicative, balkanized system
		Community Organization (TMA)	Decrease in SOV trips, and increase bicycle, walking, and transit trips.		Ongoing		-	-	-	Agree; See above
		Community Organization (TMA)	Decrease in air pollution and vehicle traffic congestion		Ongoing		-	-	-	Agree; See above
		Community Organization (TMA)	Consider using District Improvement Financing (DIF)/Tax Increment Financing (TIF), or through the CBA, or through a PTDM regulation		1-2 years		-	-	-	-
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	Consider a flexible building structure to facilitate future need for fewer cars, and parking.	ParkSomerville	1-2 years	Approx. \$50-\$70 psf	-	-	-	-
		Community Organization/ City	Consider sharing incentives with developers.		Ongoing	n/a	-	-	-	-
		Community Organization/ City	Operations paid for by a base level of developer CBA funds (short term), and replaced with parking revenue (long-term)		Ongoing	n/a	-	-	-	-
		Community Organization/ City	Parking demand is managed through pricing with discounts for low-income drivers.		Ongoing	n/a	-	-	Zoning has sophisticated requirements for data collection, sharing, and implementation	-
4	Ensure all developers do a comprehensive traffic and parking study and create a Parking and Transportation Demand Management Plan	City	Developers	Redevelopment Authority, ParkSomerville	Ongoing	Cost is specific to each and every project's developer/team including PPP	-	-	Zoning has sophisticated requirements for data collection, sharing, and implementation	-
5	Maximize the use of new technology to increase efficiency of parking	Community Organization	CBA	Redevelopment Authority, ParkSomerville	Ongoing	-	-	-	-	Autonomous vehicles research & development project is examining this dynamic
6	Increase in transit capacity in Union Square (better bus circulation, extension of the Green Line)	City	TBD	MBTA	Ongoing	n/a	Contribution could supplement efforts	-	-	Citywide mobility plan scope includes this type of analysis and strategic planning; infrastructure design will prioritize bus operations
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	Ongoing	n/a	-	-	-	OSPCD is working with Police Dept and other agencies to analyze and publish drivers multi-modal safety data; launch community dialogue; and structure policy interventions



	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: Public Infrastructure	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
8	Electric Vehicle Charging Stations	City, PMO, TMA	CBA	Developers, ParkSomerville	TBD	\$300-\$2.8 K to operate a station	-	-	-	-
9	Hubway Stations	City	CBA, Regulations, Developers separate from CBA?	Developers, ParkSomerville, Employers	TBD	\$41-\$49 K to install a station, \$1000 cost per bike, and \$1860 in annual operating cost per bike.	-	-	Part of zoning requires TMA strategy	OSPCD targets bike-share expansion of 25 new stations over 10 years; this planning is another element of the funding request for a Citywide Mobility Plan
10	Separated Bicycle Facilities (cycle tracks)	City	CBA, Regulations, Developers separate from CBA?	Bicycle Advocate Groups, Somerville Bicycle Committee	Ongoing	\$500 K to construct a bike station, and \$50,000 to operate annually	Developer could provide as part of development	-	-	Underway; Somerville Avenue buffered lane is a first for Somerville; buffered lanes to be added to Prospect + Webster in 2017; protected lane will be installed on Washington Street East of McGrath in 2017; neighborhood plan calls for protected facilities on numerous USQ routes; this planning is another element of the funding request for a Citywide Mobility Plan
11	Sufficient Bicycle Parking	City	TBD	Bicycle Advocate Groups, Somerville Bicycle Committee	Ongoing	n/a	-	-	Required in zoning	City has existing request program for ring-racks; GLX station is required to provide ~100 rack spaces
12	Commuter Shuttle to connect Union Square to Kendall, Assembly	TMA	CBA	Employers	1-2 years	A Vanpool is estimated to cost \$6K	-	-	Part of zoning required TMA strategy	City is pushing for this on numerous fronts; zoning mobility Management requirements; regional planning with MassDOT/MPO/MAPC
13	Build the Grand Junction connection with Cambridge	City, PMO, TMA	CBA	TBD	TBD	\$9 K to construct	X	-	-	X
14	Research study on new technologies and transportation (Uber/Lyft, mobile technologies, hubway, bike, walk, apps, autonomous vehicles, etc.)	Community Organization/ City	Parking demand is managed through pricing with discounts for low-income drivers.	USDOT Smart City Initiative	1 years	Approx. 25-50 K	-	Developer Contribution	-	X
15	Transit Priority at traffic lights (and other technology to give preference to transit)	City	Developers	Redevelopment Authority, ParkSomerville	Ongoing	n/a	-	-	-	City has contracted to replace four signal sets in Union with adaptive technologies that will facilitate TPS; these will be operational in 2017 but TPS depends on MBTA expanding its TPS piloting
16	Review of street design (to prioritize non-SOV accommodations) before approval for development	Community Organization	CBA	Redevelopment Authority, ParkSomerville	Ongoing	n/a	-	-	Part of zoning overhaul, new street design and acceptance	-
17	Flyover bridge next to Prospect Street to decrease interactions between people who bike/walk and auto vehicles	City	TBD	MBTA	5-8 months	n/a	Developer contribution could support this effort	-	-	Currently installing buffered bike facilities on bridge, to be completed summer 2017
18	Change from minimum to maximum parking requirements	City	TBD		1 year	n/a	-	-	Included in zoning	-



## *Strategic Priority 6: Smart City Infrastructure*

**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.

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



	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: Public Infrastructure	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
1	Establish a City Point of Contact(s) for Smart City infrastructure planning	City	n/a	n/a	3 months	n/a	-	-	-	Can be accommodated when OSPCD, Engineering, IT are fully staffed up
1	Establish working group beyond what we have now with representation by City, community, US2, experts	Community Organization/ City/ Developer	n/a	Implicit	3 months	n/a	Developer participation (non-financial)	-	-	City willing to participate
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 months	n/a	-	-	-	City Capital Plan, 5-year street resurfacing plan are aimed at this outcome
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 year	\$15 M estimated cost for implementation	Developer in-kind or cash contribution could support this effort	-	-	Fiber conduit is included in Somerville Avenue sewer separation design
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 months	n/a	-	Developer contribution could supplement this effort	-	City willing to participate
2	Draft design/implementation plan that identifies existing and new assets and sequence, time frame required	TBD	RE transfer, DIF, TIF, or other available	TBD	6 months to 1 year	Approx. \$45-65K	-	-	-	City willing to participate
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 months to 1 year	n/a	-	Developer contribution could supplement this effort	-	City willing to participate
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 months to 1 year	Approx. \$35-55K	-	Developer contribution could supplement this effort	-	City willing to participate
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 year	n/a	-	-	-	City willing to participate
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+ years	n/a	-	-	-	City willing to participate
3	Crowd source smart city community manifesto that correlates to SomeVision, Neighborhood Plan, Locus strategies, etc.	Community Organization	Some administrative and staff support or involvement by City	Community / public	6 months to 1 year	Every project has a custom quote based on the desired outputs and workflow.	-	-	-	City willing to participate
3	Identify and establish institutional and private partners	Community Organization	n/a	TBD	6 months to 1 year	n/a	-	-	-	City willing to participate
3	Create links with 311, Resistant to ensure interoperability, shape design	Community Organization/ City	n/a	Mayor and Department heads	3-6 months	n/a	-	-	-	City willing to participate



## Strategic Priority 7: Climate Change/Sustainability

**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.

Note: Each priority is ranked from highest priority (1) to lowest priority (8).

	Top Priorities	Lead	Plan of Action	Partners	Duration	Cost	Developer Contribution: Community Benefits (Cash or In-kind)	City Zoning and Other Ordinances	Ongoing City Policy Work
1	Community Shared Solar facility	City	TBD	City, Commonwealth	1-2 years	\$200,000/ \$8.77 per watt	Developer contribution could supplement this effort	.	Community Shared Solar feasibility assessment has been conducted: no existing ideal sites.
2	Energy Options Analysis (research and implementation)	City	TBD	City, Commonwealth	Now	\$100 K	Developer contribution could supplement this effort	Will be conducted at high level in Climate Action Plan.	.
3	Electric Vehicle Charging Stations	City	TBD	City	1-2 years	\$300 for a public level 2 station	Developer contribution could supplement this effort	Zoning could require	Feasible public sites have been identified. One station installed in Union Sq in 2015.
4	Hubway Stations	City	TBD	City, Property Mgmt Companies, Training Company	Ongoing	\$41,950 for a six dock station	.	Zoning as part of TMA requirement	.
5	Fund to offset maintenance training for property management companies and City staff (to handle new kinds of infrastructure)	PMO	TBD	City	Ongoing	TBD	Developer contribution could supplement this effort	.	.
6	Revolving Loan Fund to fund these kind of infrastructure	PMO	TBD	City	Ongoing	n/a	Developer contribution could supplement this effort	.	.
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	n/a	Developer contribution could supplement this effort	.	.
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	n/a	Developer contribution could supplement this effort	.	Planned for new buildings, e.g., High School





## Strategic Priority 8: Establish a Local Entity and Long-term Body

**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.

Note: Each priority is ranked from highest priority (1) to lowest priority (7).

	Top Priorities	Lead	Duration	Outcomes and Next Steps
1	Establish and report on preliminary preferences for PMO responsibilities in order to focus research and dialog	Working Group	Completed	Early in Phase I, there was general consensus that a community should organize a place-based organization (PMO) to manage the implementation of the Strategic Plan. Recognizing additional work was required, the Strategy Leaders created a working group to develop recommendations for the PMO structure, role and responsibilities to be presented to the full body Strategy Leaders.
1	Establish clear interim strategy for community role in CBA prior to establishment of PMO[1]	Strategy Leaders	Completed	
2	Review and select preferred model(s) to achieve ideal PMO responsibilities	Working Group	Completed	LOCUS brought in expert Marco Li Mandri (an expert on community benefit districts and neighborhood revitalization) 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.
3	Design the governance organization and strategy for establishing legal standing	Working Group	Ongoing	LOCUS facilitated meetings 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.
4	Determine how to manage conflicts of interest and ensure representation and credibility in short/long-term	Working Group	Ongoing	The PMO working group has expanded to include representatives of more Union Square stakeholder groups. It's now called the Neighborhood Council working group, and is currently working to establish a long-term local entity to support community development and coordinate efforts as defined by the Union Square's Strategic Planning and Community Benefits.
5	Determine the scope of daily place management operations	Working Group	Ongoing	
6	Determine funding sources for daily place management operations	Working Group	Ongoing	
7	Take necessary steps to ensure legal standing or authority, including influencing CBD legislation to our benefit	Working Group	Ongoing	



**MEMBERS OF THE PMO WORKING GROUP ARE CURRENTLY WORKING WITH A VARIETY OF NEIGHBORHOOD GROUPS TO ESTABLISH A COORDINATING BODY TO:**

Ensure that benefits of development accrue to the community, residents and business.

Provide neighborhood oversight and participation in developer, city, and state efforts that impact Union Square.

Ensure that development delivers benefits to Union Square in accordance with prior work performed by LOCUS Strategy Leaders, the CAC and Union United.

Constitute a transparent, deliberative body that represents the neighborhood through self-selection and democratic election by all engaged stakeholders.

Be a Massachusetts not-for-profit corporation with 501(c)(3) status and legal standing to act as a signatory to official contracts with the City, developers, and/or the SRA, and

Reserve the right and intent to define additional scope for itself in the future.

The group has made significant headway in crafting a proposal for an independent and democratic Neighborhood Council responsible for managing the issues raised throughout the LOCUS process. The group has held several neighborhood meetings to gain community buy-in for the proposal. The intent is to have a final proposal and approval in 2017.

## *Accomplishments and Outcomes*

The City of Somerville, Union Square Strategy Leaders, and members of the general public accomplished a significant amount of work over the course of the LOCUS process. The pilot established a shared understanding and 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.

### **HIGHLIGHTS OF THE AHSEI ACCOMPLISHMENTS AND OUTCOMES**

#### **COMMUNITY ENGAGEMENT**

The Union Square community was directly engaged as full participants in Somerville's planning and development process. The process was open to any public member who wished to be involved. Meetings were live streamed on City TV, the government access TV channel for Somerville, MA, and co-hosted by the City's [Somerviva](#) Immigrant Outreach and Services program, in four languages to gather feedback from the Spanish, Haitian Creole, Portuguese and English speaking members of the community.

#### **COMMUNITY FINGERPRINTING AND OWNERSHIP**

The Strategy Leaders and working groups cooperatively identified key community priorities and action items to address Union Square's economic and social equity performance. This approach ensured everyone's contributions were noted and reported back. Each working group had 10-20 participants, which included Strategy Leaders and members of the general public.

#### **IMPLEMENTATION STRATEGY**

Creation of a "Strategic and Community Benefits Plan" designed to preserve and enhance what makes Union Square unique.

#### **PLACE MANAGEMENT**

Strategy Leaders and members of the public are currently working to establish a Neighborhood Council to support community development and achieve community goals.



## *Next Steps*

### **CONDUCT A SOCIAL EQUITY AND SUSTAINABILITY SCAN**

LOCUS has also partnered with George Washington University to conduct a quantitative analysis using the social equity performance metrics from the Metro Boston WalkUP Wake Up Call to determine if the Strategic Community Benefits Plan for Union Square will “move the needle” for equitable development. Specifically, the report creates a social equity score for the Union Square area of Somerville, MA, and makes projections of what that score would be under different policy scenarios in the future. The policy scenarios will be based on a set of values and loosely defined strategies for achieving those values, as developed through a lengthy community visioning process. The purpose of the work in question is to determine to what extent these strategies, if they are implemented, will result in improved social equity of Union Square (based on the social equity metric). The initial was finalized and delivered to the City in January 2017.

### **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. LOCUS will continue to provide support and technical assistance to the Neighborhood Council or the City.

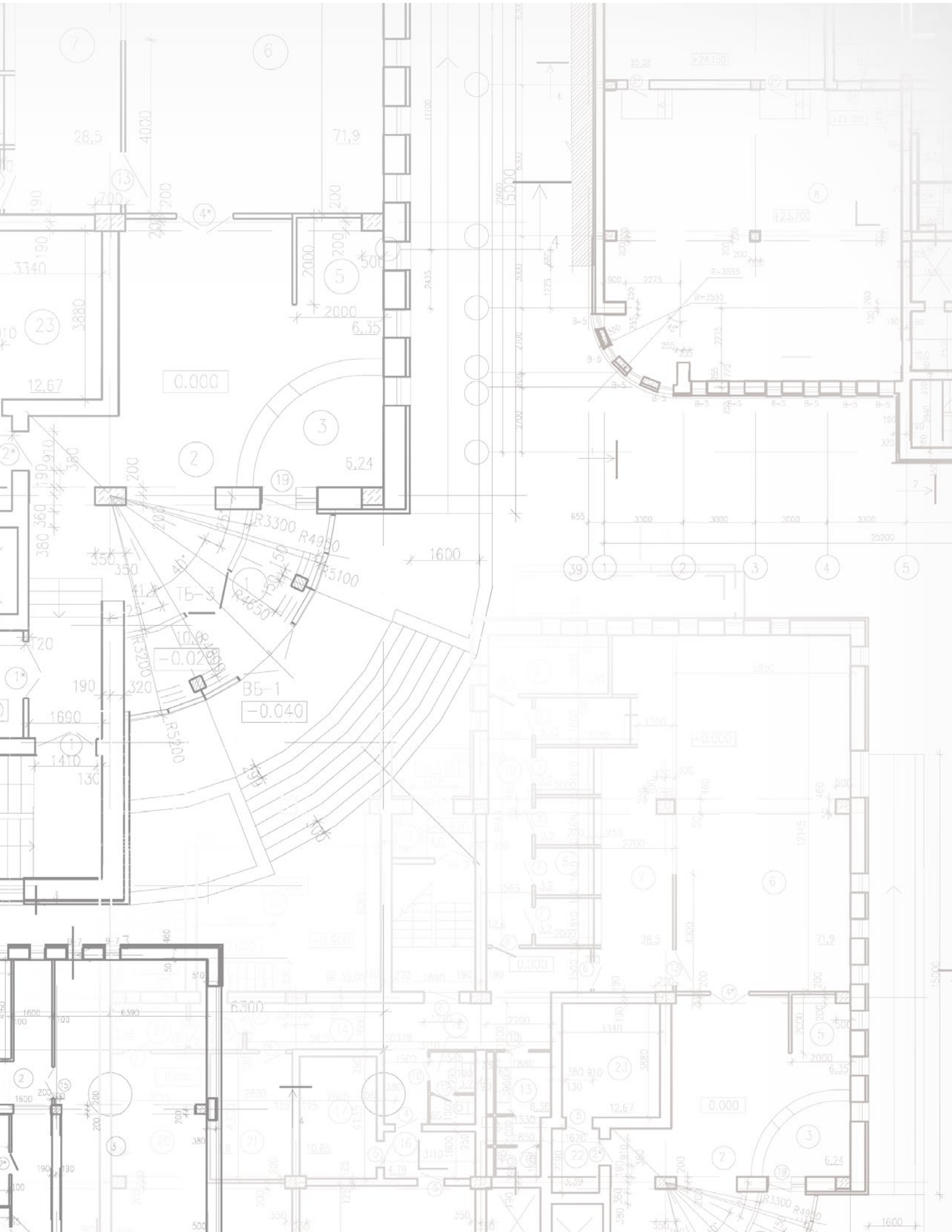


## *Appendix*

To view the Appendix,  
visit the CAC's website:

<http://www.unionsquarefutures.org/Documents>

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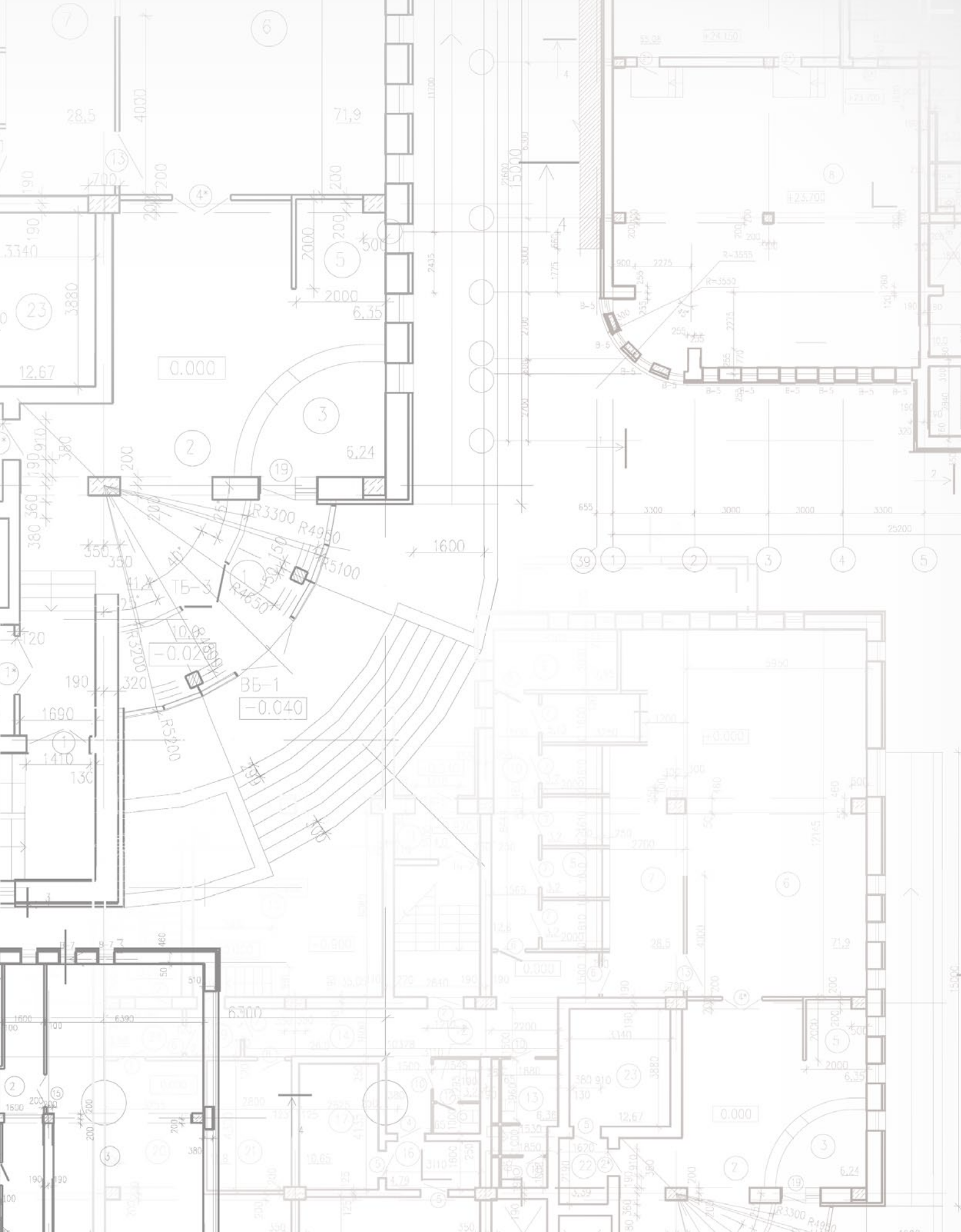
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