

SOMERVILLE UNION SQUARE BRIEFING BOOK

NOVEMBER 2015



LOCUS



Smart Growth America
Making Neighborhoods Great Together

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EXECUTIVE SUMMARY

Union Square is poised for significant investment and transformation. The City of Somerville has made great strides towards the redevelopment of Union Square by securing a Full Funding Agreement signed by the Federal Transit Administration (FTA) in January 2015 for the MBTA Green Line extension to College Avenue in Medford and a spur to Union Square. The Green Line extension is now under construction and the first phase of stations including Union Square is expected to open in the next 2-3 years. The remediation of the Kiley Barrel site is substantially complete and a Master Developer (US2) for Union Square has been selected.

The City of Somerville has been recognized nationally for its forward-thinking and bold efforts to empower its residents and ensure that the City is an “exceptional place to live, work, play and raise a family.” The City is furthering this tradition by using an inclusive, public process to develop an innovative new model for public benefit agreements that address social equity through affordable housing and jobs, open space, infrastructure, sustainability and more. The momentum towards new development has led many to fear that new growth in Union Square and across Somerville will lead to displacement of the residents and businesses that make Union Square the unique, and vibrant location it is today.

The City of Somerville approached LOCUS to select Union Square as the first location for the Attainable Housing and Social Equity Initiative (AHSEI) Pilot in metropolitan Boston. The AHSEI Pilot seeks to develop new sustainable strategies that balance the market demand for great walkable urban places and communities, with the need for housing and transportation that are attainable and equitable to all Americans. AHSEI is a program that was launched in 2014 by LOCUS: Responsible Real Estate Developers and Investors, the national coalition of real estate developers and investors who advocate for sustainable, equitable, walkable development in America’s metropolitan areas. LOCUS 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’ work in Union Square will be done in collaboration with the Center for Real Estate and Urban Analysis at the George Washington University (GWU). LOCUS and GWU’s work in Union Square on the Attainable Housing and Social Equity Initiative Pilot is generously supported by a grant from the Barr Foundation.

LOCUS previously worked in the Boston region while completing research for the [Metro Boston WalkUP Wake-Up Call report](#) released in early 2015. The WalkUP Wake-Up call report looked at the entire 3,119 square miles in the metropolitan Boston region and ranks the performance for all land based on two criteria: economics and social equity. The report found that the Boston market is showing substantial and growing pent-up demand for walkable urbanism, demonstrated by significant and increasing real estate premiums on average for walkable urban real estate over drivable suburban real estate. While Union Square was not ranked in the original report, a review was conducted by LOCUS and GWU to determine how Union Square would have ranked if it had been included. Results show that Union Square would have received a silver ranking for social equity, which is a combination of metrics for both affordability and accessibility/opportunity. On the

affordability measure, which takes account of average housing and transportation costs, as well as the percentage of lower income households with severe housing cost burdens, Union Square is currently very near the average relative to the rest of the WalkUPs in the region. With respect to accessibility/opportunity, Union Square ranks somewhat lower. This is mainly a function of the lack of rail transit, which limits its accessibility, and a lack of major employment. On the economic ranking, Union Square would likely have achieved a silver ranking based on a combination of rents for both residential and commercial property however scores a bit lower if only commercial rents are taken in to account.

As part of the Attainable Housing and Social Equity Initiative Pilot, LOCUS will facilitate a discussion with the Union Square Civic Advisory Committee (CAC) with input from local community groups, residents, businesses, and stakeholders in Union Square, including Union Square Neighbors, Union United, Union Square Main Streets, Union Square Station Associates (US2) and others to begin the development of an implementation plan for achieving Union Square's future economic development and social equity goals. Two key outputs of the implementation plan work are the public benefits agreement and the identification of a place management organization, either existing or to be created.

This briefing book has been put together to summarize the extensive research, planning, and visioning work that has taken place over several years during the process of planning for Union Square's redevelopment. LOCUS' goal is to build upon and not duplicate work that has been done to date and to help all participants in the Attainable Housing and Social Equity Initiative Pilot begin with a basic understanding of the issues that will be considered during the strategy process. The assumption is that well-informed participants are required to develop a strategy for Union Square.

Please note: *This briefing book is not designed to be an original document. It reflects the work of many other groups and individuals and in many cases is an abbreviated version of the full text in the original documents or websites. More information and the full text of documents can be found by visiting the links associated with each section.*

UNION SQUARE OVERVIEW

HISTORY



Union Square is the city's oldest and largest commercial district. The area was originally referred to as Milk Row because of the small family farms that supplied milk and produce to Boston. In 1835, a passenger railroad station opened near Union Square. The first horse-drawn streetcar system in the Boston area was established in 1852 between Union Square and Harvard Square. The development of row houses and apartment hotels along the streetcar line made Union Square an attractive area for Boston commuters to live. In the early 1900's, electric streetcars made 88 stops a day in Union Square to bring Somerville commuters to their jobs in Boston, and to bring Boston and Cambridge commuters to the burgeoning industries in Union Square, including grist mills, and ink, glass, and copper tubing factories. The nineteenth century saw the establishment of brickyards, slaughterhouses, and the Union Glass Company.

Union Square served as the primary commercial center of Somerville. While this period is retained in some of the square's taller historic buildings, today the area is known for its niche retail and varied selection of ethnic restaurants and markets. The square is also home to a number of key public buildings including the City's Public Safety building and the US Post Office.

The mid-20th century brought with it changes in transportation modes. In particular, the widespread use of the automobile gave consumers greater mobility. As was true for many historic commercial areas throughout the country, Union Square began to experience the negative effects of a new preference for living and shopping in the suburbs. At the same time, the Northeast began to lose ground as the country's manufacturing center. To exacerbate matters in Union Square, the Commonwealth adopted a new transportation model, replacing streetcars with highways to serve communities north of the Charles River. Union Square was first by-passed by McGrath Highway and subsequently Interstate I-93. Although rail service does traverse Somerville (the Lowell and

Fitchburg Commuter Rail Lines), it too was intended to serve suburbs beyond the City, as the routes were designed without stops in Somerville.

After the light rail system servicing Union Square was removed, the local economy collapsed. Union Square lost density and urban character as property owners with vacant commercial spaces removed the top stories of their buildings to lower their commercial property tax. When the Ford Motor Assembly Plant in Assembly Square closed in 1958, portions of its workforce turned to nearby Union Square to open automotive niche businesses, including salvage and auto repair and resale. Disconnected from Boston and Cambridge, Union Square was left to degrade throughout the remainder of the century.

References:

City of Somerville. (2012, Apr.). Somervision: Comp Plan 2010-2030. Retrieved from City of Somerville: <http://www.somervillema.gov/spotlights/comp-plan>

UNION SQUARE TODAY



The Union Square neighborhood is located just two miles north of downtown Boston and one mile from Kendall Square. Within a two-mile radius, there are dozens 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 regional assets.

There are an estimated 57,679 people who live within one mile of Union Square, which includes Somerville, Boston and Cambridge—a number expected to increase as new development projects move forward and add to local density. While the average household income is \$81,785 within this radius—almost \$16,000 more than Massachusetts’ median household income—more than 20% of Union Square residents fall below the poverty line. Though Boston’s regional economy has thriving

education, healthcare and technology sectors, Somerville’s jobs are overwhelmingly retail and service oriented with low-wages and few benefits. Increasing access to affordable transportation, job opportunities and a more varied housing stock will prove especially beneficial for the low-income families in Union Square.

	Eastern Somerville (1)	City of Somerville	Massachusetts	U.S.
Population	12,503	77,739	6,648,138	313,861,723
Unemployment	5.3%	6.4%	8.5%	9.3%
Poverty Rate	21.6%	16.6%	11.8%	15.9%
Percent Minority	30.3%	21.2%	17.6%	23.7%
Median Household Income	\$58,712	\$65,110	\$66,135	\$52,176
% Homeowners	29.6%	34.9%	62.0%	64.0%
% Foreign Born	32.4%	23.8%	15.2%	13.0%
All data based upon 2013 American Community Survey, unless otherwise noted.				
(1) Data collection from Census tracts 351204,350104,350103,351403,351404,351203.				

Eastern Somerville—of which Union Square is a part—suffers from disproportionately high rates of unemployment and poverty. These realities have earned Union Square a Neighborhood Revitalization Strategy Area (NRSA) designation by the U.S. Department of Housing and Urban Development (HUD), allowing the City to direct valuable resources into the redevelopment of this area.

After more than three decades of study and neighborhood planning, Union Square is now on the verge of transformation. A new \$40 million MBTA Green Line station, funded in part by the FTA, is under construction and is scheduled to open in late 2018, connecting residents to downtown Boston in mere minutes. The Somerville Board of Aldermen adopted new zoning in 2009 that establishes Union Square as a Transit-Oriented District, reflecting community consensus for new multi-story mixed-use commercial and residential development. In 2012, state and local officials approved the Union Square Revitalization Plan, as part of an agreement with the MBTA, which required the City provide an easement alongside the new station. The Somerville Redevelopment Authority began in 2013 to acquire properties on “Block D-2” —the land adjacent to the new Green Line Station and a gateway to the Union Square’s center. In total, the seven Union Square disposition parcels identified in the Revitalization Plan can support 2.3 million square feet of development. To ensure equitable development, rather than allow piecemeal speculation, the City sought a Master Development Partner in 2014. After a long search, and with oversight from a resident-led Civic Advisory Committee (CAC) and input from community partners, the Somerville Redevelopment Authority selected Union Square Station Associates (US2) as its development partner, a joint venture of Magellan Development Group and RAS Union Square Development.

References:

Somerville by Design. (2015, Feb. 11). Creating an Employment Center in Union Square: Union Square Workshop #2. Retrieved from <http://www.somervillebydesign.com/wp-content/uploads/2015/04/US2-Development-Workshop-Real-Estate-Markets-Presentation-20150211.pdf>

SOMERVILLE: THE INNOVATION CITY

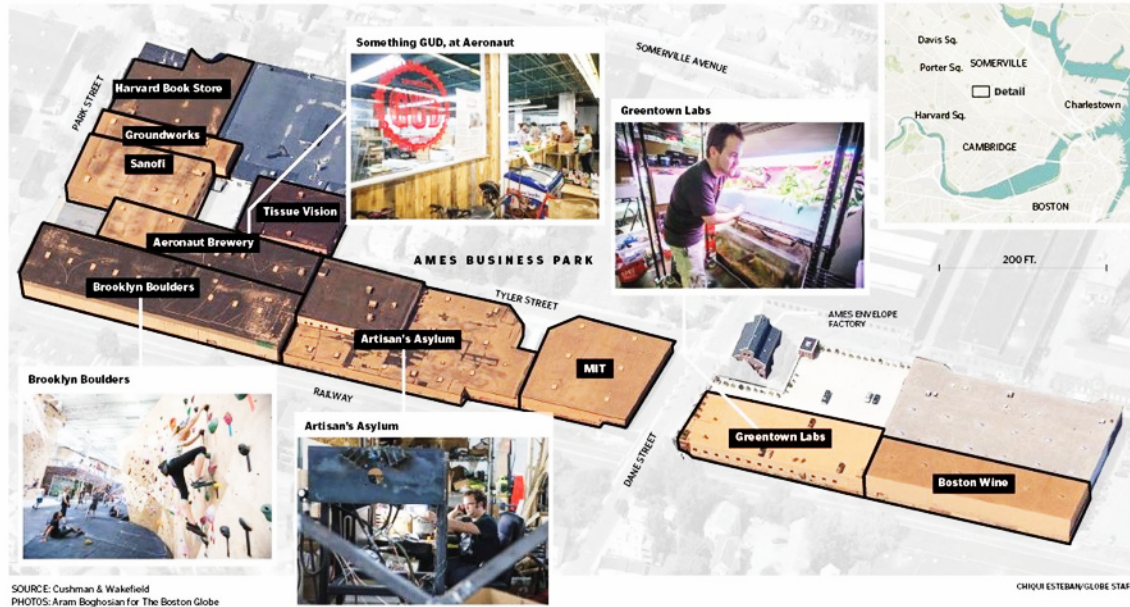


In the past ten years, Somerville has increasingly played an important role in the economic strength of the Boston Metropolitan Area. The City shares its southern border with Cambridge, and the MBTA Red Line connects Davis Square to Harvard, Central, and Kendall Squares - three Cambridge locations that are major economic drivers in the region - along with Boston's Financial District, Seaport District, Back Bay/South, and Longwood Medical Area.

Somerville is an attractive residential community with a dense and diverse housing stock. The City is home to many students who appreciate Somerville's convenient location near numerous educational institutions, including three of the nation's leading institutions of higher learning: Harvard, Tufts, and MIT. The City has a well-educated workforce and the unemployment rate within Somerville falls well below regional and national levels. More than 50% of Somerville's population holds at least a bachelor's degree or higher. Somerville also has a large foreign-born population—25% of residents—and this important and entrepreneurial population base adds to the eclectic and diverse nature of the City. According to the 2010 federal census, Somerville has the second highest proportion of residents between the ages of 25 and 34 in the United States.

In the past few years, incubator spaces for small businesses engaged in the creative economy have opened, including Greentown Labs, the Design Annex, Fringe Union, Form Labs, the Grommet and the nearby Artisan's Asylum. The new Brooklyn Boulders rock climbing and fitness

facility near Union Square has quickly become a gathering space for Somerville's creative community through art, culture, music and entrepreneurship. A lively local art, food and nightlife cluster exists in Union Square, which is actively nurtured by the organizations such as the Somerville Arts Council and Union Square Main Streets. The busy Union Square restaurant scene ranges from critically acclaimed fine dining at the likes of Journeyman, Casa B, and Bronwyn, which was named a Best New Restaurant of 2013 by Esquire magazine, to fun, urban oases such as A4 Pizza or Bloc 11 Café, well-loved restaurant pubs such as The Independent, and popular ethnic eateries like Machu Picchu, Ebi Sushi, Cantina Mexicana, Sweet Ginger Thai, The Neighborhood Restaurant and Bakery and more.



On weekends, Union Square is a crowded and active spot, with special events and civic gatherings. During the warm weather months, the Union Square Farmers Market brings people to Union Square by offering fresh, locally grown produce and locally produced products. Union Square is frequently the site of quirky events and arts happenings unique to Somerville. For example, more than 11,000 people flocked to the 8th Annual "What the Fluff Festival: A Tribute to Union Square Invention" in September 2014, roughly 8,000 attend the annual SomerStreets Halloween and Oktoberfest street festival, and many additional annual and one-time events year-round such as the Rock n' Roll Yard Sale, the Annual Beard Festival, the Mini Maker's Faire, the Ignite food festival, and the Circus Sock Hop draw visitors from across the region.

In recent years, Somerville has also received national recognition as a model of innovation and efficiency. With the City's aggressive implementation of new data-driven management procedures, Somerville has been recognized by the Boston Globe as "the best run city in the Commonwealth," and in 2009 and 2015 was again named an "All America City" by the National Civic League.

Moreover, the City of Somerville has seen firsthand the connection between economic growth and the availability of high-speed public transportation. The Davis Square MBTA Red Line Station

helped transform that neighborhood into one of Somerville's most vibrant economic and cultural engines with restaurants, cafes and entertainment venues, as well as home to more than 200 businesses.

HOME / NEWS / BOSTON GLOBE / MAGAZINE

PERSPECTIVE

The Model City

Somerville -- yes, "Slumerville" -- is outperforming its much bigger and wealthier neighbors. What can the Bostons and Wellesleys of the world learn from this little burg that could?



An agreement with the MBTA to construct a new Orange Line Station at Assembly Square paved the way for Federal Realty Investment Trust to begin construction of its "Assembly Row" mixed-use project. When complete, Assembly Row is expected to host approximately 1.75 million square feet of commercial/office/lab space, 500,000 square feet of retail space, a 200-room hotel and 2,100 residential units. To date, major tenants include a 12-screen AMC theatre, a LEGOLAND Discovery Center, Brooks Brothers, Saks Off Fifth, Legal Sea Foods, River Bar and Nike.

The City of Somerville has similar expectations that MBTA Green Line Service to Union Square will be an important element in enhancing the area and in realizing the goals set by the Union Square Revitalization Plan and the SomerVision process.

References:

Somerville Redevelopment Authority. (2013, Dec. 5). Request for Qualification for Selection of a Master Developer Partner for Certain Union Square Disposition Parcels. Retrieved from The City of Somerville: <http://www.somervillema.gov/sites/default/files/Union%20Square%20-%20Request%20for%20Qualifications%20for%20Master%20Developer.pdf>

PLANNING, VISIONING AND ZONING FOR UNION SQUARE'S REDEVELOPMENT

SOMERVISION



Starting in 2009 Somerville residents and City staff joined together in over 50 meetings, visioning sessions and public workshops, to develop [SomerVision](#), Somerville’s Comprehensive Plan for 2010-2030.

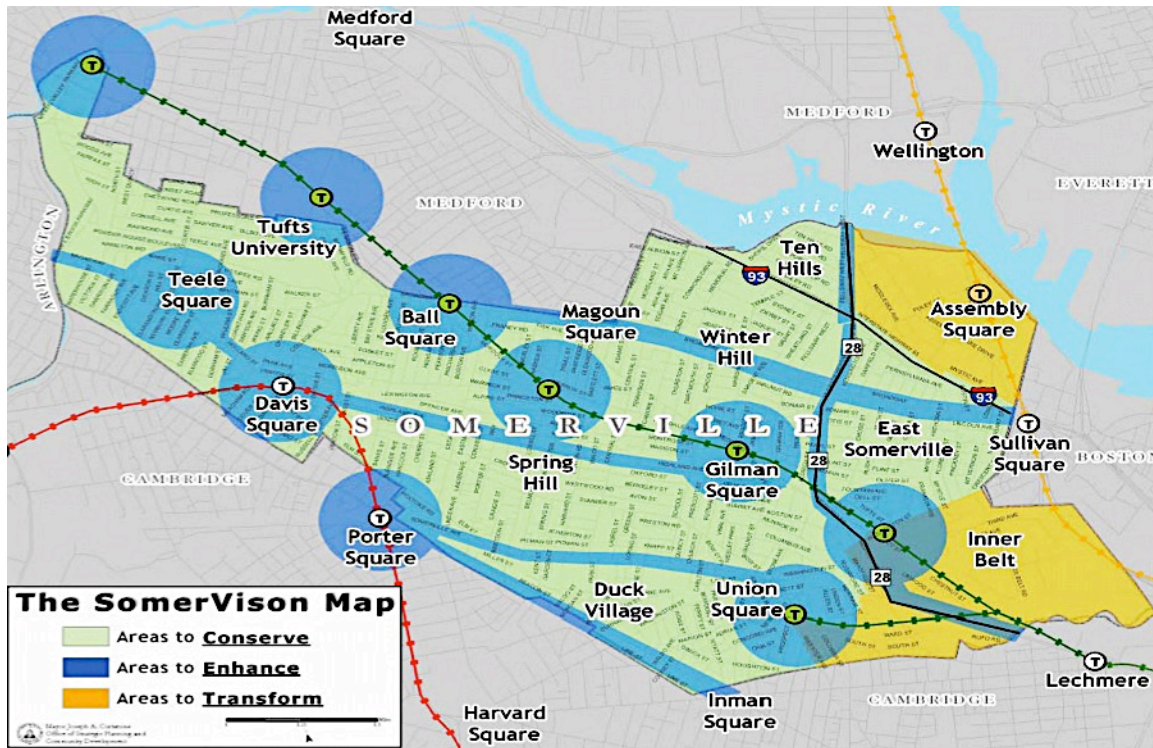
In a letter in the [Somerville Times](#) on November 25, 2013, Mayor Curtatone articulated the foundation that SomerVision established for the redevelopment of Union Square: “SomerVision calls for the creation in Union Square and Boynton Yards of 4,300 new jobs, 850 new housing units with a range of affordability, green and sustainable development, more public green space, transit-oriented and walkable streetscapes, and a true mixed-use neighborhood that seamlessly blends with the neighborhood and retains Union Square’s identity. This articulation of the goals for Union Square and Boynton Yards followed the community-driven rezoning of Union Square in 2009, which reflected the community’s desire to see new types of development, economic growth and employment opportunities in the area... Half of the blocks [in Union Square] have been rezoned to require affordable units far exceeding the 12.5 percent state requirement with 15 or 17.5 percent requirements.”

Through the city’s comprehensive planning effort [SomerVision](#), bold but achievable targets for the future of the city, were established. Those goals included:

- **30,000 New Jobs** as part of a responsible plan to create opportunity for all Somerville workers and entrepreneurs.
- **125 New Acres of Publicly Accessible Open Space** as part of our realistic plan to provide high-quality and well-programmed community spaces.
- **6,000 New Housing Units - 1,200 Permanently Affordable** as part of a sensitive plan to attract and retain Somerville’s best asset: its people. Based on the Dimensions of Displacement report compiled by MAPC in partnership with the City and SCC, Mayor Curtatone has called for potentially increasing this goal to 9,000 new housing units with 1,800 permanently affordable. The sustainable neighborhoods working group, formed by the City, is examining the feasibility of that increased goal.

- **50% of New Trips via Transit, Bike, or Walking** as part of an equitable plan for access and circulation to and through the City.
- **85% of New Development in Transformative Areas** as part of a predictable land use plan that protects neighborhood character.

The community’s focus on transformational areas in SomerVision proves to be essential to guiding the discussions about the redevelopment of Union Square. Not only does SomerVision recognize the potential for significant new development in Union Square, but others have also identified Union Square as a key area for new growth including its designation as a State Priority Development Area in the Commonwealth’s MetroNorth Regional Plan and as a 43D Priority Development Site.

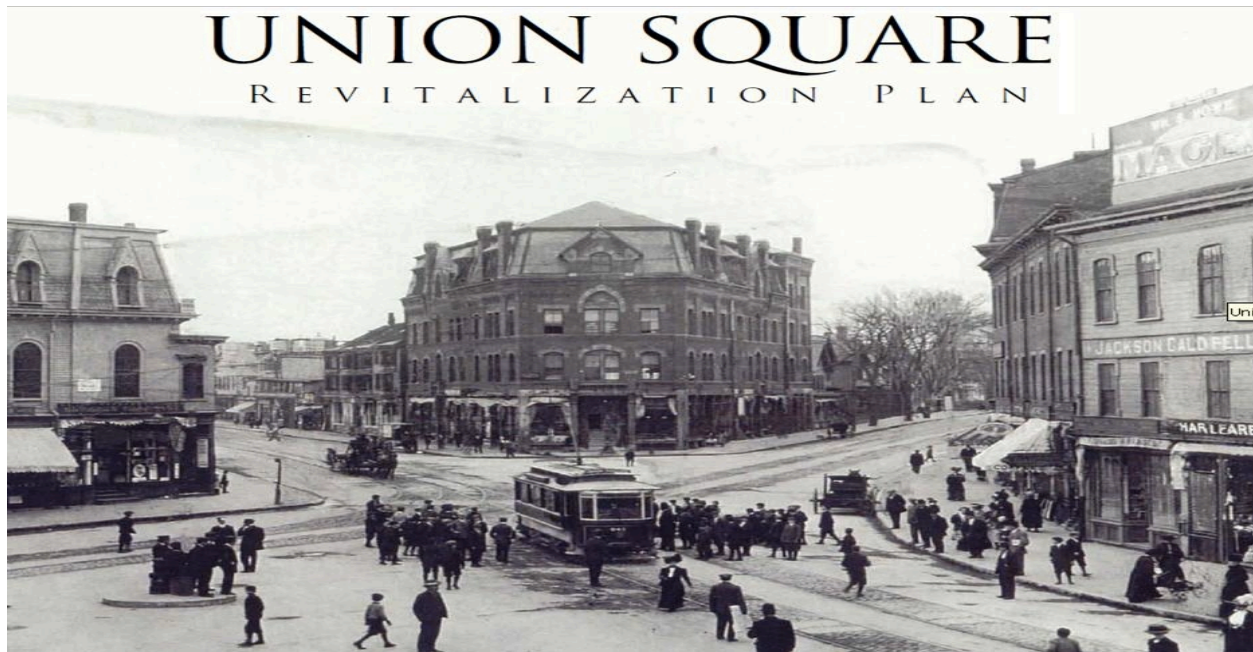


SomerVision acknowledges that specific neighborhood planning efforts, such as the ongoing Somerville by Design Union Square Neighborhood Planning effort, will need to be conducted to identify specifics related to types of land use, open space and neighborhood level-specific objectives. However, SomerVision also begins to identify the scale of development, open space and transportation that will need to be addressed in each neighborhood to meet the city’s overall growth goals, much of which will be focused in transformational areas such as Union Square.

References:

City of Somerville. (2012, Apr.). SomerVision: Comp Plan 2010-2030. Retrieved from City of Somerville: <http://www.somervillema.gov/spotlights/comp-plan>

The Somerville Times. (2013, Nov. 25). Letter from Mayor Curtatone on Union Square redevelopment. Retrieved from The Somerville Times: <http://www.thesomervilletimes.com/archives/44380>



The 2012 Union Square Revitalization Plan conforms to and promotes all ten of the Commonwealth's Sustainable Development principles by promoting pedestrian-oriented, multi-modal, mixed use development in line with the SomerVision Comprehensive Plan. "The authorizing statute for the Revitalization Plan is Massachusetts General Laws Chapter 121B, which empowers the Somerville Redevelopment Authority to characterize the Revitalization Area as a "Decadent Area" and prepare an "Urban Renewal Plan" for its rehabilitation. A revitalization plan under Chapter 121B provides certain benefits to local communities, including the ability to acquire and dispose of designated property. This planning tool, which has been successful in spurring the transformation of Assembly Square, is a necessary first step to providing both the transit and the transit-oriented development (TOD) that will revitalize the Union Square neighborhood."

The 2012 Union Square Revitalization Plan highlighted conditions in the Revitalization Area have existed for decades. No significant private investment has occurred in most of the properties for over fifty years; the overwhelming majority of parcels lack the minimum lot size required to meet current zoning; and the ordinary operations of private enterprise, acting alone, are unlikely to reverse these conditions. Obstacles that prevent private redevelopment from achieving the goals of the community include:

- Faulty parcelization;
- Obsolete street patterns;
- Flooding and unsuitable and/or contaminated soil;
- Incompatible land uses; and
- Deteriorated buildings and facilities.

Faulty Parcelization

Parcel sizes within the Union Square Revitalization Area range from 70 sq. ft. slivers of land to 7+ acre sites. Most of the residential properties in the area are situated on parcels of land averaging 3,000 square feet, which is typical and adequate for residential lots in Somerville. However, many of the commercial lots are similarly sized and are therefore too small for most commercial uses. In the 2009 rezoning, minimum lot sizes for the various zones mapped over key “transformation areas” were deliberately set at 15,000 sq. ft., 25,000 sq. ft., and 50,000 sq. ft. to require parcel assemblage for larger scale development.

In addition to the problem of parcel size, a number of property owners have arranged by lease or other agreement to use one another’s properties in ways that may make sense for their businesses today but limit options for development. Parcels that are oddly shaped and/or lack any relationship to the roadway network exacerbate this peculiar arrangement. Examples of these types of parcels can be found along the southeastern side of Prospect Street and throughout Boynton Yards, with particularly inaccessible and strangely shaped parcels to the north and south of the MBTA Fitchburg Commuter Rail Line right-of-way.

Obsolete Street Patterns

Another barrier to redevelopment is the street network in the Revitalization Area. Webster Avenue, Prospect Street, Somerville Avenue, and Washington Street need reconfiguration and upgrading to allow for better vehicular traffic flow and interface with pedestrian, bus, and bicycle modes. The City has awarded a contract to Parsons Brinkerhoff for planning and design of roadway improvements, along with below ground water and sewer infrastructure systems. The elevated portion of McGrath Highway acts as a barrier between Union Square and Somerville’s Inner Belt/Brickbottom district and will be restored to a street level boulevard by the Massachusetts Department of Transportation (MassDOT). In Boynton Yards, an urban street grid would allow for much higher density build out under the TOD zoning in effect for that area, as well as providing appropriate street frontage for ground floor restaurant, retail, and other business services.

Flooding And Unsuitable and/or Contaminated Soil

Miller’s River, which formerly ran through the project area was filled in many years ago, has left a legacy of flooding that is exacerbated by the aged storm water/sewer system in this area of Somerville. On July 10, 2010, municipal vehicles parked at the Public Safety Building in Union Square were damaged beyond repair during a flash rainstorm that flooded the area in a matter of minutes, at a cost to the City of over \$1 million. Although storm water and sewer systems in this area were separated as part of the recent MassDOT reconstruction of Somerville Avenue between Porter Square and Union Square, the limits of this MassDOT work stopped just short of Union Square, with the result that the separated systems continue to flow into the combined system at the Square, causing flooding at Somerville Avenue and Medford Street during peak storms.



The filling in of Miller's River is at least partially responsible for the prevalence of soils composed of coal ash and other debris materials unsuitable to support even mid-rise construction. Past and present industrial uses in the project area, including but by no means limited to such activities as sandblasting of lead coated products and cleaning of barrels containing industrial waste, are responsible for the prevalence of contaminated soils in the area.

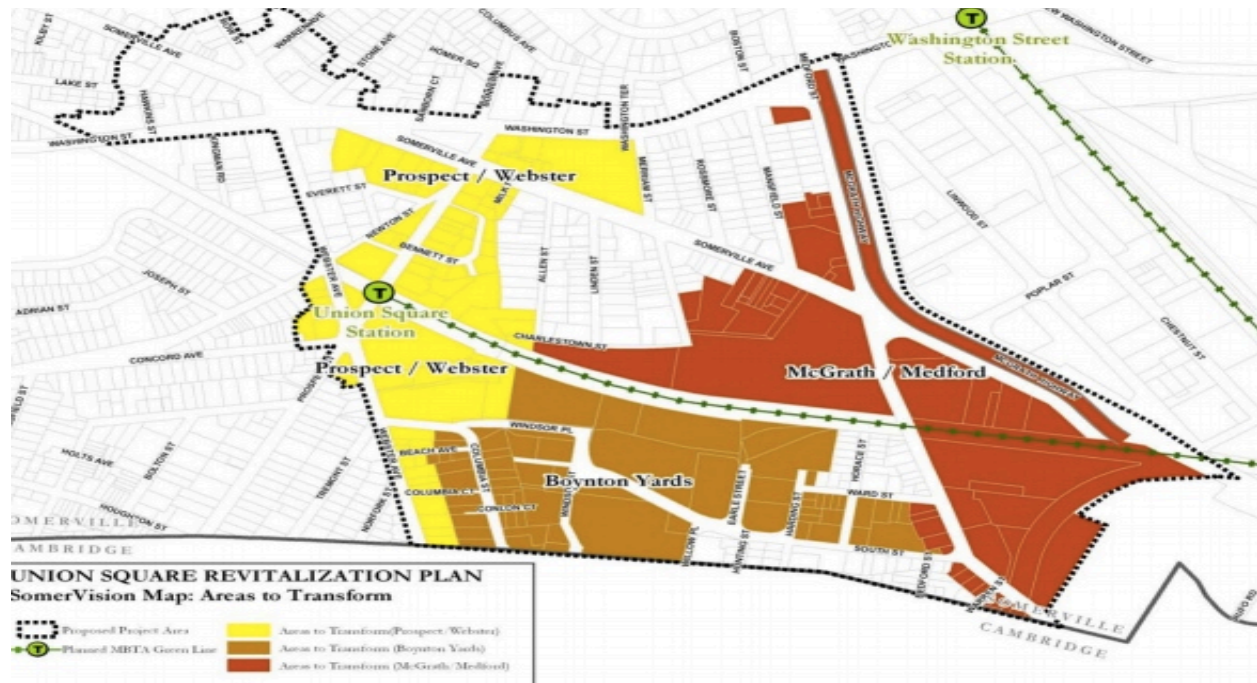
While the former Boynton Yards Plan remediated much of the soil contamination in that area, and the City is actively involved in cleaning a brownfield site at Prospect Street and Somerville Avenue, extensive environmental contamination remains.

Incompatible land uses

The Revitalization Area contains many one-story industrial buildings, warehouses and surface parking areas. Many of the businesses and land use types that exist in the Area today are a legacy of the industrial uses abutting the Fitchburg Rail Line and auto-related uses that developed following the closing of the Ford Assembly plant. These uses are a disincentive for private investment and redevelopment.

A significant portion of the land area in the Revitalization Area consists of surface parking lots. Some of these are accessory parking for retail uses. Some reflect outdated zoning requirements that mandate higher parking ratios than necessary. Others are contaminated sites that were capped with asphalt and never redeveloped. Two of the largest lots contain an auto salvage business and a towing business. The proliferation of surface lots negatively impacts adjacent sites and over-serves the parking demand.

Deteriorated buildings and facilities



In February and March of 2012, trained City staff conducted a local survey of the external physical condition of all properties and structures within the Revitalization Plan boundary. The survey had five sections: (1) Roof, Exterior Finish, (2) Entrance, Doors, Porches, (3) Gutters, Downspout, (4) Parking, Yard, Fences, (5) Soffits and Eaves. The surveyors rated each property for all sections and then determined an overall evaluation of the property.

There are 487 parcels within the Revitalization Area. Five of these parcels are part of the railroad infrastructure and were not surveyed. Out of 482 parcels surveyed, 164 parcels received a general survey evaluation of either “moderate disrepair” or “severe disrepair”. This constitutes over 34% of the properties within the Revitalization District boundary. In addition, another 170 properties received a “satisfactory” evaluation, meaning that these properties had received a rating of “moderate disrepair” or “severe disrepair” on one of the survey sub-components. The inclusion of these parcels brings the ratio of properties with some evidence of disrepair to nearly 70%.

References:

City of Somerville. (2012, October). Union Square Revitalization Plan. Retrieved from City of Somerville: http://www.somervillema.gov/sites/default/files/UnionSquareRevitalizationPlanFINAL_0.pdf

FUTURE DEVELOPMENT IN UNION SQUARE

The Union Square Revitalization Plan includes three distinct geographic areas within the boundary of the Union Square Revitalization District that are targeted for transformational redevelopment: namely, (1) the Prospect/Webster Corridor; (2) Boynton Yards; and (3) the McGrath/Medford Corridor. Though the Prospect/Webster Corridor is targeted for the most immediate redevelopment potential and has been the area of focus during the ongoing Master Developer selection process, the longer term potential for the redevelopment of Boynton Yards and the McGrath/Medford Corridor play an important role in Somerville’s long-term vision for transforming underutilized areas.

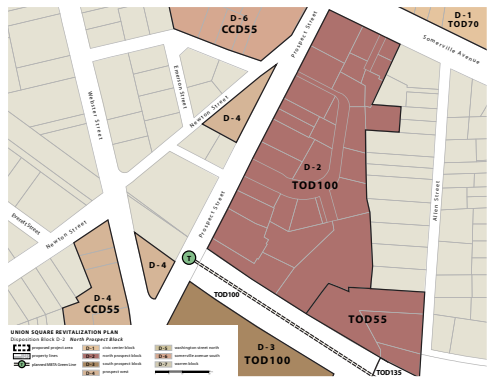
Plan Area = 429 acres		
Parcel	Square Feet (sq. ft.)	Notes
D-1	112,500	
D-2	187,983	
D-3	182,733	
D-4	52,338	4 lots within D-4; 70 Prospect has 8,620 sq. that is currently being developed.
D-5	45,087	
D-6	68,456	
D-7	54,288	

Prospect/Webster Corridor

The key areas of redevelopment within the Prospect/Webster Corridor are made up by the seven Disposition Blocks identified by the 2012 Union Square Revitalization Plan and are part of the scope of the ongoing Somerville By Design Neighborhood Planning Process for Union Square. The collection of Disposition Blocks represent a conscious effort to utilize large scale development and enhancement of the area to create new economic opportunity for the City and its residents. Under the current 2009 zoning, approximately 2.3 million square feet of new mixed-use development could be accommodated. It is anticipated that the Somerville By Design process will, upon completion, lead to proposed changes and updates to the current Union Square zoning. In concert with the coming of the new MBTA Green Line, development of the seven Disposition Blocks is intended to provide new employment and housing opportunities, create quality open space and bring a new sense of vitality to existing businesses and residents.

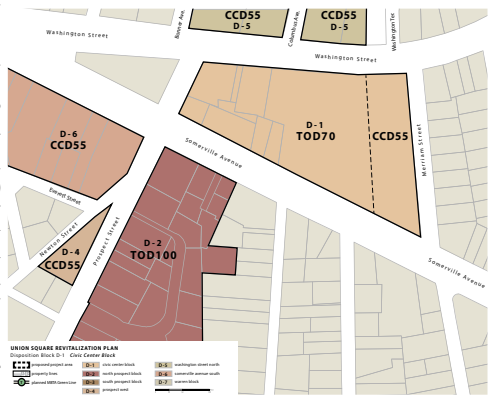
Though somewhat outdated, Tables 4-1 through 4-8 in the Revitalization Plan include the address; owner, land sq. ft., m/b/l, and FY12 assessed values of the Disposition Block Parcels. Updates include, but may not be limited to new ownership of the Post Office, complete ownership of D-2 parcels by the Somerville Redevelopment Authority, and 70 Prospect Street is currently under construction.

The North Prospect Block (D-2)



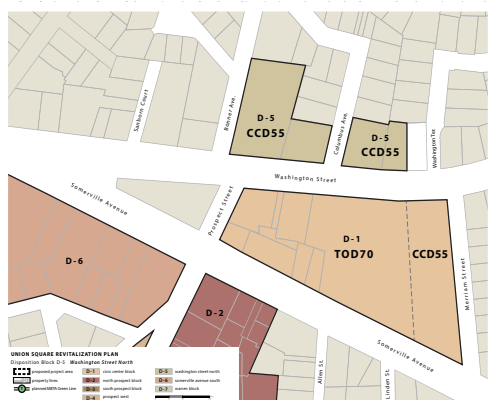
North Prospect Block includes the existing properties on the east side of Prospect Street between the Union Square Station and Somerville Avenue, including Bennett Street. The southern portion of this block will be the site of the new Union Square Green Line Station. The Master Developer is expected to create a mixed-use project including first-floor retail, restaurant, and service establishments, with upper story commercial office, R&D and residential use. The total land area of the D-2 Block is calculated at +/- 169,427 square feet or 3.89 acres. Most of the D-2 Block is located in a Transit Oriented Development sub-district, classified under the current zoning as TOD-10.

The Civic Center Block (D-1)



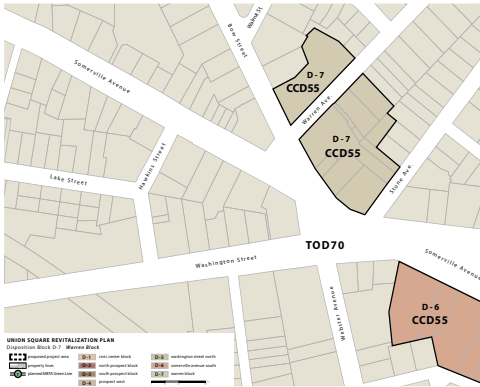
The Civic Center Block includes the existing Public Safety Building as well as properties such as Ricky's Flowers, which should be a vital part of an enhanced Union Square. This is anticipated to be an area in which a public/private partnership could allow for the development of a new civic node in the historic core of the Square as well as the possibility for structured belowground parking. When combined with the publicly owned properties, the development block is expected to comprise approximately 110,697 sq. ft. or 2.54 acres. Most of the D-1 Block is classified under the current zoning as a Transit Oriented Development sub-district.

Somerville Avenue South Block (D-6)



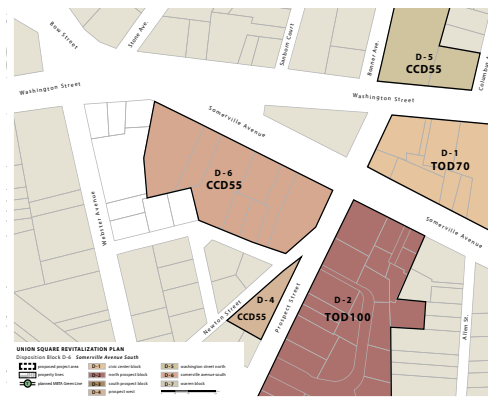
The Somerville Avenue South Block is in the heart of Union Square and includes a number of automobile-oriented uses and businesses in structures that are underdeveloped. This Block is anticipated to be redeveloped as mixed-use, including first-floor retail, restaurant, and service establishments, with office, other commercial and/or residential uses above. The D-6 Block encompasses approximately 67,921 sq. ft. and is classified under the current CCD-55 regulations.

Washington Street North Block (D-5)



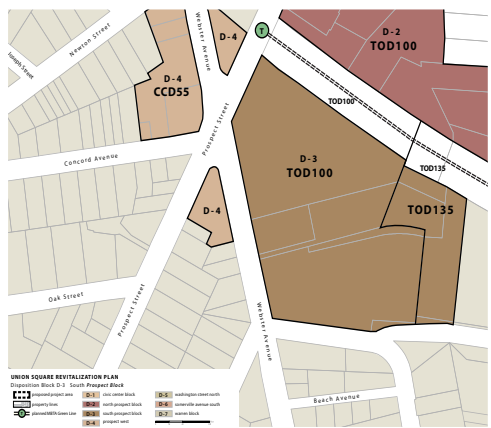
The Washington Street North Block includes the current Union Square Post Office and [two] adjacent lots on the north side of Washington Street. The United States Postal Service has sold the property to an owner who is in discussions with the City to maintain public access to the lobby mural and to operate the building for arts-related uses including the performing or visual arts. The re-use of the Post Office will benefit from the redevelopment of the adjacent auto-related uses into mixed-use development that can potentially include retail, office, residential and/or commercial. The properties adjacent to the Post Office can be developed according to the CCD-55 zoning district.”

The Warren Block (D-7)



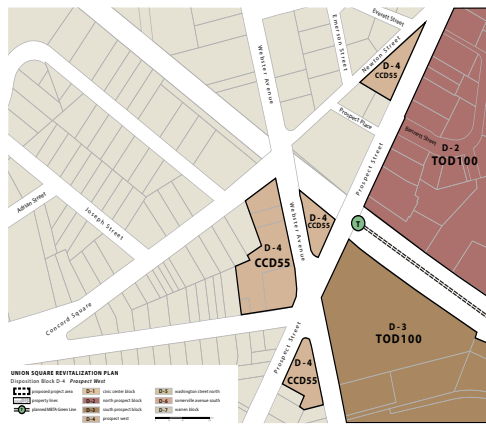
The Warren Block, identified as D-7, consists of approximately 51,075sf. Located within the D-7 Block are an existing bank and a large open air parking lot on one side of Warren Avenue. The remainder of the Block is occupied by an automotive related business on the opposite side of Warren Avenue. The parcels in the Warren Block are currently zoned CCD-55.

South Prospect Block (D3)



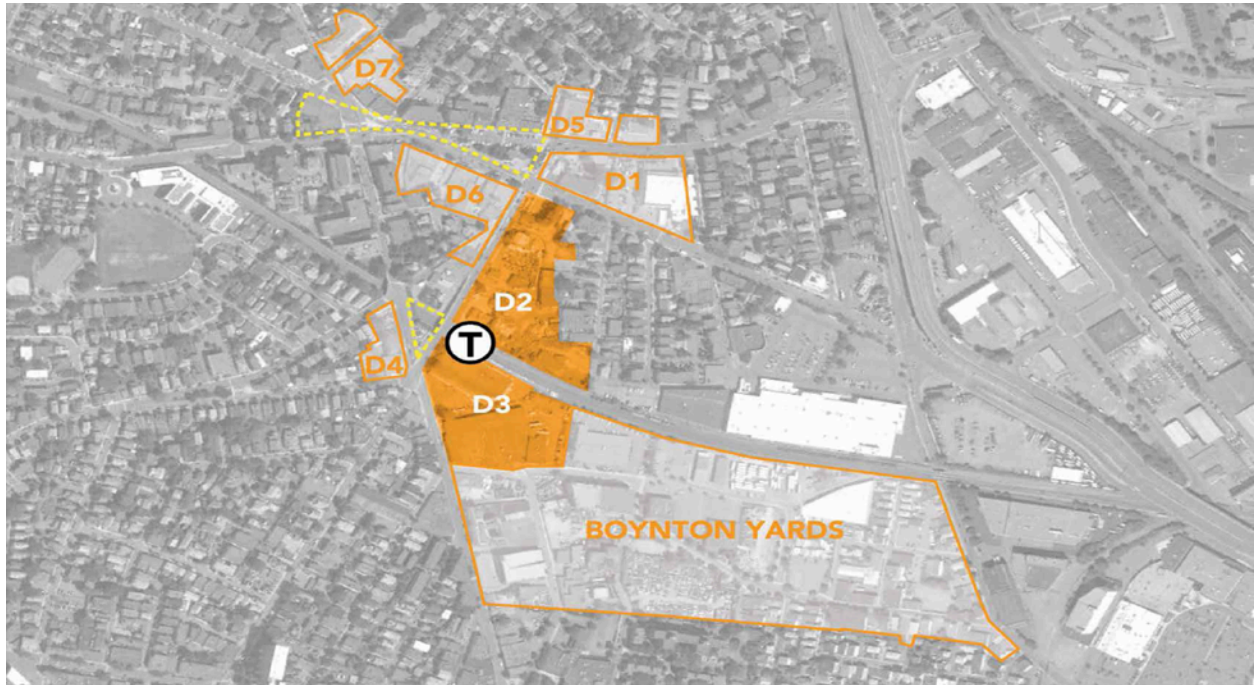
The South Prospect Block is the gateway to Boynton Yards. Development on the South Prospect Block is anticipated to be mixed-use with first floor retail, restaurant, and service uses, and upper story office, R&D and/or residential uses. The South Prospect Block will ideally be redeveloped to the maximum height and bulk allowed under Transit Oriented Development status. The City’s Master Development partner has represented that they have entered into an agreement with the owner of the Beacon Sales building for the development of that portion of the D-3 Block.

The Prospect West Block (D-4)



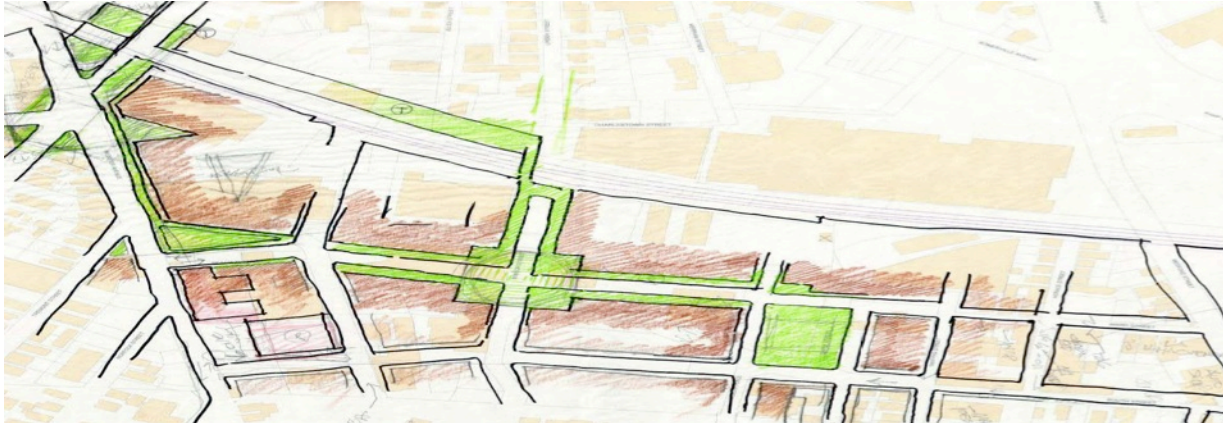
The West Prospect Block consists of a number of small parcels with auto-related uses at the intersection of Prospect and Webster streets. To complete the transit-oriented, mixed-use vision for the Revitalization Area, the 2012 Plan anticipates that these auto-related uses will be replaced with the mixed-use development allowed under the current CCD-55 zoning district. Some portions of these parcels may also be absorbed into the roadway realignment; other public infrastructure improvements or public space needs to ensure safer and more efficient access to the Union Square Station entrance.

Boynton Yards



The Union Square Revitalization Plan calls for a series of later-term actions in Boynton Yards, a 35-acre industrial area located south of the Fitchburg Commuter Rail right-of-way between Webster Avenue and Medford Street. Despite Boynton Yards' advantages including direct proximity to Kendall Square and updated zoning regulations, private enterprise alone has not been sufficient to achieve redevelopment of this area. Boynton Yards is challenged by large amounts of open space that can be characterized as decadent. By including Boynton Yards in the Revitalization Plan, the SRA and the City of Somerville can play an active role in creating public/private partnerships with

owners and developers to ensure that maximum funding resources are brought to the development table. While no Acquisition Parcels have been designated in Boynton Yards at this time, this plan contemplates significant investment in public utility and public roadway infrastructure that would require parcel assemblage. As appropriate, this Plan may be amended in the future including the addition of a budget for Transformation Area #2 when additional acquisition and/or disposition properties have been identified.



The City and the SRA will continue to work with stakeholders to accomplish these goals over the course of the next several years. Obsolete street patterns are a major impediment to private redevelopment in Boynton Yards. The City of Somerville has engaged a consultant team to evaluate alternative designs for a new internal network of streets that will make Boynton Yards a more coherent and developable district. The above rendering shows one conceptual design for that street network.

McGrath/Medford Corridor

This plan calls for a series of later-term actions in the McGrath/Medford Corridor, a 32- acre industrial and strip commercial area located along the McGrath Highway and Medford Street. Despite the corridor area's advantages including highway access to downtown Boston and updated zoning regulations, private enterprise alone has not been sufficient to achieve redevelopment of this area. While no Acquisition Parcels have been designated in the McGrath/Medford Corridor at this time, many of the infrastructure investments included in the 2012 Union Square Revitalization Plan will occur in this area. By including the McGrath/Medford Corridor in the Revitalization Plan, the SRA and the City of Somerville can utilize a more comprehensive approach to redevelopment and infrastructure planning in this portion of the project area.

Obsolete street patterns are a major impediment to private redevelopment in the McGrath/Medford Corridor, but they also have profound implications for traffic flow and the pedestrian environment in Union Square. The Massachusetts Department of Transportation has engaged a consultant team to evaluate alternative designs that return the elevated McGrath Highway viaduct to grade and improve key intersections at Washington Street, Medford Street and Somerville Avenue. Preliminary findings from this study suggest that traffic-engineering solutions for the

McGrath/Medford Corridor must be planned in concert with improvements to the intersection of Prospect Street and Somerville Avenue in the heart of Union Square. This study will lead to an environmental analysis for a grounded facility for the corridor that will include a more detailed design and timeline for implementation.



The City of Somerville is in support of an at-grade McGrath highway/de-elevation of the McCarthy overpass. In 2007, Somerville was successful in reducing the amount of funding for the existing structure to the minimum needed to keep the facility safe until an at-grade solution could be designed. Significant community outreach has been done; at a meeting on May 31, 2012, over 75 people were in attendance and not one community member spoke in favor of keeping the existing structure. In May 2014, MassDOT released a final report recommending replacing the McCarthy Overpass on McGrath Highway with a six-lane at-grade urban boulevard.

References:

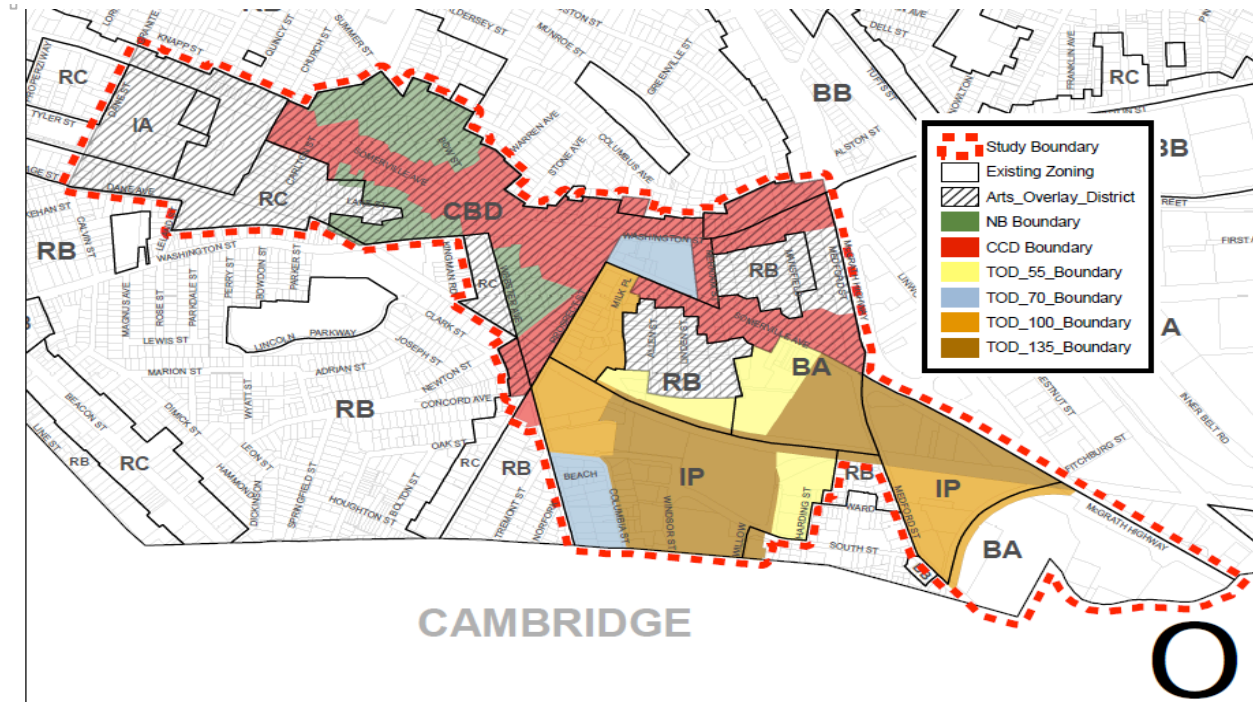
City of Somerville. (2012, October). Union Square Revitalization Plan. Retrieved from City of Somerville: http://www.somervillema.gov/sites/default/files/UnionSquareRevitalizationPlanFINAL_0.pdf

UNION SQUARE NEIGHBORHOOD PLAN – SOMERVILLE BY DESIGN

The City of Somerville began an in depth planning and visioning exercise for Union Square in late 2014. This process is being conducted by the City of Somerville in concert with the project team of Principle Group (planning), Tischler Bise (fiscal analysis), Parsons Brinkerhoff (infrastructure), Utile (design), Gehl Studio (public space / public life), and Spurr (Lincoln Park Project). The planning effort kicked off with a crowdsourcing event on December 17, 2014 followed by two public visioning sessions on January 7 and 31, 2015. After several workshops and a three-day design charrette, the planning team held a community open house in May 2015 to gather a second round of feedback and refine the ideas the project team had gathered to date. One June 24, 2015 the project team made a presentation to the public aimed at gathering feedback on massing and height scenarios for the future build out of Union Square. Also included was a fiscal impact analysis of the revenue or losses the city may expect as a result of the different built out scenarios modeled with greater amounts of public space; the build out scenario used during the design charrette. A draft of the Union Square Neighborhood Plan is expected to be available for community review and feedback in October 2015.

EXISTING ZONING

In 2009 the City of Somerville undertook an extensive public process to rezone Union Square. The rezoning preserved existing residential areas of Union Square but added new mixed-use districts such as, the Corridor Commercial District (CCD-55) and four different Transit- Oriented Districts (TOD-55, TOD-70, TOD-100, and TOD-135). They were mapped over parcels identified in this Plan as part of the Revitalization Area.



Property owners and developers have access to “Use Clusters,” a regulatory mechanism that provides a greater level of categorical flexibility between uses that have similar impacts. Provided they are under the square footage limit that would require a Special Permit for approval, individual uses categorized within the same cluster can come and go by right, while uses not expressly authorized in the clusters are prohibited.

The 2009 zoning applied to Union Square was designed to be responsive to changing market conditions while maintaining high standards for building design and construction, including an emphasis on sustainable development and green building standards.

References:

- City of Somerville. (2012, October). Union Square Revitalization Plan. Retrieved from City of Somerville: http://www.somervillema.gov/sites/default/files/UnionSquareRevitalizationPlanFINAL_0.pdf
- City of Somerville. (n.d.). OSPCD - Union Square Zoning. Retrieved from City of Somerville: <http://www.somervillema.gov/departments/ospcd/planning-and-zoning/union-square-zoning>

SOMERVILLE-WIDE ZONING OVERHAUL

Somerville is in the process of completing a zoning overhaul for the City, one of the implementation priorities of SomerVision. The overhaul will implement zoning for completed Somerville by Design neighborhood plans. The City's Planning Department estimates that in 2016 the Board of Alderman will consider a new draft of the zoning. Some of the key highlights of the new zoning may include:

- In areas of the city where major new development is planned, up to 20% of new units must be set aside for affordable housing.
- Orienting the production of affordable housing to transit accessibility, further reducing costs for households that need affordable units.
- Increasing the diversity of housing types, unit size, and price points by promoting a range of building types permitted in each district.
- Ensuring that infill development fits into the form, scale, and pattern of existing neighborhoods and squares.
- Incentives for small, local businesses.
- Restrictions on permits for formula businesses (chains) and big-box stores (retail over 10,000 square feet) by special permit.
- Allowing artists to now work at home and not just in certain districts by permitting creative studios in the Neighborhood Residence districts.
- Supporting the development of new corner stores and permits the adaptive reuse of commercial buildings located in Neighborhood Residence districts into corner stores.
- Permitting the adaptive reuse of former civic, institutional, or municipal buildings located in Neighborhood Residence districts into arts and creative economy uses.
- Establishment of transit-oriented parking standards across the entire city.
- Focus on development intensity within a quarter-mile of existing and future MBTA transit stations.

References:

City of Somerville. (n.d.). Zoning Overhaul. Retrieved from City of Somerville:

<http://www.somervillema.gov/zoning/>

City of Somerville. (n.d.). Zoning Overhaul: Key Changes in the New Code. Retrieved from City of Somerville:

<http://www.somervillema.gov/zoning/key-changes.html>

McLean, D. (2015, Apr. 10). Everything you wanted to know about Somerville's new zoning plan but were afraid to ask. Retrieved from Somerville Journal:

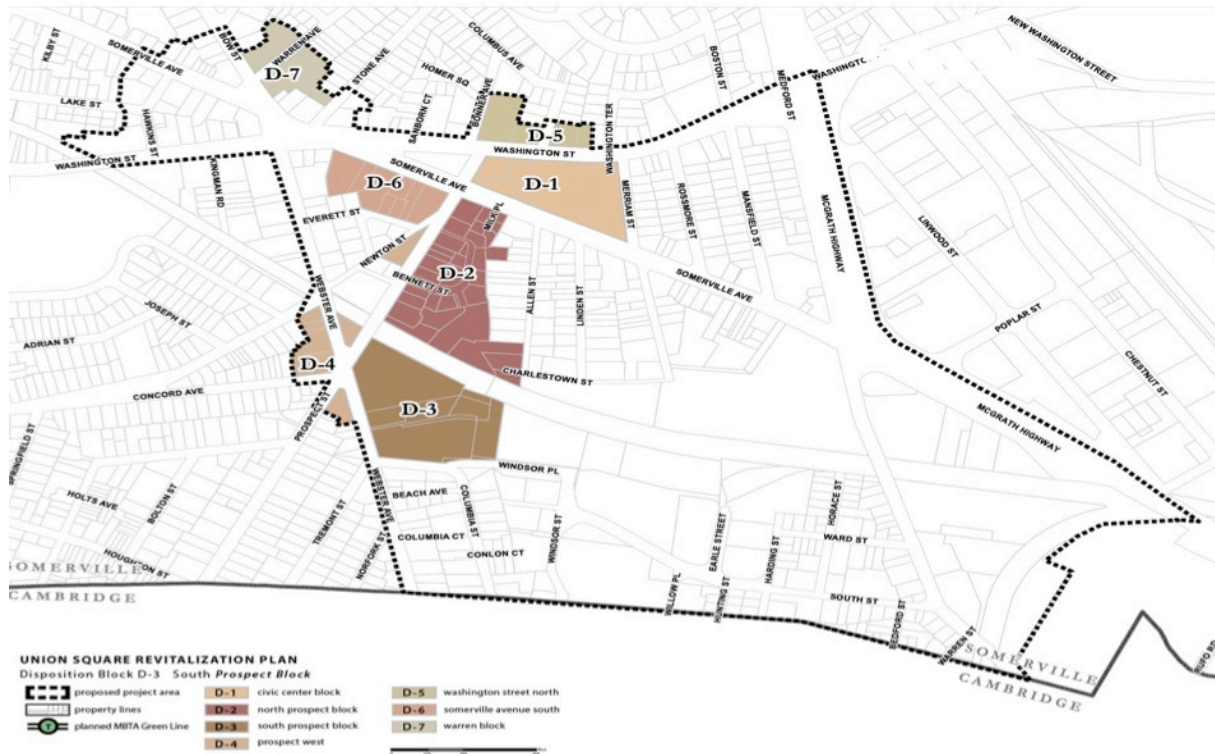
<http://somerville.wickedlocal.com/article/20150410/NEWS/150419737/?Start=1>

MASTER DEVELOPER PROCESS

REQUEST FOR QUALIFICATIONS

The Somerville Redevelopment Authority issued a Request for Qualifications (RFQ) from Master Developers on December 5, 2013. The RFQ states “The goals for the revitalization of Union Square include bringing in light rail transit in order to generate at least 600,000 square feet of new commercial space, 1,800 new jobs and 350 new housing units for Somerville residents of all socio-economic levels as part of the first phases of the Plan.” (pg.13)

After hearing from all nine of the master developer candidates, the CAC voted to narrow down its list to four recommended finalists: The Abbey Group, Federal Realty/National Development, Gerding Edlen, and US2. In late May, a 10-person Due Diligence Team traveled to tour projects of the master developer candidates in Bethesda (Federal Realty), Chicago (US2), Portland (Gerding Edlen) and San Jose (Federal Realty) and toured projects by The Abbey Group in Boston in early June.



Reference:

Somerville Redevelopment Authority. (2013, Dec. 5). Request for Qualification for Selection of a Master Developer Partner for Certain Union Square Disposition Parcels. Retrieved from The City of Somerville: <http://www.somervillema.gov/sites/default/files/Union%20Square%20-%20Request%20for%20Qualifications%20for%20Master%20Developer.pdf>

SELECTION OF UNION SQUARE STATION ASSOCIATES AS MASTER DEVELOPER

Union Square Station Associates (US2) was unanimously selected by the Somerville Redevelopment Authority (SRA) as the master developer for the Union Square revitalization plan at the SRA's meeting on Thursday, June 26, 2015.

Union Square Station Associates (US2) is a development team formed specifically for the Union Square project and a joint venture between Magellan Development Group LLC and RAS Union Square Development LLC. The specific corporate entities comprising the joint venture are Magellan US2 LLC (owned by Magellan Development Group LLC) and RAS Union Square Development LCC (owned by Richard A. Stein and Gregory Karczewski formerly of Mesirow Financial Real Estate Consulting LLC). James Loewenberg and Richard Stein are Co-CEOs for US2, and Gregory Karczewski is the President. Mesirow Financial will play a leading role in obtaining project insurance, bonds and is a potential equity funding source for the development projects. Stantec is the local development consultant and lead urban planner.

Chicago-based Magellan is perhaps best known for its \$4 billion Lakeshore East development, a neighborhood of high-rise apartments, condominiums and retail on a 28-acre site just northeast of Millennium Park. Another notable project is Magellan's infill redevelopment of University Village at the University of Illinois – Chicago, which included significant historic preservation. In 1997, Mesirow acquired the firm that Stein founded, Stein & Co. Among the reasons US2 was chosen are its financial capacity and its significant expertise in managing large, complex projects that often require expensive infrastructure upgrades and environmental remediation—not unlike the project in Union Square.

US2 has also pulled together a highly regarded team of local professionals to join them on the Union Square project. The team includes John Rattigan of DLA Piper as legal counsel; Paul Scappicchio, president of Sage Consulting Services and former Boston City Councilor, as advisor; Ralph DeNisco of Nelson/Nygaard as transportation advisor; Drew Leff of Stantec as project executive; and several local architects including Deborah Fennick as movement czar, Katie Faulkner, Meijin Yoon, Eric Hoewler, Jeanne Gang, David Hacin and David Morrow as construction manager.

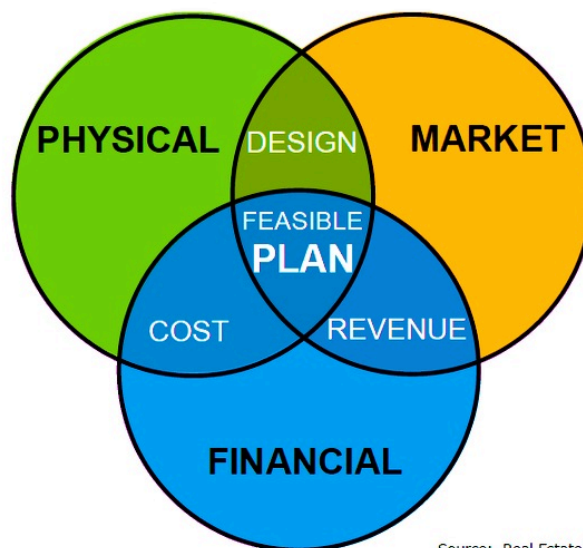
References:

- Matthews, D. L. (2014, June 30). Magellan, Mesirow picked to develop massive project near Boston. Retrieved from Crain's Chicago Business: <http://www.chicagobusiness.com/realestate/20140630/CRED03/140639990/magellan-mesirow-picked-to-develop-massive-project-near-boston>
- US2. (n.d.). A Collaboration Shaping the Future of Union Square. Retrieved from US2: <http://www.us2unionsquare.info/#us2>

PRIVATE DEVELOPMENT ECONOMICS

A private development is a feasible project that has sufficient economic return to cause lenders to provide loans, equity investors to invest and developers to risk their resources. Understanding the nuances of a private development is essential in order to ensure that a public private collaboration yields a plan that meets community objectives and is financially feasible. Within the planning process, the developer represents the future occupants of the building to ensure they can deliver an environment that tenants will want to lease and at an acceptable price.

HOW DOES DEVELOPMENT WORK?



Essentially, a private developer has 3 main components to consider: Physical, Market and Financial. The investors return requirements drive feasibility. The market value must be greater than cost in order to have a return on investment or profit to compensate investors for risk. There are many variables to defining risk:

- Market Risk – competition through economic changes;
- Construction Risk - budget overruns and/or unforeseen conditions and events;
- Site Risks - soils, hydrology and environmental;
- Operating Risk - operating expenses or ongoing leasing;
- Entitlement Risk - permit approvals, exactions, and impact fees;
- Financial Risk - attract lender/investor, rate risk;
- Acquisition Risk - acquisition cost, title & easements

Market Value is dictated by the investment market, property income, and income growth. Market Value is also driven by rents and escalation; absorption; occupancy; tenant credit; capital market risk; and real estate market risk.

Project Cost Components:

- Land Acquisition
- Hard Costs
 - Construction
 - Environmental remediation
 - Infrastructure
- Soft Costs
 - Architecture/Engineering
 - Legal
 - Permits
 - Marketing
 - Management
- Financing Cost
- Community Benefits

The larger the scale and/or density of the overall project, the greater the opportunity to provide more master improvements or community benefits. These fixed costs can be spread out over a larger number of development square feet.

Funding sources include investors, lenders and alternative sources such as grants, governments programs, subsidies, etc. Prior to being approved for funds, investors and lenders require a solid development plan with pre-leasing market certainty, sufficient debt coverage, sufficient returns on cost on investment and the credibility of the developer.

References:

US2. (2015, Feb. 11). Somerville by Design. Retrieved from Create an Employment Center in Union Square: Union Square Workshop #2: <http://www.somervillebydesign.com/wp-content/uploads/2015/04/US2-Development-Workshop-Real-Estate-Markets-Presentation-20150211.pdf>

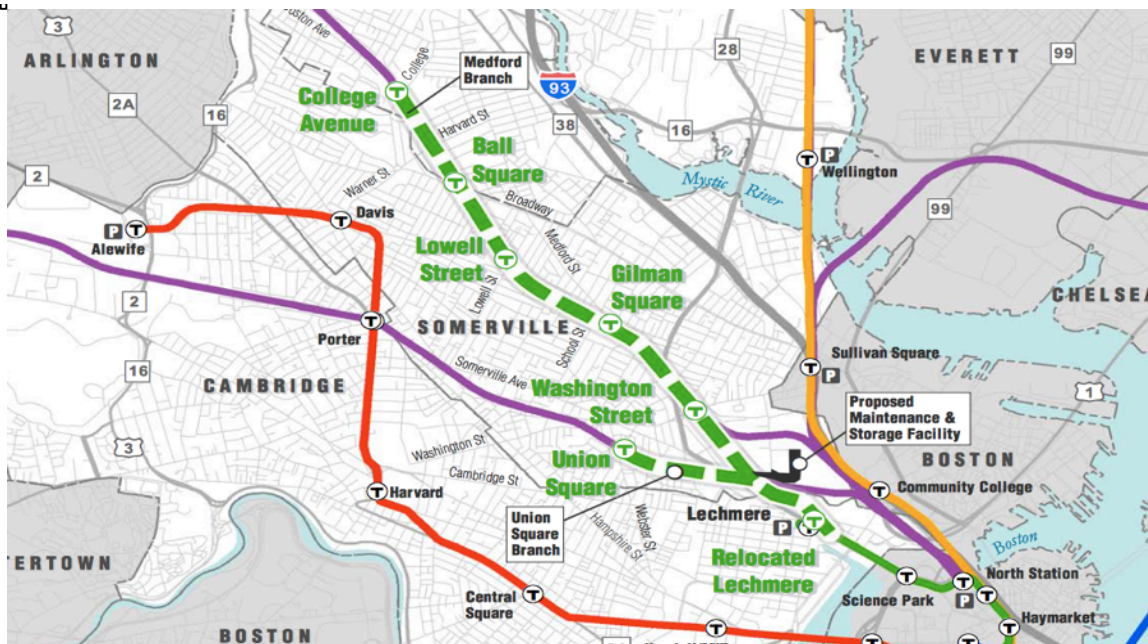
INFRASTRUCTURE

UNION SQUARE GREEN LINE STATION

The following summary from the Union Square Main Streets website gives a wholesome overview of Union Square's history as a transit-oriented location and the challenges the square has faced in the absence of transit for many years. The website also has a collection of updates about public meetings related to the Green Line Extension planning process:

Union Square, perhaps more than any other place in Somerville, grew up around public transit. Originally "a streetcar suburb," the central business district of Union Square once had 108 visits from the trolley each day. Then, like many other American cities, private cars came to dominate our neighborhood, bringing pollution and streets hostile to pedestrians. The construction of Route 93 through Somerville, along with a web of diesel trains passing through, created significant health impacts in our community. Somerville has the most excess lung cancer and heart attack deaths per square mile of any of Massachusetts' 350 cities and towns.

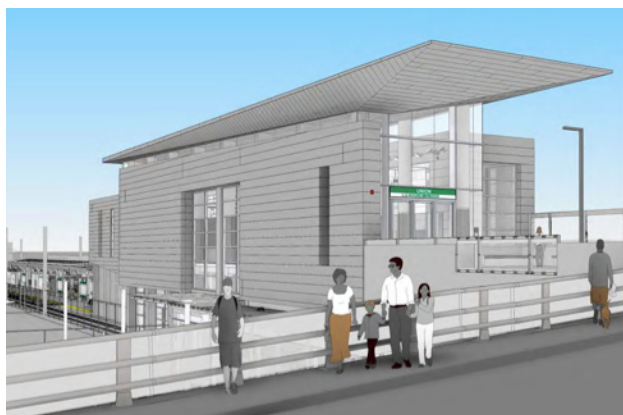
Even though Union Square is only 2.5 miles from downtown Boston, it can take up to 30 minutes by bus and subway to arrive at North Station. Just as the Red Line MBTA stop in Davis Square revitalized that commercial center, the improved transit network is expected to help Union Square grow exponentially. While Union Square is the city's first business district and is the same size as Davis Square, Union Square's total assessed values are just 58% of those of its sister square in the West, with commercial properties even lower at 40%.



With this promise of mass transit Union Square Main Streets is putting an emphasis on transit-oriented development and developing pedestrian oriented activity. The Union Square Green Line

Station is currently scheduled to be open in late December 2017 early 2018. Many organizations in Somerville played key roles in advocating for the Green Line Extension and for that extension to include a branch providing service to Union Square. One of the organizations that played a prominent role in this conversation is Somerville Transportation Equity Partnership (STEP), a community group dedicated to improving transportation in Somerville that advocates for the Green Line extension, a more livable city, and public health issues.

The following images of the future Union Square Station can be found on an interactive Green Line Extension map on the STEP website. This interactive map includes renderings of the future stations, maps and visuals showing how the stations will interact with existing infrastructure and street networks.



In conjunction with the Massachusetts Bay Transportation Authority (MBTA), the Somerville, Medford and Cambridge Arts Councils will commission multiple artists to design an integrated art program for the Green Line Extension stations. The MBTA released a [Request for Qualifications](#) for artists in 2014 and will work with selected artists as station construction moves forward.

References:

(n.d.). Retrieved from Somerville Transportation Equity Partnership:

Green Line Extension. (n.d.). Retrieved from Commonwealth of Massachusetts:

<http://greenlineextension.eot.state.ma.us/>

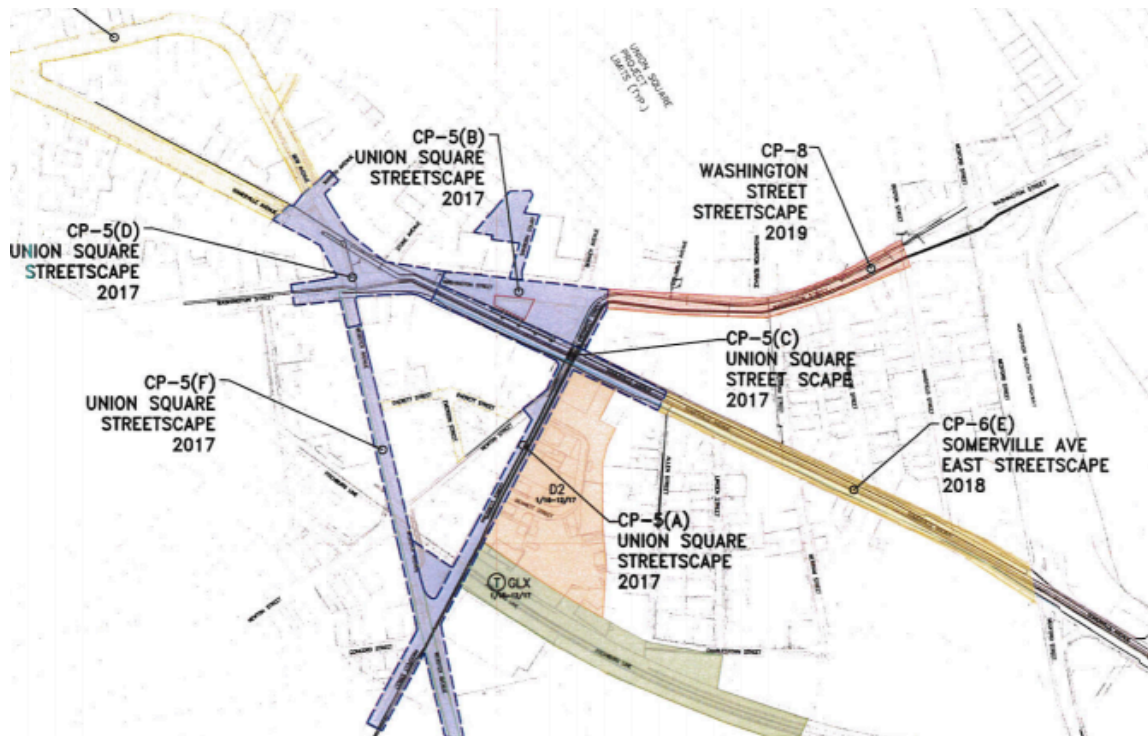
Greenline. (2014, Dec. 16). Retrieved from Union Square: <https://unionsquaremain.org/grow/greenline/>

INFRASTRUCTURE IMPROVEMENTS

The City of Somerville has done significant work to assess the infrastructure upgrades that will be needed to support a redeveloped Union Square. Among these issues is addressing the significant flooding experienced in Union Square caused by Miller's River which was filled in 1876 and is exacerbated by outdated combined storm water and sewer system. Union Square infrastructure upgrades will also address roadway congestion caused by significant levels of "cut through" traffic

seeking a destination beyond the square and pedestrian and other multi-modal improvements to increase safety for the residents, workers and visitors of Union Square.

In total, the City estimates that \$100M in infrastructure upgrades will be needed to support the redevelopment of Union Square. The \$100 million figure, however, does not address improvements needed in Boynton Yards. The 2013 Boynton Yards Streetscape and Utilities Study by Parsons Brinkerhoff provided a working estimate of \$30 million for water, sewer, drainage and roadway needs.



Streetscape Improvements, Union Square, City of Somerville TIGER Application

The City has shown leadership dating back many years in strategically addressing the infrastructure improvements needed in Union Square and Boynton Yards. Work that has been completed and is in progress includes:

- \$25M investment in Somerville Ave's sewer separation and streetscape reconstruction from Porter Square to Union Square was completed in 2010. Although the scope concluded at Union Square Plaza, the water and sewer separation along Somerville Ave East towards McGrath Hwy still needs to be completed and will be continued in Phase II of the infrastructure program.
- \$2.2M in design and engineering for traffic signal upgrades and minor sewer and water upgrades are underway. It is fully funded, in bidding, and will begin construction in the spring. Board of Aldermen bonded this \$2.2M in June 2015.

Not included in the \$100M estimate is approximately \$13M spent to date on site acquisition, relocation and remediation to address contamination on the former Kiley Barrel site (part of the D-2 parcel). One of the first projects undertaken by the Commonwealth's Brownfields Support Team, the \$2.1 million remediation of the Kiley Barrel site is near completion as a result of significant support by the Federal EPA and MassDevelopment.

- Massachusetts is part of the national movement toward removing antiquated highway overpasses, with a major project currently in construction in Jamaica Plain. MassDOT is in the middle of project development for taking down McGrath, and will move into the environmental review in 2016. This infrastructure improvement is projected for completion in 2025, but it has major implications for Union Square's infrastructure planning. It also has \$90 million programmed in the regional Long-Range Transportation Plan administered by the Boston Region MPO.

The City has also begun seeking outside sources of funding to assist in addressing the remaining infrastructure needs estimated at \$75M. Pending applications include:

- \$20M TIGER application for federal funds to assist with roadway and streetscape improvements to support connections to the new Green Line Station. The total cost of roadway and streetscape improvements included in the TIGER application is \$34M.
- \$16.34M MassWorks application to complete construction of Phase II of the Union Square Infrastructure Improvement Program, which includes water and sewer separation along Somerville Avenue-Central (\$13M) and streetscape and roadway improvements along Prospect Street between the future MBTA station and Union Square Plaza (\$3.34). Collectively, these projects will provide increased water and sewer capacity that supports D2 redevelopment and will enhance traffic flow, safety and aesthetics in the public realm.
- Additional programs being considered by the City of Somerville to support infrastructure development include TIFIA (Federal), I-Cubed (State), DIF (City), and any other value capture mechanisms that may be applicable. Somerville has experience working with value capture tools such as DIF and I-Cubed in other areas of development in Somerville such as Assembly Square. The financing program included a \$25 million DIF borrowing and a \$50 million I-cubed package.

References:

TIGER VII - 2015. (n.d.). Retrieved from City of Somerville: <http://somervillema.gov/tigervii>
US2. (n.d.). A Collaboration Shaping the Future of Union Square. Retrieved from US2: <http://www.us2unionsquare.info/#us2>

PUBLIC SPACES/ CIVIC BUILDINGS

PUBLIC SPACE

Gehl Studio, the U.S. based office of the internationally renowned design firm Gehl Architects, has been hired by the City of Somerville to advance its work toward creating 125 new acres of public open space city-wide. Gehl Studio will identify opportunities and techniques to create new public space and enrich public life across the city.

Gehl Architects was founded in 2007 by Danish architect Jan Gehl and Helle Søholt. The practice is based on design principles refined by Gehl and his wife Ingrid Mundt, a psychologist who has studied for over 40 years, the relationship between the built environment and people's quality of life. Gehl has pioneered a data-driven approach known as “Public Space-Public Life” research designed to provide recommendations on ways to improve the livability of a city or neighborhood by addressing the relationship between public spaces and how people use them.

In January 2014, the City partnered with the New England chapter of the Congress for the New Urbanism to provide a free screening of *The Human Scale*, a film featuring the work of Gehl Architects around the globe. The documentary explores what happens when we use a people-centered approach as the focus of city design and attracted a crowd of more than 900 people to the Somerville Theatre, one of the largest crowds to see the film at the time.

Gehl Studio is currently working on projects in over 10 cities ranging from San Francisco and New York to Lexington, KY, Charlotte, Miami, Philadelphia and now Somerville. Their unique approach has inspired hundreds of cities around the world based on decades of work in creating highly walkable streets, expanding and improving cycling infrastructure, and the reorganization of parks, squares, and other public spaces—work that has helped Copenhagen transform itself into the [world's happiest city](#).



In May 2015, City volunteers, including residents, students from local universities, design professionals and City staff conducted a field survey. Volunteers learned the various tools for measuring the quality of public space and public life alongside representatives from Gehl Studio.

References:

- Public Space - Public Life. (n.d.). Retrieved from Somerville by Design:
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- Save the Date: GEHL Studio in Somerville. (2015, Apr. 13). Retrieved from Somerville by Design:
<http://www.somervillebydesign.com/save-the-date-gehl-studio-in-somerville/>
- World-Renowned Firm Hired to Address Public Space Challenge. (2015, Mar. 25). Retrieved from City of Somerville: <http://www.somervillema.gov/news/world-renowned-firm-hired-address-public-space-challenge>

OPEN SPACE

In an April 8, 2015 presentation given to the CAC by other CAC members and local community stakeholders, the need to enhance open space as part of the Union Square redevelopment was highlighted. Specific examples were given including the fact that Union Square has less open space per capita (1.5 acres per 1,000 residents) than the City of Somerville average (1.7 acres per 1,000 residents). The City of Somerville was encouraged to enhance open space per capita to keep pace with abutting cities such as Cambridge (4.9 per 1,000) and Boston (8.3 per 1,000). The presentation points out that SomerVision sets a goal of 125 new acres of open space to be developed helping Somerville achieve 3.9 acres per 1,000 residents.

Using the boundaries set by the Somerville by Design Neighborhood Plan, there are a total of 397 acres of land in Union Square and 32 acres of land in Boynton Yards (collectively, 429 acres of land in the neighborhood plan area). This represents 16.25% of Somerville's total land area. It can reasonably be expected that redevelopment in Union Square include at least this proportion of the citywide goal for 125-acres of new publically accessible open space.

Finally the presentation acknowledged the challenge of creating large plots of open space in a dense, urban setting and provided examples of how other urban developments have created open space such as green rooftops, green alleys and pocket parks with a goal of creating an open space network rather than one large open space at the center of a development area.

The CAC has summarized the responses to the presentation on their website noting that some members would be willing to increase development height to increase the amount of open space in Union Square. Others were worried about the height and expressed concern for views and site lines within the Square being preserved.

References:

- Parsons, P., Talun, S., Foglia, G., Tate, A., Scott, R., Mancini, C., et al. (2015, Apr 18). Open Space, Green Space, Recreation Space: Issues, Opportunities, Challenges. Retrieved from <https://drive.google.com/file/d/0B6KGXDGQWL1bVFFxOHlzVFRHN2s/view>

SOMERVILLE BY DESIGN/COMMUNITY PARTICIPATION

PUBLIC MEETINGS – SOMERVILLE BY DESIGN

UNION SQUARE
#PlanUnionSquare

HOW DO YOU SEE THE FUTURE OF UNION SQUARE?

DECEMBER 17 Crowdsourcing Event Participate in a large-group brainstorming session. 6:30 PM	JANUARY 7 & 31 Visioning Sessions Share your hopes and concerns with the design team. January 7: 6:30 PM January 31: 9:00 AM Neighborhood Tour departing from Old Post Office, 10:00 AM Visioning Session	FEBRUARY 4, 11, 18, & 25 Development Opportunities & Constraints Workshops An opportunity to gain insight into key issues facing development. 6:30 PM	MARCH 9, 10, & 11 Design Charrette Watch as community input is transformed live into visions for the future. 9:00 AM to 8:00 PM daily	MAY 13 Plan Open House See a second round of ideas refined through the public process. 6:30 PM All events will be held at the Old Post Office located at 237 Washington St
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Somerville DESIGN
www.somervillebydesign.com

OFFICE OF STRATEGIC PLANNING & COMMUNITY DEVELOPMENT
Joseph A. Curtatone, Mayor

For generations, the typical system of urban planning utilized a “Decide-Present-Defend” public engagement model that sidelined local residents in participatory decision-making. Somerville by Design is different: it directly involves residents in urban design and economic development decisions facing their neighborhood, early on and in a meaningful way. The Somerville by Design model is best described as “**Outreach-Dialogue-Decide-Implement**”. This new method for planning acknowledges that the best results usually occur when informed residents collaborate with public officials to establish a vision for their neighborhood’s future.

That vision is created from the ground up, using a series of predictable and transparent steps:

- Participants identify existing strengths and weaknesses of the neighborhood
- Participants identify examples of future conditions that match their values
- The design team produces a wide variety of design possibilities reflecting participant input
- Designs are edited and critiqued by participants
- Unsatisfactory concepts are deleted based on participant feedback
- Additional rounds of participant review and critique are conducted until consensus is reached
- Final recommendations are described in a plan document and illustrated using high-quality imagery

'Somerville by Design' takes [SomerVision](#), the City's Comprehensive Master Plan, to the neighborhood scale. It continues the tradition of civic engagement, and connects it with best practices in planning and urban design that have emerged over the last fifteen years. Communities all over the world have learned that urban design is an effective basis for public dialogue, because people know and care how places look, feel, and function. New technologies are helping government to "crowd-source" the collection of valuable information and the production of creative ideas. By documenting these ideas in a visual format, the City and its partners can build and maintain public enthusiasm for projects and programs that are consistent with SomerVision's framework of conserving Somerville's great blocks of traditional housing, enhance our funky squares and main streets, and transform underutilized areas on the southern and eastern edges of the city into new complete neighborhoods.

Union Square has been the subject of numerous planning studies over the past 20 years, with mixed results and a range of implementation success. The Somerville by Design process for Union Square differs from past efforts in that there are immediate and identifiable outcomes. As the city is in the process of a zoning code upgrade, the green line expansion's associated station-area development will dovetail with this effort and result in tangible built results within the coming years. These opportunities include thousands of residents, business owners, community organizations, and property owners, to collaborate with City officials to prepare a plan that would essentially guide public and private investment in the Union Square neighborhood, from Central Street to the McGrath Highway, and from Prospect Hill to Boynton Yards.

There were many other opportunities for public participation throughout this process to discuss the future of Union Square. The City used Somerville by Design as an effort to provide updates on various projects within the City, including Union Square. The details of those meetings can be found [here](#).

References:

- Union Square Advisory Committee Announced. (2014, Jan 15). Retrieved from City of Somerville: <http://www.somervillema.gov/news/union-square-advisory-committee-announced>
- Union Square Civic Advisory Committee Community Portal. (n.d.). Retrieved from Union Square Civic Advisory Committee (CAC): <http://www.unionsquarefutures.org/>
- Union Square Civic Advisory Committee Expands. (2015, Mar 2015). Retrieved from City of Somerville: <http://www.somervillema.gov/news/union-square-civic-advisory-committee-expands>

CIVIC ADVISORY COMMITTEE (CAC)

The City of Somerville continues to emphasize the necessity for public participation in an open and transparent public process for all planning efforts. The same is true for the redevelopment of Union

Square. In January 2014, the Mayor appointed a 20-member [Civic Advisory Committee \(CAC\)](#) to advise the City on strategic planning decisions and development in the Union Square area, including areas such as economic development, land use, housing diversity, transportation, open space, quality of life, and preservation of the square’s character. All CAC meetings are open to the public, with time allocated for additional public participation. The CAC played an active role in the evaluation of the Master Developer candidates and will continue to serve as a public sounding board for master developer partner US2, while providing feedback and input that will shape the terms of a master land disposition agreement between the Somerville Redevelopment Authority and US2. In addition, the CAC will prioritize components of a community benefits agreement between US2 and the City, which may issues such as, but not limited to affordable housing, open space, job training and employment opportunities, support for local businesses, and financial support for needed infrastructure improvements. CAC membership has expanded over time and consists of 25 members that include local residents, business owners, and members of the Somerville Community Corporation, the Somerville Chamber of Commerce and the City’s maker movement. New members of the committee also represent Somerville’s clean energy economy, the City’s faith-based community, and members of neighborhood organizations including Union Square Neighbors and Union United. The CAC meetings are conducted 1-2 times a month and are open to the public. The CAC have conducted the following community meetings to date:

CAC Meetings to Date	
2014	2015
January 27, 2014	February 25, 2015
February 10, 2014	April 8, 2015
February 19, 2014	April 22, 2015
March 5, 2014	May 12, 2015
March 11, 2014	May 20, 2015
March 18, 2014	July 28, 2015
April 2, 2014	August 11, 2015
April 8, 2014	August 18, 2015
June 16, 2014	October 13, 2015
June 23, 2014	October 27, 2015
July 9, 2014	
September 10, 2014	
October 8, 2014	

The following is a list of community members currently on the CAC:

Name	Affiliation	Description	Member Since
Wig Zamore	CAC Co-chair	Resident and community advocate. MIT-trained urban development expert. A founding and active member of Mystic View Task Force and Somerville Transportation Equity Partnership (STEP) .	1/2014

Anne Tate	CAC Co-chair	Architect and Professor at <u>University of Rhode Island School of Design</u> .	1/2014
Joe Beckmann	Resident	Co-founder of <u>Progressive Democrats of Somerville</u> and <u>OutSomerville</u> . Beckmann is a former Somerville Public Schools consultant.	1/2014
Angelica Benatti	Local Business	Owner of <u>Master Printing & Signs</u> in Union Square. Member of <u>Union United</u> and native of Brazil.	2/2015
Jennifer Blundell	Resident	An experienced finance professional who has served in an advisory capacity to a number of institutions and corporations.	2/2015
Pokye Casserly	Local Business	Owner of <u>Reliable Market</u> in Union Square. Member of <u>Union United</u> and the <u>Somerville Chamber of Commerce</u> .	2/2015
Fr. Richard Curran	St. Joseph's Church	St. Joseph's Church. Member of <u>Union United</u> and active participant in past CAC meetings on issues affecting St. Joseph parishioners.	2/2015
Mike Dacey	<u>Fringe Union</u>	Founder of <u>Repeat Press</u> . Dacey is a representative of <u>Fringe Union</u>	1/2014
Eric Fellingner	Resident, <u>USMS</u>	Union Square Main Streets (USMS) President of Board of Directors. Fellingner is a transportation planner. Member of <u>USN</u> .	1/2014
Irma Flores	SomerViva, ESL Community	City of Somerville's Spanish language <u>SomerViva</u> liaison and school-based family and community liaison. Parent organizer for <u>Sociedad Latina</u> . Native of El Salvador.	2/2015
Esther Hanig	<u>USMS</u>	Executive Director of <u>Union Square Main Streets</u> .	2/2015
Scott Hayman	<u>SCC</u>	The <u>Somerville Community Corporation's (SCC)</u> Director of Housing	1/2014
Greg Jenkins	<u>Somerville Arts Council</u>	Executive Director of the <u>Somerville Arts Council</u> .	1/2014
Angelina Jockovich	Local Business	Co-owner of <u>Casa B</u> in Union Square. Jockovich is an architect by trade specializing in construction management, architectural design and sustainable design, and is a native of Colombia.	1/2014
Chris Mancini	<u>Groundwork Somerville</u>	Executive Director of <u>Groundwork Somerville</u> . Member of <u>Union United</u> , the steering committees of <u>Mystic River Watershed</u> and <u>Shape Up Somerville</u> , and the <u>Somerville Food Security Coalition</u> .	2/2015
Pat	Resident	Senior Consultant for <u>Public Consulting</u>	1/2014

McCormick		Group, former President of the <u>Somerville Homeless Coalition</u> board, and former CIO for the City of Somerville (2000-2004).	
Erik Neu	Resident	Graduate of the <u>Somerville Academy for Innovative Leadership (SAIL)</u> . A management consultant with experience with pharmaceutical and biotech companies, healthcare, and startups. Member of <u>USN</u> .	1/2014
Philip Parsons	Resident	Principal at Parsons Consulting Group. Formerly of <u>Sasaki Associates</u> , a leading international planning and design firm. Parson's specialties include comprehensive planning, urban design and planning, landscape architecture and LEED AP. Member of <u>USN</u> .	1/2014
Emily Reichert	<u>Greentown Labs</u>	Executive Director of <u>Greentown Labs</u> in Union Square. Experience with green tech, the maker movement and manufacturing	2/2015
Kat Rutkin	<u>Somerville Local First</u>	Executive Director of <u>Somerville Local First</u> . Courtney O'Keefe will represent Somerville Local First while Kat is on Maternity leave.	1/2014
Rebecca Schrumm	<u>Chamber of Commerce</u>	Somerville <u>Chamber of Commerce</u> Board of Directors Vice-Chairman and Green Committee Chairman. Schrumm is a financial advisor.	1/2014
Derek Seabury	<u>Artisan's Asylum</u>	President of <u>Artisan's Asylum</u> .	2/2015
Shu Talun	<u>USN</u>	Designer and project architect. Founding member of <u>Union Square Neighbors (USN)</u> . Native of Singapore	2/2015
Gordon Wong	Resident	Graduate of the <u>Somerville Academy for Innovative Leadership (SAIL)</u> . A data management specialist and Director of Business Intelligence at <u>Fitbit</u> .	1/2014

Update on their progress as well as further information on the CAC meetings can be found at their website, www.unionsquarefutures.org.

STAKEHOLDER PARTICIPATION

Many other community members and neighborhood groups have invested significant time and effort into participating in discussion about the future of Union Square. Though the list may not be

exhaustive, the following are a number of the other organizations that have played a role in the community process.

Organization	Website
Civic Advisory Committee	http://www.unionsquarefutures.org
Union Square Neighbors	http://www.unionsquareneighbors.com
Union United	http://www.unionunitedsomerville.com
Union Square Main Streets	http://www.unionsquaremain.org
Somerville Arts Council	http://www.somervilleartscouncil.org

PRINCIPLES OF DESIGN – UNION SQUARE NEIGHBORS & UNION SQUARE MAINSTREETS



Union Square Neighbors and [Union Square Main Streets](#) invited the community to share ideas that reimagine the Public Realm in Union Square, through a three-part series of neighborhood-organized discussions. In the report that came out of this process Principles of Design: Art, Green Space and the Public Realm, the participants outlined 9 principles around which they hope the public spaces in Union Square will be created:

1. Every element is an opportunity, do not default to typical standards but encourage inventiveness;
2. Create something memorable;
3. Put the “union” in Union Square;

4. Create an armature for public engagement
5. Connect the dots;
6. Create an environment of permissiveness;
7. Reward the wanderer;
8. Connect people to nature; and
9. Don't mess it up, emphasis should be placed on preserving and reinterpreting elements of the Union Square that exists today.

Union Square Neighbors developed a set of principles building upon the goals laid out in the SomerVision Neighborhood Plan and articulating the group's wishes, values and expectations for development to come. The group noted they expect their *Principles of Development* document to evolve and be updated as the group receives additional feedback over time. The following is an abbreviated version of the Principles of Development as stated by the Union Square Neighbors in January 2015. Please visit the link provided for the full document.

1. Sustainability as an overall design concept: Somerville has set a clear goal to be a net zero emissions city by 2050 – sustainable new development in Union Square will be critical in meeting this goal. Use sustainability goals which put climate as an overarching development driver -whether through managing district energy, water, transportation and housing - while creatively making city places which both strengthen the city and the immediate community with vibrant places to live and work, create and recreate, relax and restore.
2. Connectedness: Stitch the neighborhoods around Union Square together by establishing a robust pedestrian connectedness throughout Union Square. Improve connections across barriers such as railroad tracks, busy intersections, roadways and large blocks. Look for desire lines between and around the new T stop, surrounding neighborhoods, businesses and public spaces.
3. Housing Diversity: Create a varied types of well-designed residential settings - some to support families (with larger units and safe outdoor access); some to support artists and other home occupations with taller ceilings and flexible layouts; some to cater to older population that mixes in with all housing, some smaller units for less expensive living. Provide both rental and homeownership opportunities, and provide for a range of incomes that will help allow Union Square to maintain a diverse population over time.
4. Protect Neighborhood Edges: Repair and restore edges between commercial districts and residential neighborhoods where needed - this is a particularly important on the redevelopment blocks abutting existing neighborhoods. Create sensitive transitions in both use and scale and develop careful acoustic screening between commercial uses and residential edges.
5. Enhance the Public Realm: Create public spaces which provide: A variety of community experiences; places to meet and linger; Places for gathering and public activities; Places for performance - at different scales- intimate gatherings to large crowds; Green spaces -

areas of natural beauty that may also function as areas of cool shaded respite that might also be an area described above - for lingering, performance, etc.; 4 season use.

6. Create Outstanding Architecture: Create buildings of outstanding design and architectural quality that create variety in detail and texture. Be mindful of the longstanding pleasures of Union Square and environs - whether it is the magnificent views from the many locations around Prospect Hill, or the beautiful sunsets over the square, down Somerville Ave. Avoid development, which creates solid continuous unvaried walls of buildings, which don't allow permeability of movement or view, and cause a static experience of the square.
7. Great shade trees throughout: Large, broad shade trees cool the area and reduce the "urban heat island" effect. They shade pedestrians - thereby encouraging walking rather than driving, and provide a more convivial and comfortable public life.
8. Rebalance the public right of way: In most cities a very high percentage of the public right of way is devoted to automobiles - whether for travel lanes or parking. Plan to shift the proportion of the right of way for the different uses, so that walking and biking are made safer and more desirable, while more selectively accommodating automobiles.
9. Retail and local business: A critical aspect of the recent growth and popularity of Union Square is the nature of the business community - small, locally owned and conceived businesses. These businesses can form the backbone of a new Union Square. However, such businesses most often need early support and flexibility to establish themselves - and, after a time can become a resilient and diverse source of jobs, trade, ideas and overall pleasure - making Union Square more unique and desirable location to live, work and visit. Look to development plans which build in key elements of such a business as a dominant part of the retail street.
10. Create jobs in the community: Creating significant new commercial development is critical to meeting SomerVision's goal to create 30,000 new jobs in Somerville by 2030. It is important that commercial development occur in early phases of the redevelopment. For many in the Union Square neighborhood and nearby neighborhoods, jobs that provide good wages, benefits and future potential are more and more difficult to find, especially within a reasonable commuting distance. Commercial development is also critical to support the City's tax base. To encourage variety over time; Union Square Neighbors seek to have a variety of commercial and spatial types to develop a variety of commercial and business employment opportunities. Coupled with the arrival of those jobs, robust local hiring and training programs - both during and after construction - are anticipated. From the retailer's point of view, the daytime population of employees is also a critical component of a diverse retail base.

Civic Buildings

Union Square neighbors have expressed concern that the civic buildings in Union Square be part of the larger Union Square plan and that the City articulate its plans for these buildings. Union

Square neighbors want to maintain a civic presence in the square. This concern was outlined in a [letter](#) sent by the Union Square Neighbors to Mayor Curtatone on June 22, 2015.

References:

Principles of Design: Art, Green Space and the Public Realm. (n.d.). Retrieved from Union Square Neighbors: <http://www.unionsquareneighbors.com/principals-of-design-art-green-space-and-the-public-realm.html>

Union Square Neighbors. (2015, Jan). Retrieved from <https://docs.google.com/viewer?a=v&pid=sites&srcid=ZGVmYXVsdGRvbWFpbnx1c3FjYWN2MnxneDo0ZDc4YjUxZmFjNTQwZjFl>

SOMERVILLE COMMUNITY CORPORATION/UNION UNITED

Somerville Community Corporation - Union Square East

SCC worked with neighbors, Davis Square Architects, and Enterprise Community Partners on this community vision to create the Union Square East report. The report defines Union Square East as the neighborhood between Prospect, Medford, South, and Washington streets. SCC and their architectural partner Davis Square Architects set out to have three community workshops covering planning efforts in Union Square, a community visioning and mapping session, and a meeting to present back community designs to neighbors and having stakeholders help decide next steps.

SCC and its partners view this process as a comprehensive approach to involve SCC tenants and area residents in broader conversations about the future of Union Square.

With the arrival of the Green Line, Union Square redeveloping, and a neighborhood plan in the works, residents thought of ways to influence the changes that reflect their values and needs into neighborhood priorities. Those priorities are heavily dependent on creating affordable housing on the larger D-Blocks; new public plaza with parklets; maintaining civic functions; keeping Ricky's Flower Market in the square; make streets more pedestrian friendly; local bottom floor retail and residential above; create measurable performance metrics on affordable housing, local jobs, open space, etc. specific to Union Square; 5-story mixed-use to be considered around residential buildings to protect from shadowing and neighborhood scale; multi-purpose park; Linden and Allen street into one-way streets; expand and connect current community paths into Union Square; ensure traffic mitigation measures towards Union Square East in anticipation of the GLX; permeable surfaces and green roofs, etc.

Union United

According to their website, Union United describes itself as:

"A coalition of stakeholders, including small business owners, residents, activists, immigrant groups, religious congregations, labor unions, and community-based organizations, working to ensure that the Union Square redevelopment process results in tangible benefits — not displacement — for the Union Square community. We believe that we can have development

without displacement, but it requires the community to play an active role in the decision-making process, as our lives and livelihoods will be determined by the redevelopment's outcome. We believe the best way for local stakeholders to engage in the process is through a community benefits agreement”.

A community benefits agreement (CBA) is a legal contract between a community coalition and a developer. Our proposed CBA includes specific demands that will ensure affordable housing, local jobs, workers’ rights, small businesses, community resources, open space, arts and culture, public safety, and participatory planning are part of the redevelopment. If we have a seat at the table to ensure that these demands are met, all community members will be able to take advantage of the benefits that the Green Line will bring.

For too long, low-income people and immigrants have been displaced from our neighborhoods, while profit is prioritized over the needs of the community. We envision an equitable development that benefits everyone and keeps Union Square diverse, affordable, and accessible.”

There are currently 15 member groups associated with Union United:

- Union Square residents
- Union Square business owners
- CAAS
- Concord Ave Community Space
- Groundwork Somerville
- The Haitian Coalition
- Immigrant Service Providers Group/Health
- International Brotherhood of Electrical Workers Local 103
- Fr. Ademir Guerini, Pastor of St. Anthony’s Parish
- Fr. Richard Curran, Pastor of St. Joseph’s, St. Catherine’s, and St. Ann’s parishes
- Pra. Leide Miculic, Pastor of Last Hour Ministry Casa de Oraçã
- SEIU Local 888
- SCATV
- Somerville Community Corporation
- Somerville Homeless Coalition
- Somerville Labor Coalition
- Teen Empowerment
- The Welcome Project

Through significant research and preparation, Union United has developed a set of priorities to include in a CBA. Those priorities include but not limited to some or all of the following: (1) significant new affordable housing opportunities; (2) jobs for local residents and worker rights; (3) art and culture; (4) small business protection and opportunity; (5) green design, environment and open space; (6) public safety; (7) impact studies; and (8) community participation.

References:

(n.d.). Retrieved from Union United: <http://unionunitedsomerville.com>

Union Square East: Creating a Community Roadmap. (n.d.). Retrieved from Somerville Community Corporation : http://somervillecdc.org/sites/default/files/scc-minimal/files/enterprise_community_workshop_final_report.pdf

SOCIAL EQUITY

Many of Somerville's residents and businesses have raised concerns regarding social equity and displacement that may be caused from the redevelopment of Union Square. The City of Somerville created the Sustainable Neighborhoods Initiative (SNI) in October 2014 in efforts to analyze, assess, and recommend approaches to support and preserve affordable housing in Somerville. These concerns have also been addressed by several Massachusetts organizations that work with communities to address social equity issues such as affordable housing, open space and business retention.

SUSTAINABLE NEIGHBORHOODS WORKING GROUP (SNWG)

Somerville's Sustainable Neighborhoods Working Group (SNWG) initiated work in February 2015, following its appointment in January 2015 by Mayor Curtatone in response to expressions of interest solicited in November 2014. SNWG's formation was one of the first follow-up items from Mayor Curtatone's announcement of his Sustainable Neighborhoods Initiative (SNI) in October 2014.

SNWG's work is part of Mayor Curtatone's effort to broaden and deepen the City's already robust work to maintain affordability for Somerville residents, by addressing affordable housing issues in a comprehensive manner through a community working group recommendation process. Since February SNWG members and the group's three working committee have been exploring resource issues, policies, and programs to help address affordability concerns across the income spectrum.

SNWG's 27 members bring a wide range of expertise and perspectives to bear in identifying recommend bold and innovative ways to address affordable housing concerns, as part of the SNI. The group includes experts in the field of housing, resident stakeholders, community advocates, and finance and real estate industry professionals, who working with the support of Housing and Planning personnel. Alderman Mark Niedergang, Chairman of the Housing and Community Development Committee, and former Housing Director Dana LeWinter, have served as co-chairs.

While meeting monthly as a full working group, members also joined one of three issue-focused committees. These committees have considered into ideas related to respective focus areas – resources, programs, or policies – and have met separately once or twice a month. As of September, 21, 2015, the full working group has met 8 times, the Resources Committee meeting 6 times, Programs Committee meeting 10 times, and Policies Committee 7 times over an 8-month period – for a total of 31 public meetings to date. The group is tasked with developing approaches that expand City resources devoted to maintaining affordability, that protect and preserve existing affordable housing, and that contribute to the production of new affordable units. Additionally, the SNWG has looked to broaden city efforts to include middle-income housing for working families.

The six initial core components of SNI include the 100 Homes initiative, comprehensive zoning reform, a benevolent property owner tax credit, a local transfer tax, an affordable housing design competition, and updating the housing production goal in the city's comprehensive plan.

In addition to these six original initiatives, the working group is also considering other potential initiatives, including: financial support program for income eligible homeowners facing foreclosure, a program to provide loans for home energy efficiency improvements in exchange for affordable rents covenants, a financial support program for tenants in inclusionary rental units, community land trusts, a short term rental tax, an adjustment of the affordable housing linkage fee, a right of first refusal program, and amendments to the condo conversion ordinance. The working group has also reviewed universal waitlists policies, alternate homeownership models, Chapter 40R Smart Growth Zoning Overlays, and District Improvement Financing affordable housing set-aside policies, and expects to issue recommendations on some, if not all, of these areas in November 2015.

References:

City of Somerville. (2014, Oct 15). City Launch Affordable Housing Program. Retrieved from City of Somerville: <http://www.somervillema.gov/news/city-launch-affordable-housing-program>

Metropolitan Area Planning Commission (MAPC)

The Metropolitan Area Planning Commission (MAPC) issued the Dimensions of Displacement, Baseline Date for Managing Neighborhood Change in Somerville's Green Line Corridor in February 2014.

The Executive Summary states: The Metropolitan Area Planning Council (MAPC) prepared this analysis in partnership with the City of Somerville, Somerville Community Corporation, Somerville Transportation Equity Partnership, Friends of the Community Path, and Massachusetts Smart Growth Alliance to illuminate the magnitude of displacement risk associated with the Green Line extension (GLX) in order to help focus action on the strategies with the best potential to mitigate that risk. The report first provides a baseline analysis establishing the current demographic and residential context into which the GLX is being introduced. The report then focuses on four mechanisms by which displacement can occur, and estimates the magnitude of displacement potential from each based on development patterns in comparable neighborhoods.

The analysis suggests that higher rental costs and a shift from rental properties to condominiums will occur in the GLX corridor over the next ten to fifteen years. Interventions to mitigate the impacts of those changes on vulnerable populations are likely to have the greatest impact before the GLX is completed, and therefore must remain a primary focus for the next five years or more.

Key Findings from the Dimensions of Displacement, Baseline Date for Managing Neighborhood Change in Somerville's Green Line Corridor report

- Increased overall housing production is critical to maintaining Somerville's affordability. MAPC's population and housing demand projections anticipate demand for at least 6,300

housing units in the City of Somerville from 2010 to 2030, and as many as 9,000 units over the same period. Of this demand, about 35% of new units will be needed for low-income households, and the balance will be market-rate. If production lags substantially behind demand, prices may rise even more dramatically than they have over the past ten years, with the greatest pressure felt by low-and-moderate income households.

- Increases in residential rents near new transit stations pose the greatest risk of displacement. Transit-induced rent increases are projected to be highest around Ball Square, College Avenue, Route 16, Union Square, and Washington Street, where monthly rents could increase more than 25% and as much as 67%. Overall, we expect that 700 to 800 lower-income renter households will be forced to dedicate over 30% of their income to housing costs, and conditions will worsen for the 3,600 lower-income renters in the GLX corridor who are already housing cost-burdened.
- Condominium conversion presents substantial risk of displacement in some station areas, but less so in others. Conversion of single-owner two- and three-family homes to condominiums may impact as many as 475 renter households currently occupying those structures, with the greatest number of at-risk units in the Gilman Square, Washington Street, and Union Square station areas.
- Nearly one twelfth of the city's designated affordable housing units are at risk of losing their affordability restrictions by 2020. In the City of Somerville, there are 272 subsidized rental apartments that could be converted to market-rate housing before 2020, 8.4% of the city's total stock of designated affordable units. Unfortunately, nearly all of these units with expiring affordability restrictions are in GLX station areas where they will face great pressure for conversion to market rents. If real estate conditions heat up significantly with GLX construction, the prospect of converting expiring units to market rate will be even more enticing to owners.
- Windfall increases in residential property values are likely to have a limited impact on tax bills or municipal tax receipts. Average property values within walking distance of new T stations may increase 16% to 25% following the introduction of transit. It is possible that affected owners could see increases in their annual property tax bill in the range of \$540 to \$870, equivalent to less than 2% of the annual income for most of the 2,000 lower-income homeowners in Somerville. However, state law limits the annual increase in the city's total tax levy, and new commercial development following the introduction of transit may help to stabilize the tax base. Both factors will help determine the ultimate change in tax rates and revenue.
- Somerville's highly mobile and increasingly diverse population could change rapidly even without displacement. One in six Somerville residents moved to the city within the past year, and through this turnover the city continues to become more racially and ethnically diverse. If the characteristics of those newcomers change substantially, they could swiftly change the face of the city even if outmigration remains unchanged. Increased housing displacement would make that demographic transformation even more rapid.

MAPC's work on displacement includes recommendations for mitigation measures to help alleviate the impact of the Green Line Extension on the existing residents and businesses. MAPC's mitigation recommendations can be found in [Chapter 5](#) of the Mystic Valley Parkway Community Visioning Process final report.

MAPC has also worked with the City of Somerville to analyze the City's future housing needs and made presentations to the Sustainable Neighborhoods Working Group with data and analysis on housing demand projections and demographic changes in Somerville. MAPC hosted a Housing Forum and the following documents lay out the theses and recommendations developed at the forum focused on addressing housing displacement as the redevelopment of Union Square moves forward.

- [Themes](#)
- [Solutions and Strategies](#)

References:

Reardon, T., Martin, C., & Partridge, J. (2014). The Dimensions of Displacement Baseline Data for Managing Neighborhood Change in Somerville's Green Line Corridor. Metropolitan Area Planning Council. Metropolitan Area Planning Council.

Massachusetts Smart Growth Alliance

The Massachusetts Smart Growth Alliance launched its "Great Neighborhoods" program in 2010, with Somerville as one of five initial flagship communities. The initiative is based on the belief that changing the way people work together can positively transform communities—and make our region more prosperous, welcoming, and resilient to challenges like climate change. The Barr Foundation and the Ford Foundation provide resources for this program, MAPC's Sustainable Communities grant from HUD, and local organizations and volunteers.

In Somerville, Great Neighborhoods is supporting the work of the Community Corridor Planning Coalition (CCP) to take advantage of the opportunities for transformation offered by upcoming transit investments. The CCP will work with the City of Somerville and community members around station area planning for the Green Line Extension and Assembly Square that encompasses the creation and preservation of affordable housing, jobs for local residents and open space.

Local strategic partners include the City of Somerville, Somerville Community Corporation, Groundwork Somerville, Somerville Transportation Equity Partnership (STEP), and Friends of the Community Path. The City of Somerville, East Somerville Main Streets, and other groups participated in key projects as well.

The following are some of the most significant achievements of the Great Neighborhoods-supported work over the last few years:

- Created a precedent-setting MBTA work program called the Massachusetts Workforce Initiative Now (WIN), which is a collaboration between the cities of Cambridge, Somerville and Medford, contractor White, Skanska & Kiewit, Bunker Hill Community College and multiple community groups to identify and train workers for careers in transportation through partnerships with existing technical schools, industry training programs and community organizations, as well as an Access and Opportunities Committee to monitor and oversee progress on WIN.
- Collaborating with the City, and with STEP in the lead, to support funding and strong multi-modal design for the Green Line Extension.
- Passed Community Preservation Act with unprecedented 76% support, with Mayor Curtatone as Campaign Chair and Meredith Levy from SCC as Campaign Manager.
- Launched First Source, a community work placement program connecting local residents to jobs.
- Working with Mayor to increase the linkage fee from \$3.91/sq. ft. to \$5.15/sq. ft., and inclusionary zoning requirements to 20% with stronger provisions for 2- and 3-bedroom units.
- Built a housing coalition called “Everyone’s Somerville” and obtained permits for affordable Transit-Oriented Development (TOD) in Union Square, partnering with a private market-rate developer along the way.
- Secured design and funding commitment for Mass DOT to build the Community Path with the Green Line, with Friends of the Community Path taking the lead.
- Influenced the City’s master plan called SomerVision, including goals calling for 6,000 new housing units (1,200 of them permanently affordable), 30,000 new jobs, 50% of new trips to be walking, biking or transit, and 125 acres of new green space. All members of the Somerville Great Neighborhoods initiative were active in SomerVision.
- MAPC’s work with local groups on gentrification and displacement helped contribute to the City’s “Sustainable Neighborhoods” Plan as a first step to addressing rising rents and home prices.
- Hosted a “placemaking” workshop with Project for Public Spaces and East Somerville Main Streets that helped spur winning a National Endowment for the Arts “Our Town” grant establishing an East Broadway Cultural District as well as a state MassWorks award for East Broadway streetscape improvements.

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INDUSTRY RESEARCH

CITY-WIDE STATISTICS

Demographics

- Total population of 78,901 in 2014
- 44% of residents between 20-34 years old

Housing

- 32,743 housing units
- 3,341 total number of affordable housing units
- 38.7% of families spend more than 30% of their annual income on housing costs
- 65.5% of units have 2 bedrooms or fewer
- 60.6% of homes are located in 2 and 3 unit buildings
- 66.3% of homes are located in buildings constructed before 1940
- 95% of homes are located within a 5 minute walk of commercial uses
- \$15 million has been invested by the City of Somerville in affordable housing since 2000
- Average 2 bedroom rent in Somerville is \$2,567
- Average 2 bedroom condo in Somerville is \$543,417
- From 2010-2014 there were 973 total housing units built – 696 Market rate, 277 affordable.
- 55% of owner-occupied households are below 110% AMI in Somerville as a whole

Business/Jobs

- 20,000 jobs in Somerville in 2010
- 85% of Somerville residents work outside of Somerville
- 25% of Somerville's tax base comes from commercial property
- 1,800 business are located in Somerville
- 1,700 small businesses with fewer than 5 employees
- Approximately 800,000 square feet of office space

Open Space

- 180 acres of publicly accessible open space
- 2 miles of waterfront along the Mystic River and Alewife Brook
- 11,500 trees on Somerville streets and in public parks

Education

- 4,500 students in Somerville Public Schools
- 54% of residents with college degree or higher

Transit

- 30,000 private vehicles registered in Somerville
- 35 miles of bicycle routes
- 25% of Somerville's land area is taken by roads
- 30% of Somerville commuters use mass transit

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- City of Somerville. (2012, Apr.). Somervision: Comp Plan 2010-2030. Retrieved from City of Somerville: <http://www.somervillema.gov/spotlights/comp-plan>
- US2. (2015, Feb. 11). Somerville by Design. Retrieved from Create an Employment Center in Union Square: Union Square Workshop #2: <http://www.somervillebydesign.com/wp-content/uploads/2015/04/US2-Development-Workshop-Real-Estate-Markets-Presentation-20150211.pdf>

Union Square Statistics

Eastern Somerville used as geographic area for data:

- Located 2 miles north of downtown Boston and one mile from Kendall Square
- Population (which includes Union Square) 12,503
- 30.3% minority
- 32.4% foreign born
- Estimated 57,679 people living within one mile of Union Square
- 3 million jobs located within a 3 mile radius
- Average household income \$58,712
- 21.6% of Union Square residents fall below the poverty line
- Unemployment 2.6%
- 29.6% are homeowners
- Since July 2009 there have been permits pulled for 235 housing units in Union Square.
 - Average 2 bedroom rent in Union Square it is \$2,715
 - Average 2 bedroom condo in Union Square it is \$520,988
- Jobs within Somerville are overwhelmingly retail and service oriented
- Designated as a Neighborhood Revitalization Strategy Area (NRSA) by HUD and an Urban Renewal Area by the State of MA allowing the City to direct valuable resources into the redevelopment of this area.

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- US2. (2015, Feb. 11). Somerville by Design. Retrieved from Create an Employment Center in Union Square: Union Square Workshop #2: <http://www.somervillebydesign.com/wp-content/uploads/2015/04/US2-Development-Workshop-Real-Estate-Markets-Presentation-20150211.pdf>
- 2013 American Community Survey - Data collection from Census tracts 351204,350104,350103,351403,351404,351203.

NEWS COVERAGE OF UNION SQUARE

Following is a list of some notable news coverage of Union Square but is not intended to be a comprehensive list:

- [“Getting Up to Speed on Somerville’s Union Square Redevelopment Process,”](#) BostInno, July 28, 2015
- [“Somerville-hired consultant to CAC: Start working on Union Square CBA now,”](#) Somerville Journal, July 30, 2015
- [“Workbar to open up a new location in Union Square,”](#) Boston Globe’s Beta Boston, June 15, 2015
- [“Somerville Inks Finalized Agreement with Union Square Developer,”](#) BostInno, December 9, 2014
- [“The City Where Real Estate Developers and Housing Activists Agree to Agree,”](#) Next City, November 3, 2014
- [“In Somerville, Shuttered Factory Now a Hub of Innovation,”](#) Boston Globe, August 31, 2014
- [“Does New Mass Transit Always Have to Mean Rapidly Rising Rents?”](#) The Atlantic CityLab, May 13, 2014
- [“Gentrification vs. Growth in Union Square,”](#) Boston Globe, March 4, 2014
- [“A Game-Changer for Somerville,”](#) Boston Globe, December 6, 2014

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