



**WP1**     
**CASE STUDY**  
**SURVEY FORMS 2012**  
CLUDs PROJECT

# Economic Development Strategies

## The Role of Public Private Partnership





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – *Northeastern University* of Boston (MA)

**Case Study:** Dudley Street Neighborhood Initiative

**Researcher:** Enzo Falco

## Survey Form

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## 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

### 1.1 General Information

<b>Zoning Code</b> Source: <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a>	Article 50. Roxbury Neighborhood District – Map 6A/6B/6C.	
<b>Topical areas</b>	<input type="checkbox"/> Partnership agreement <input type="checkbox"/> Community Development <input type="checkbox"/> Urban Agricultural Linkages <input type="checkbox"/> Social Enterprise <input type="checkbox"/> University-focused <input checked="" type="checkbox"/> Non-profit assistance/development <input type="checkbox"/> Business incubators	
<b>Location</b>	<i>Neighbourhood</i> Roxbury	
	<i>ZIP Code</i> 02119	
	<i>City</i> Boston	
	<i>County</i> Suffolk	
	<i>State</i> Massachusetts	
<b>Start-up</b> Source: DSNi.org	<i>Year</i> 1984	
<b>Years in operation</b> Source: DSNi.org	<i>Year</i> 28	
<b>Number of renewals</b> Source: DSNi.org	<i>1 renewal in</i> 1996	
<b>Dimension</b> Source: U.S. Census Bureau	<i>Area (sq. Km)</i> 5.5	
	<i>Residents (2010)</i> 34,476	
<b>Partnership Institutional Typology</b> Source: Interview	<i>Typology</i> <input type="checkbox"/> BID: Business Improvement District <input type="checkbox"/> PA: Public Agency <input type="checkbox"/> CDC: Community Development Corporations <input type="checkbox"/> SE: Social Enterprise <input type="checkbox"/> NPOMS: Non-profit organization for implementing the Main Street initiative <input checked="" type="checkbox"/> NPCBPO: Non-profit Community-Based Planning Organization other than CDC, SE, MS <input type="checkbox"/> TOD <input type="checkbox"/> Other (Specify)	<i>Reference by law</i>       IRC Section 501 C (3)



Partnership composition	Name	Public/Private/NGO	% Initial Capital Invested
Source: DSNi.org	<b>Board Members</b>		Information on initial capital invested is not available by single funder. In the year July 2008-June 2009 the total public support was equal to the 96.80% of the whole budget.
	<p>Residents</p> <p><i>Community agencies</i></p> <p>Bird St. Community Center</p> <p>Cape Verdan Community UNIDO</p> <p>Dorchester Bay EDC</p> <p>La Alianza Hispana</p> <p>Project Hope</p> <p>Vine St. Community Center</p> <p>W.A.I.T.T. House</p> <p><i>Religious Organizations</i></p> <p>Boston Missionary Baptist Church</p> <p>St. Patrick's Church</p> <p><i>Small Business</i></p> <p>Fidalgo Travel</p> <p>Ideal Sub Shop</p> <p><b>Major Partners and Collaborators</b></p> <p><i>Private subjects</i></p> <p>Action for Boston Community Development Inc (ABCD)</p> <p>Harvard University, Graduate School of Education</p> <p>Boston Private Industry Council</p> <p>BestBuy</p> <p>Boston Private Industry Council (PIC)</p> <p>The Food Project</p> <p>Tufts University</p> <p>Urban Edge Housing Corporation</p> <p>University of Massachusetts, Boston – College of Public and Comm. Service</p> <p>University of Massachusetts, Boston - Center for Community Democracy &amp; Democratic Literacy</p> <p><i>Public Institutions</i></p> <p>Boston Arts Academy</p> <p>Boston Police Department</p> <p>Boston Housing Authority</p> <p>Boston Public Health Commission</p> <p>Boston Public Schools</p> <p>Boston Redevelopment Authority</p> <p>City of Boston</p>		



	United States Department of Education Family Nurturing Center of Massachusetts Massachusetts Department of Housing and Community Development Mass 2020 Roxbury Neighbourhood Council		
Number of board directors <i>Source: DSNi.org</i>	34		

## 1.2 Abstract of the initiative

Sources: Medoff and Sklar (1994); DSNi.org; Interview.

### ***The case study in brief (What is the case study, max 15 rows)***

The Dudley Street Neighborhood Initiative (DSNI) is a nonprofit community-based planning and organizing entity rooted in the Roxbury/North Dorchester neighborhoods of Boston. DSNI's approach to neighborhood social and economic revitalisation is comprehensive including economic, human, physical, and environmental growth. It was formed in 1984 when residents of the Dudley Street area came together to claim back their neighborhood that was devastated by arson and disinvestment and protect it from outside speculators and illegal dumping (DSNI.org). DSNI works to implement resident-driven plans in collaboration with various and different community development corporations (CDCs) which serve the area as well as businesses and religious institutions, nonprofit organizations, banks and government agencies.

DSNI is a community initiative which has involved during its 28 years of activity over 3,000 residents throughout the neighbourhood. DSNI is the only community-based nonprofit in the country which has been granted eminent domain authority over abandoned privately owned land plots within its boundaries. Through such a power important objectives have been achieved during the years such as building of rental affordable housing and affordable home-ownership schemes. The objective was to fill the great amount of vacant land which characterised the neighbourhood and to retain new residents once they settled in the area. This last objective has been achieved through the constitution of Dudley Neighbours Inc. Land Trust which has pre-emption right over housing schemes and through agreements with new owners to not sell their property for a certain amount of time.

### ***The Challenge (Why the case worth discussing, max 5 rows)***

The case study is one of the most interesting cases of nonprofit neighborhood based organizations in the whole US. Nation-famous organization, DSNI endeavors in community planning and organizing since 1984. Its efforts over the years have been considerable and generally aim to empower local residents and improve their quality of life. DSNI is involved in a series of projects ranging from affordable housing provisions to workforce initiatives, job creation and youth involvement.

### ***The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)***

Dudley Street neighbourhood is located about two miles south of downtown Boston in Roxbury/North Dorchester Neighbourhoods. The Dudley Street neighborhood is a remarkable reservoir of multi-language, multicultural communities. Known as the "other downtown" long ago in the period between the two World Wars, it has experienced a process of decay, disinvestment and discrimination since the 1960s.

The Dudley area is one of the poorest in Boston. This diverse community of African American, Cape Verdean (Over 50%), Latino (26%), Asian (18%) and White (4%) residents has a per capita income of \$ 17,012; just half of the city's per-capita income (\$ 31,856). Over 30% of the area's population is classified below the poverty level, compared to the 20% value of the city. The unemployment rate for the neighborhood is around 20% and just over a quarter (26%) of the housing is owner-occupied as compared to the city's average of 32%.

### ***The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)***

Though DSNI has a clear vision, its strategy to empower local residents and achieve the vision itself is not defined as well. Dudley Neighbours Inc. (DNI) Land Trust, a sub-organisation of DSNI, plays a fundamental role in the achievement of the vision, especially through affordable housing targets and vacant land development. As a Land Trust, DNI gained eminent domain authority in 1988 and has ever since played a crucial role within the Triangle portion of the Dudley Neighbourhood in proposing and getting approved new development. An important feature which distinguishes DSNI from more common Community Development Corporations is the fact that DSNI does not carry out new development itself. In such a way there is no direct economic interest within their initiatives and DSNI is able to pursue the general good and public interest better than any other CDC with self economic interests.



### **1.3 Map**

*Source: Elaborated on the basis of the Boston Redevelopment Authority "My Neighbourhoods" Maps*

## 1.4 Budget size

Source: IRS Form 990

	2009	2008	2007	2006	2003	2002	2001
Expenditure	712,206	573,718	553,754	471,846	771,940	999,298	1,292,541
Revenue	850,200	576,167	512,961	448,341	562,913	985,900	651,913
Total Budget	576,672	303,133	257,442	315,523	5,861	410,338	-203,779
Of which: Asset	438,678	300,684	298,235	339,028	214,888	423,736	436,849

## 1.5 Vacancy rate

Source: U.S. Census Bureau; Interview

Vacancy	% 2000	% 2010	Percentage of change from 2000	Percentage of change from the starting point (1984)
Vacant commercial property (sqm or units)	-	-	-	-
Vacant housing property (sqm or units)	1,147 (10%)	1,272 units (9.5%)	-0.5 %	N/A
Vacant land (sqm or units)	-	137,593 sqm (53%)	-	-47%

## 1.6 Strategic Priorities

Source: Interview; DSNi.org

Priorities	Description
<input type="checkbox"/> Retail Enhancement	-
<input checked="" type="checkbox"/> Economic Revitalization	Revitalise the economic structure of the neighbourhood by reducing the unemployment rate by means of diverse job creation initiatives.
<input type="checkbox"/> Security and Safety	-
<input type="checkbox"/> Building Restoration/Renewal	-
<input type="checkbox"/> Innovation/Green Technologies	-
<input checked="" type="checkbox"/> Education and Training	Different education and training programmes are provided by organisations jointly with DSNi. The role of DSNi is more an organisation role to set up programmes and initiatives which are provided by other subjects.
<input checked="" type="checkbox"/> Job Creation/Social works	Job Creation is achieved by means of job fairs which are organised annually with local businesses and through collaboration with the FOOD PROJECT which organises summer and all-year-round jobs for youths.
<input type="checkbox"/> Technology Transfer	-
<input type="checkbox"/> Capacity Building	-
<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	DSNi with its Land Trust (Dudley Neighbours Inc.) has managed the building process of different affordable home-ownership and rental schemes. DSNi is none of the cases is the developer. It works in collaboration with different developers.
<input type="checkbox"/> Local produce valorisation	-

<input checked="" type="checkbox"/> Cultural enrichment	Retaining the diverse cultural community within the neighbourhood is part of the strategy that DSNi puts in place.
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity	-

### 1.7 Private sector involvement

Source:

All Business enterprises are associated: ☐ if not indicate the % \_\_0  
All merchants are associated: ☐ if not indicate the % \_\_0  
Other private entities (non profit) ☐ if not indicate the % \_\_0

### 1.8 Public investment programs

Source: Interview

Policy focus for public investment program	Description
Tax policy focus	Federal Taxes exemption under Section 501 C of the Internal Revenue Code
Fiscal policy focus	-
Economic development organizations	-
University focus	-
Recruitment	-
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	-
Credit Access	-
Local Welfare Policy	-
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	Eminent Domain Authority



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

*Please, refer to Annex 1*

**2.1 Demographic data**

**2.2 Labour Market**

**2.3 Production**



### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditure

Source: IRS Form 990

Items	Expenditure (\$)		Total 2002 (most relevant year)	Total 2009 (last available year)
	Public	Private		
General & administrative	N.A.	N.A.	474,933	331,072
Social services	N.A.	N.A.	-	-
Capital improvements	N.A.	N.A.	-	-
Streetscape/sidewalk maintenance and repair	N.A.	N.A.	-	-
Graffiti removal	N.A.	N.A.	-	-
Beautification & Horticulture	N.A.	N.A.	-	-
Holiday lighting	N.A.	N.A.	-	-
Sanitation	N.A.	N.A.	-	-
Security	N.A.	N.A.	-	-
Marketing, communication special events and tourism	N.A.	N.A.	-	-
Education	N.A.	N.A.	-	-
Grant and allocations to other organizations	N.A.	N.A.	45,471	-
Job creation initiative	N.A.	N.A.	-	-
Resident initiative	N.A.	N.A.	-	-
Occupancy	N.A.	N.A.	24,618	70,735
Payroll taxes	N.A.	N.A.	116,068	28,629
Office expenses	N.A.	N.A.	-	48,668
Accounting	N.A.	N.A.	68,225	18,789
Information Technology	N.A.	N.A.	-	1,080
Program Cost	N.A.	N.A.	-	82,705
Bad Debt Expense & Penalties	N.A.	N.A.	184,657	45,128
Travel, Conferences and Conventions	N.A.	N.A.	23,110	1,724
Interest	N.A.	N.A.	3,221	4,392
Depreciation, depletion and amortization	N.A.	N.A.	20,188	19,247
Insurance	N.A.	N.A.	-	7,842
Other	N.A.	N.A.	38,807	52,195
<b>Total</b>	N.A.	N.A.	<b>999,298</b>	<b>712,206</b>

### 3.2 Source of revenue

Source: IRS Form 990

Items	revenue (\$)		Total 2002 (most relevant year)	Total 2009 (last available year)
	Public	Private		
Program service revenue	N.A	N.A	-	83,701
Special contracts	N.A	N.A	-	-
Investment income	N.A	N.A	-	-
Fundraising & special events	N.A	N.A	-	-
Government Grants	N.A	N.A	-	-
Private contributions (auto-taxation)	N.A	N.A	-	-
Interest	N.A	N.A	-	-
Assessment (fee or levy)	N.A	N.A	-	-
Rental income	N.A	N.A	-	-
Other	N.A	N.A	985,900	766,499
<i>Total</i>	N.A	N.A	985,900	850,200

#### 4 IV SECTION: MARKETING AND PROMOTION

##### 4.1 Business attraction, creation, retention and assistance programs

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	-	-	-	-
Creation of new business (start-ups)	-	-	-	-
Retention of business	-	-	-	-
Assistance weak business	-	-	-	-

##### 4.2 Services and improvements

Source: DSNi Financial Report 2009

Programs	Description	Item	Financial sources		
			Public	Private	Total
✓ Retail Enhancement	Retail enhancement within the Dudley Village development.	743 square metres of Commercial Space	N.A	N.A	-
<input type="checkbox"/> Economic Revitalization	-	-	N.A	N.A	-
<input type="checkbox"/> Security and Safety	-	-	N.A	N.A	-
<input type="checkbox"/> Building Restoration/Renewal	-	-	N.A	N.A	-
<input type="checkbox"/> Innovation/Green Technologies	-	-	N.A	N.A	-
✓ Education and Training	Community tours program provided 30 trainings, tours and talks. Hosted local, national, international visitors.	-	N.A	N.A	62,489
✓ Job Creation/Social works	Annual Job fair. 300 youth and 24 worksites participated.	-	N.A	N.A	226,650
<input type="checkbox"/> Technology Transfer	-	-	N.A	N.A	-
<input type="checkbox"/> Capacity Building	-	-	N.A	N.A	-
✓ Local services/provisions (housing, leisure, etc.)	50 units of affordable housing and retail space in partnership with Dorchester Bat EDC.	Dudley Village North and South	N.A	N.A	186,760
✓ Local produce valorisation	Community Greenhouse managed by the community which hosts different kind of initiatives for youth and residents.	1,000 square metres of Community Greenhouse	N.A	N.A	1,524,900
<input type="checkbox"/> Cultural enrichment	-	-	N.A	N.A	-
✓ Natural Beauty, Green Space and biodiversity	New open spaces have been created over time by DSNi in collaborations with the community and other subjects.	Lewis Place Orchard; Dennis/Huckins Street Garden	N.A	N.A	-
<input type="checkbox"/> Other	-	-	N.A	N.A	-

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations (not partners)

Source: DSNI Annual Report 2010-2011; Interview

Name	Typology (size)	Level of influence (with respect to the size of the organization)
Action for Boston Community Development Inc (ABCD)	Private Company	Low
BestBuy	Private Company	Low
Boston Private Industry Council (PIC)	Private Company	Low
Harvard University, Graduate School of Education	Private Company	Low
The Food Project	Private Company	Low
Tufts University	Private Company	Low
Urban Edge Housing Corporation	Private Company	Low
University of Massachusetts, Boston - College of Public and Comm. Service	Private Company	Low
University of Massachusetts, Boston - Center for Community Democracy & Democratic Literacy	Private Company	Low
Boston Arts Academy	Private Company	Low
Boston Police Department	Public Institution	Low
Boston Housing Authority	Public Institution	Medium
Boston Public Health Commission	Public Institution	Low
Boston Public Schools	Public Institution	Medium
Boston Redevelopment Authority	Public Institution	Low
City of Boston	Public Institution	High
Family Nurturing Center of Massachusetts	Public Institution	Low
Massachusetts Department of Housing and Community Development	Public Institution	Medium
Mass 2020	Public Institution	Low
Roxbury Neighbourhood Council	Public Institution	High
United States Department of Education	Public Institution	Medium

## 5.2 Local elected official and community board members

*"Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for."*

Source:DSNI Annual Report 2010-2011

Name	Elected/member	Political role
Jolivia Barros	Elected	Resident
Keila Barros	Elected	Resident
Simoa Barros	Elected	Resident
Paul Bothwell	Elected	Resident
Phaedra Bruton	Elected	Resident
Belinda Cardoso	Elected	Resident
Evelyn Correa	Elected	Resident
Diane Dujon	Elected	Resident
Catherine Flannery	Elected	Resident
Rosa Galvao	Elected	Resident
Theresa Glynn	Elected	Resident
Erika Guerra	Elected	Resident
Carlos Henriquez	Elected	Resident
Mayari Hernandez	Elected	Resident
Alexandra Knowles	Elected	Resident
Glenn Knowles	Elected	Resident
Akeem Mooltrey	Elected	Resident
Indira Pereira	Elected	Resident
Richard Prophete	Elected	Resident
Sam Tavares	Elected	Resident
Lauren M. Thompson	Elected	Resident
Ron Verna	Elected	Resident
Kay Williams	Elected	Resident
Fred Woodward	Elected	Resident
Children's Services of Roxbury	Elected	Agency
Dorchester Bay EDC	Elected	Agency
Madison Park Develop. Corp.	Elected	Agency
Project HOPE	Elected	Agency
Quincy Street Missional Church	Elected	Agency
The City School	Elected	Agency
The Food Project	Elected	Agency
WAITT House	Elected	Agency
YouthBuild Boston	Elected	Agency
Crosstown Church	Elected	Religious Institution
Saint Patrick's Church	Elected	Religious Institution

Name	Elected/member	Political role
Ideal Sub Shop	Elected	Business
Suffolk Construction	Elected	Business

### 5.3 Owners/tenants

Source:

Typology	Number
Commercial property owners	-
Industrial property owners	-
Commercial Tenants	-
Resident owners	-
Community organizations	-

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

Source: City of Boston (<http://hubmaps1.cityofboston.gov/egis/Map.asp>)

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	Sqm	\$/sqm	Sqm	\$/sqm	sqm	\$/sqm	Sqm	\$/sqm
Housing (1 to 3 family residential)	-	Ca. 410	-	Ca. 1,000	N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Commerce	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Industry	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Advanced services sector	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Parking	-	-	-	-	N.A.	N.A.	N.A.	N.A.

### 6.2 Average Market Value

Source: City of Boston (<http://hubmaps1.cityofboston.gov/egis/Map.asp>)

Typology	Before the initiative (1984)	After the initiative (2010)
Housing (1 to 3 family residential)	150	1,000
Housing (4 to 6 family residential)	-	-
Housing (7 or more family residential, condominium)	-	-
Commerce	-	-
Industry	-	-
Advanced services sector	-	-
Parking	-	-

### 6.3 Commerce and advanced services sectors

Source: Fieldwork; Google Maps;

Typology	Units	Renovated Buildings		New Buildings	
		sqm	sqm	sqm	sqm
Mall	0	N.A.	N.A.	N.A.	N.A.
Farmer market	1	N.A.	N.A.	N.A.	N.A.
Small retail	-	N.A.	N.A.	N.A.	N.A.
Handcrafts	-	N.A.	N.A.	N.A.	N.A.
Business financial	-	N.A.	N.A.	N.A.	N.A.
Administration buildings	-	N.A.	N.A.	N.A.	N.A.
Insurance	-	N.A.	N.A.	N.A.	N.A.
Restaurants	35-40	N.A.	N.A.	N.A.	N.A.
B&B	-	N.A.	N.A.	N.A.	N.A.
Hotel	4	N.A.	N.A.	N.A.	N.A.
Cinema	2	N.A.	N.A.	N.A.	N.A.
Museum	2	N.A.	N.A.	N.A.	N.A.
Theatres	2	N.A.	N.A.	N.A.	N.A.
Universities / campus	0	N.A.	N.A.	N.A.	N.A.

### 6.4 Community facilities

Source: City Of Boston – Roxbury Open Space by Type; Boston Public Schools, Fieldwork.

Typology	Units	Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after district (sqm or number)
		Private	public	private	Public	
Schools	9	N.A.	N.A.	N.A.	N.A.	N.A.
Public libraries	3	N.A.	N.A.	N.A.	N.A.	N.A.
Post office	2	N.A.	N.A.	N.A.	N.A.	N.A.
Hospital	0	N.A.	N.A.	N.A.	N.A.	N.A.
Safety Security	4	N.A.	N.A.	N.A.	N.A.	N.A.
Job center	-	N.A.	N.A.	N.A.	N.A.	N.A.
Public park	5	N.A.	N.A.	N.A.	N.A.	N.A.
Train Station	1	N.A.	N.A.	N.A.	N.A.	N.A.
Bus station	1	N.A.	N.A.	N.A.	N.A.	N.A.
Bike car sharing service	0	N.A.	N.A.	N.A.	N.A.	N.A.
Housing	-	N.A.	N.A.	N.A.	N.A.	N.A.

## 6.5 Accessibility

Source: MBTA.com; Google Maps for “by-car” category.

Distance from Central Boston	Average Time	Average Km
By subway + Bus	32 minutes	4.3
By bus	45 minutes	4
By car	10 minutes	5.2
By rail + subway	31 minutes	4

## 6.6 Supply chain: supply of local products

Products	Supplier (origin)	Distance from the area
Foods	N.A.	N.A.
Handcrafts	N.A.	N.A.
Others	N.A.	N.A.

## 6.7 Environmental data

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N.A.	N.A.	N.A.
Ratio of green space to built-up area	N.A.	N.A.	N.A.
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	N.A.	N.A.	N.A.
% use of space over 24 hours	N.A.	N.A.	N.A.
Density level per square metre of scheme	N.A.	N.A.	N.A.
% of recycled material used in the built environment	N.A.	N.A.	N.A.
% of non-renewable resources consumed in current scheme	N.A.	N.A.	N.A.
LEEDs, green building initiatives undertaken ( <a href="http://www.usgbc.org">www.usgbc.org</a> )	N.A.	N.A.	N.A.
Energy efficiency measures undertaken	N.A.	N.A.	N.A.
Other environmental indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.8 Social data

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N.A.	N.A.	N.A.
Social service personnel per 1,000 population	N.A.	N.A.	N.A.
Occupancy levels in residential area (voids and vacant properties)	N.A.	N.A.	N.A.
% of hospital recovery	N.A.	N.A.	N.A.
Other social indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.9 Geographical information (GIS based)

Source: [www.mass.gov](http://www.mass.gov); Fieldwork and desk analysis;

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis



## 7 SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

*Date:* February, 23 2012

*Day of the week:* Thursday

*Time:* 15.10

*Notes:* Vacant land. There is still a great amount of vacant land within the Dudley neighbourhood. Vacant plots are found very commonly along Dudley Street though this is one of the major within the whole neighbourhood. Dudley Street results to be one of the busiest, if not the busiest, within the neighbourhood as a whole with services and retail activities and public transport routes.



### Picture n.2

*Date:* February, 23 2012

*Day of the week:* Thursday

*Time:* 15.20

*Notes:* Playground on Dudley Street as part of the Vine Street Community Centre which was re-opened in the late 1990s thanks to the efforts of DSNi among other partners.





### Picture n.3

*Date:* February, 23 2012

*Day of the week:* Thursday

*Time:* 15.30

*Notes:* Dudley Town Common created by DSNI in collaboration with Boston Parks and Recreation Department. At that time of the day the Common was empty.



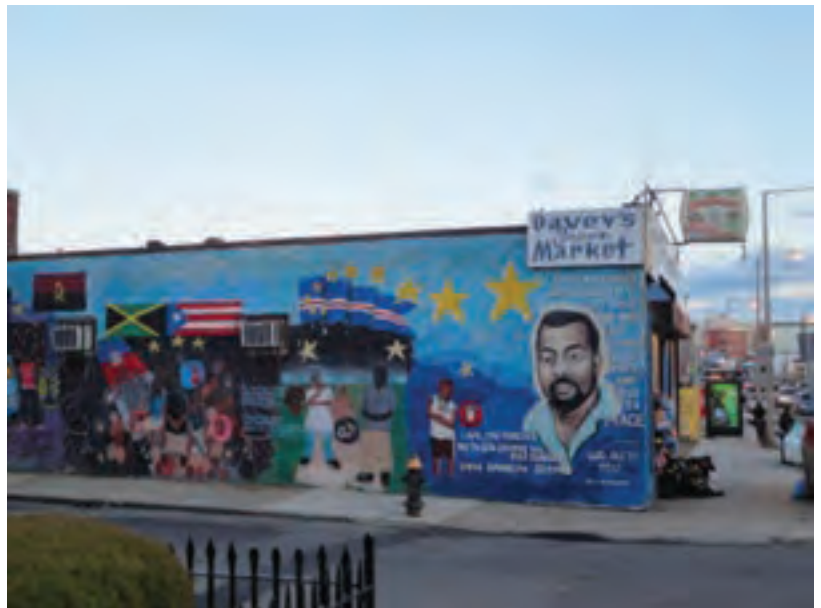
### Picture n.4

*Date:* February, 23 2012

*Day of the week:* Thursday

*Time:* 15.45

*Notes:* Murals are quite common in the Neighbourhood of Roxbury and may be found in different spots of the area. Probably, murals are used as a regeneration "tool" and are perceived by residents as giving a strong sense of community.



### Picture n.5

*Date:* March, 8 2012

*Day of the week:* Thursday

*Time:* 16.00

*Notes:* Schoolyard of Emerson Elementary Public School which is one of the nine public schools in the neighbourhood. The building, as well as the yard, is well maintained.



### Picture n.6

*Date:* March, 8 2012

*Day of the week:* Thursday

*Time:* 16.30

*Notes:* Greenhouse developed by DSNi in collaboration with the Food Project Initiative. The greenhouse is about 1,000 square metres large and is used for community initiatives such as classes on raised beds and gardening. Youths are involved in the summer in such kind of projects.



### Picture n.7

*Date:* March, 14 2012

*Day of the week:* Wednesday

*Time:* 15.00

*Notes:* Community Park with part of the Winthrop Estates residential development on the background. This Residential development was the first one to be completed on the Land Trust in 1994. Construction of the park started in a later phase with community involvement and participation. Apparently, in the summer time the park is very much used by the community.



### Picture n.8

*Date:* March, 30 2012

*Day of the week:* Friday

*Time:* 17.00

*Notes:* Dudley Village. New development completed in 2008 which provided the community with new 50 rental housing units. In this case DSNI collaborated with Dorchester Bay Economic Development Corporation which acted as the developer of the initiative.



### Picture n.9

*Date:* March 30, 2012

*Day of the week:* Friday

*Time:* 15.10

*Notes:* The Food Project Community Garden.

There are many community gardens within the whole neighbourhood and this is the result of joint efforts between DSNI and The Food Project. Raised -beds activities and other form of gardening are carried out within this community garden.



### Picture n.10

*Date:* March 30, 2012

*Day of the week:* Friday

*Time:* 17.30

*Notes:* The Kroc Community Centre is very likely to be the newest community centre in the whole Boston. DSNI collaborated with the Salvation Army in the context of the Workforce Initiative. However, after the completion of the Centre membership fees are too high and do not result affordable for the community. Currently, DSNI is working with the management of the Centre to lower the membership fees.



### Picture n.11

*Date:* March 30, 2012

*Day of the week:* Friday

*Time:* 17.00

*Notes:* Play Area opposite of Dudley Village. This area was already there before Dudley Village was built. Despite the presence and availability of this play area, DSNI succeeded through its efforts to have new children playgrounds built as part of the Dudley Village development.



### Picture n.12

*Date:* March 30, 2012

*Day of the week:* Friday

*Time:* 16.30

*Notes:* DSNI Office on 504, Dudley Street.





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study** (denomination): **Fort Point District**

**Researcher:** Jusy Calabro'

## Survey Form

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## 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

### 1.1 General Information

ZONING CODE	Specify the zoning map (commercial district, business district, neighborhood district, etc..) in which the initiative works: <b>Art.27, map 4 general code: Planned Development Area</b> <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a>		
Main Theme	<input checked="" type="checkbox"/> Partnership agreement		
	<input type="checkbox"/> Business Improvement District		
	<input type="checkbox"/> Community Development Corporations		
	<input type="checkbox"/> Urban Agricultural Linkages		
	<input type="checkbox"/> Social Enterprise		
	<input type="checkbox"/> University-focused		
	<input type="checkbox"/> Non-profit assistance/development		
	<input type="checkbox"/> Business incubators		
Location	Neighbourhood	SOUTH BOSTON	
	ZIP Code	02210	
	City	BOSTON	
	County	SUFFOLK	
	State	MASSACCHUSETTS	
Start-up Source: Project data	Year 2007		
Years in operation Source: interviews	Year 5		
Numbers of renewal Source: PDA Melcher street	Year 2011	163,225 s.f. (buildings in Melcher Street)	
Dimension Source: Master Plan	Area (sq. Km)	100 acres - 0.404686 sq. Km	
	Residents	1905	
Partnership Institutional Typology	Typology		Reference by Law
	<input type="checkbox"/> BID: Business Improvement District		
	<input checked="" type="checkbox"/> PA: Public Agency		
	<input type="checkbox"/> CDC: Community Development Corporations		
	<input type="checkbox"/> SE: Social Enterprise		
	<input type="checkbox"/> NPOMS: Non Profit Organization for implementing the Main Street initiative		
	<input type="checkbox"/> NPCBPO: Non Profit Community-Based Planning Organization other than CDC, SE, MS		
	<input type="checkbox"/> TOD		
	<input type="checkbox"/> Other (specify)		
Partnership composition Source: Memorandum of Agreement 2005- 2007	Name	Public/Private/NGO	% Initial Capital Invested
	BRA	PUBLIC	None for Public Realm Enhancement
	GILLETTE COMPANY (32 ACRES)+12 ACRES	CORPORATION	32%
	USPS- POSTAL SERVICE (23	INDIPENDENT	60%



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	ACRES)	ESTABLISHMENT	
	BEACON (1 ACRE)	L.L. COMPANIES	None for Public Realm Enhancement
	MELCHER OWNER (5 ACRES)	L.L. COMPANY	None for Public Realm Enhancement
	W2005 (6 ACRES)- Archon group	L.L. COMPANIES	8%
Number of board director Source: .....	-		

## 1.2 Abstract of the initiative

(Source/s: PDA Master Plan- Interviews-Economic projections)

The case study in brief (What is the case study, max 15 rows)

Fort Point district is an historical urban district within South Boston Waterfront neighborhood. The case study area is the south part of the district, historically characterized by manufacturing and trade activities.

The Fort Point District 100 Acres Master Plan, approved by BRA in 2006, aim at regulating the area giving land use and dimensional guidelines of this great public space between South Boston Waterfront and Downtown of Boston. The B.R.A., Boston's planning and economic development public agency, involved community, proponents, elected officials and stakeholders to draw up a plan for growth and development within the 100 Acres, taking into account the preexistent facilities and infrastructures capacity, in order to encourage a lively mixed-use urban district. The site's ownership is concentrated among several large landholders that own approximately 93 percent of the entire site. These are the P&G/Gillette Company, the USPS, Archon Group (W2005), and Beacon Capital Partners Inc..

A key component of this Master Plan is an agreement among the landowners and the City, through the BRA, on its implementation. All owners agreed on it following some arrangement, but the two most important actors of the negotiation imposed some condition. For instance, the Gillette Company agreed under the condition of improving its trucks accessibility in the area and build up the square feet of the company; the USPS agreed to put on the market the area within 100 acres for "Public Realm Enhancement" construction, and relocate its facilities into an adjacent one with higher property values; all the others aimed at improving their properties values.

Furthermore, the B.R.A is the coordinator of the partnership and the manager of the Sinking Fund. All infrastructure and public realm improvements will be phased and executed as part of the planned new private development.

The Challenge (Why the case worth discussing, max 5 rows)

The 100 Acres master plan provides an overall land use for the district, preserving industrial uses while encouraging an increased mix of uses; preventing conflicts with nearby commercial and residential uses and proposing the development of up 5.9 million square feet of new construction. The Public realm Enhancement is improved through private investments in the area.

Gillette with its South Boston Manufacturing Center is one of the most important landowners in the area, the single larger manufacturing employer, and it pays the City of Boston over \$3,000,000 in real estate taxes on the Center each year, and also pays significant business machinery taxes to the Commonwealth of Massachusetts.

The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)

The area, quite similar to the riverfront of an historical European city, is full of connections that the plan stressed through new links with the existing developments to the water. It is within the Innovation District area, a Economic development Area that aim at fostering new business and enterprises following a innovative and sustainable rational. The overall objective is to transform 100 acres into a district with a strong residential component and a good mix of functions, according to the Innovation District initiative, while preserving the ancient features of manufacturing and wood trade area.

Currently, the major uses of the 100 Acres are industrial, manufacturing, warehouse, research and development and office, surface parking and artist live-work space located in the Archon Group's buildings.

The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)

We can summarize the most important features of this urban development project as follow:

- Increase the city's housing supply
- Expanding the city's economic base
- Enhancing the environment
- Strengthening transportation infrastructure
- Mitigating development impacts
- Vital mix-used neighborhood
- Minimize conflicts between different uses

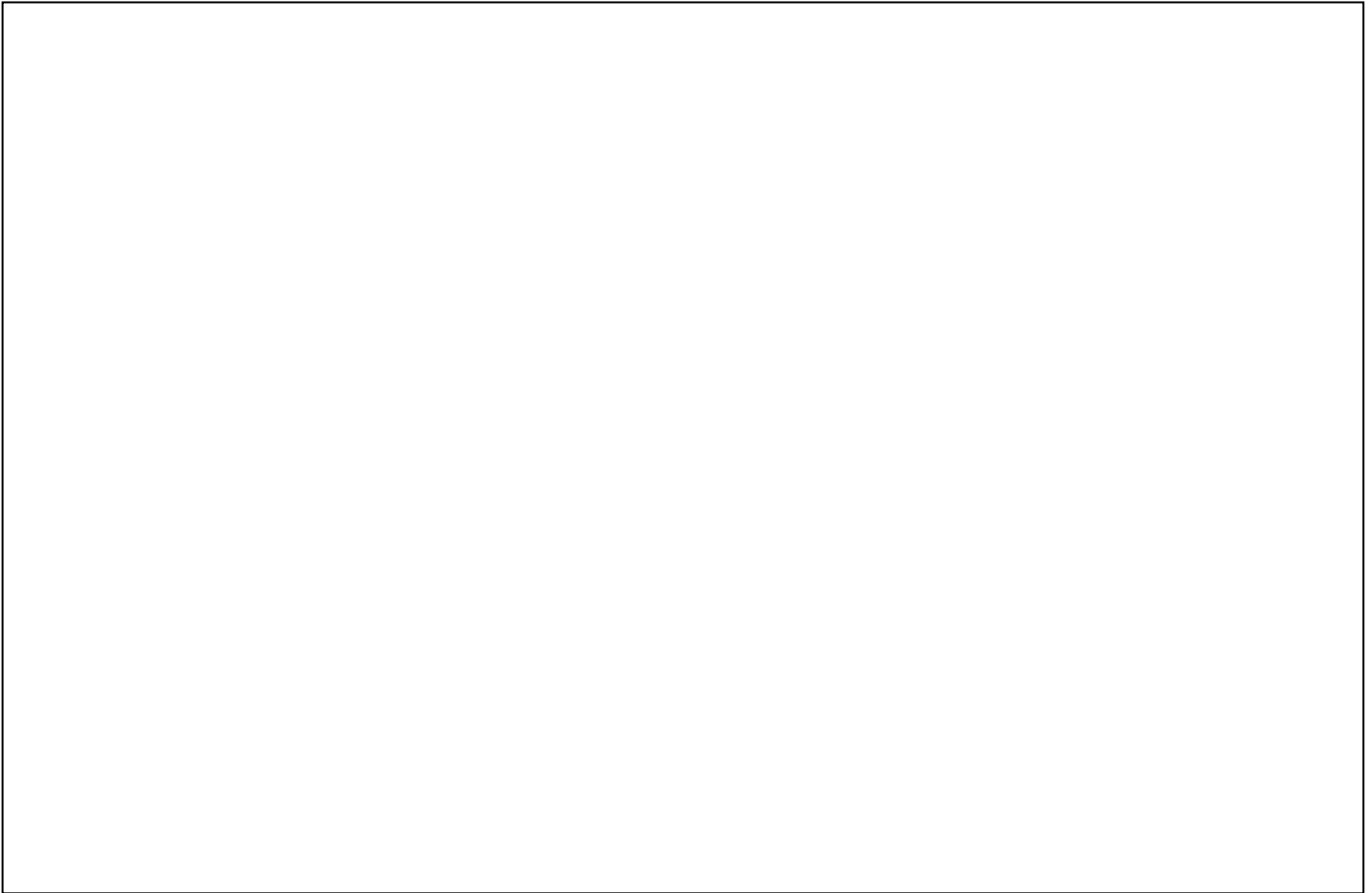


- Enhance the South Boston Community
- Promote access to shared natural resources

Particularly, the aim is one-third of residential use or art related, with the remainder composed of a mix of uses, such as industrial, manufacturing, research, retail, office, open spaces, etc

### 1.3 Map

(Source: .....)





## 1.4 Budget size

(Source: master plan data-fiscal analysis 2005)

Expenditure*	\$ 2.3 billion
Revenue	\$69,312,855 million (expected)
Total Budget	0

\*Initial budget for construction and maintenance

## 1.5 Vacancy rate

(Source: master plan data - census data 2000 e 2010)

Vacancy	% 2000	% 2010	Percentage of change from previous year*	Percentage of change from the starting point	Expected Vacancy rate
Vacant commercial property (sqm)	-	-	-	-	-
Vacant housing property*(units)	10,5%	14%	+ 3,5%	-	5%
Vacant land (sqm) 145688,4	-	40%	-	-	-

## 1.6 Strategic Priorities

(Source: master plan data - interviews)

Priorities	Description
× Retail Enhancement	<b>All ground floors are expected to be commercial activities</b>
× Economic Revitalization	<b>5.9 million square feet of gross floor area of new development: 39% Residential – 36% Office – 25% Other Commercial</b>
□ Security and Safety	
× Building Restoration/Renewal	<b>2,300 units of new housing of which 300 are affordable All buildings restored with new techniques of green architecture (“innovative housing”) New housing following the Innovation District rational</b>
× Innovation/Green Technologies	<b>economic and manageable sustainable technologies in order to reduce pollution, energy costs and impacts on the environment Performance standards for environmental impact</b>
□ Education and Training	
× Job Creation/Social works	<b>Job creation is one of the priorities of the initiative, through maintenance of SBMC (thousands of employees) and the creation of 24,600 jobs of which 12,300 permanent</b>
□ Technology Transfer	
□ Capacity Building	



× Local services/provisions (housing, leisure, etc.)	<b>The Public realm Enhancement is an important objective that involve open spaces and roads (construction and maintenance)</b>
<input type="checkbox"/> Local produce valorisation	
<input type="checkbox"/> Cultural enrichment	
× ...Natural Beauty, Green Space and biodiversity	<b>Open spaces and harbour walk implementation</b>

### 1.7 Private sector involvement

(Source: Memorandum of Agreement )

All Business enterprises are associated: ☐ if not, indicate the %

- Three of the partners are associated: 3 Limited liability companies: W2005, Beacon, Melcher

All merchants are associated : ☐ if not, indicate the % \_\_\_\_\_

Other private entities (no profit) ☐ if not, indicate the % \_\_\_\_\_

### 1.8 Public investment programs\*

(Source: interviews, master plan)

<b>Policy focus for public investment program</b>	<b>Description</b>
Tax policy focus	Low taxes for affordable housing
Fiscal policy focus	
Economic development organizations	
University focus	
Recruitment	
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	I-cubed legislation is expected to give public bonds to start ppps
Credit Access	
Local Welfare Policy	
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	PDA for overlay districts (100 Acres Fort Point District) to codify the development rights and consequent public obligations associated with the privately-owned land

\*the development in Fort Point 100 Acres is driven by the market, the only benefits for enterprises are low taxes to make profitable stay within the area. (source: interview-3/12/2012- to Mr. Boley, senior architect at ADD Inc., designer of 100 acres Mater Plan)



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

**2.1 Demographic and housing characteristics**

**2.2 Labor Market**

**2.3 Overall socioeconomic data**



### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

(Source: fiscal analysis 2005 - master plan data 2007)

Items	Year	Expenditure (\$)		Total
		Public	Private	
General & administrative				
Social services - <b>roadways cost</b>	2007		\$ 64 m	\$ 64 m
Capital improvements				
Streetscape/ sidewalk maintenance and repair				
Graffiti removal				
Beautification & Horticulture				
Holiday lighting				
Sanitation				
Security				
Marketing, communication special events and tourism				
Education				
Job creation initiative				
Resident initiative				
<b>open spaces cost (construction+ maintenance )</b>	2007		\$ 31m + \$1.1 m(annually)	\$ 32.2 m
<b>Building and land cost</b>	2007		\$ 2.2 b	\$ 2.2 b

#### 3.2 Source of revenue \*

(Source: master plan data)

Items	Year	revenue (\$)
Program service revenue	-	
Special contracts	-	
Investment income	-	
Fundraising & special events	-	
Government Grants	-	
Private contributions	-	
Interest	-	
Assessment (fee or levy)	-	
Rental income	-	
Tax income (commercial+ housing+ job)	Since 2007 to... (Period Under construction )	\$(39+ 28+5,3) m = \$72,3m
Residential tax		\$ 8 m
Business activities		\$1,927,150 (corporate and business exercise tax collections)
Total state tax revenue	10 year of build-out	\$69,312,855 million
City property tax revenue	annually	\$50.1 million
Personal Income taxes	10 year of build-out	\$58,250,389

\*all source of revenue are expected

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

(Source: interviews- master plan data- Innovation district website)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area*	Brand of Innovation District to foster new business	Almost 300 within the Innovation District	Low taxes	
Creation of new business (start-up)	Brand of Innovation District to foster new business	-		
Retention of business	New roads system- better accessibility for trucks	-		
Assistance weak business				

\* Attraction through making enterprises aware of the importance a new localization. The Innovation District brand support new business: the aim is to share know-how and improve competitiveness. Affordable housing for workers within Innovation District.

### 4.2 Services and improvements

(Source: interviews- master plan data- MOA- PDAs)

Programs	Description	Item	Financial sources	
			Public	Private
<input type="checkbox"/> Retail Enhancement	-			
<input type="checkbox"/> Economic Revitalization	-			
<input type="checkbox"/> Security and Safety	-			
<input checked="" type="checkbox"/> Building Restoration/Renewal	PDA amendment n. ... of Melcher owner within the 100 acres Master Plan	Restoration of three buildings in Melcher Street(15163 mq)		X
<input checked="" type="checkbox"/> Innovation/Green Technologies	LEED certification for each new building or renovated one	All buildings restored		X
<input type="checkbox"/> Education and Training	-			
<input checked="" type="checkbox"/> Job Creation/Social works	Temporary jobs (under construction) and permanent jobs for new businesses	6150 under construction- 12300 permanent jobs		X
<input type="checkbox"/> Technology Transfer	-			
<input type="checkbox"/> Capacity Building	-			

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.



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<input checked="" type="checkbox"/> "Participation and encouragement of.. (es. affordable housing)"	Affordable housing for workers that move in the area	300 units of affordable housing		X
<input type="checkbox"/> Local produce valorisation	-			
<input type="checkbox"/> Cultural enrichment	-			
<input checked="" type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	Public Realm Enhancement	11 acres of Open spaces		X

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations (not partners)

(Source: FORT POINT DISTRICT PLAN ADVISORY COMMITTEE- 100 acres master plan)

Name	Typology (size)*	Level of influence (with respect the size of the organization)
The Boston Harbor Association	Association	High level of influence (project)
Seaport Alliance for Neighborhood Design	Association	High level of influence (project)
Fort Point Cultural Coalition	Association	High level of influence (project)
Save the Harbor/Save the Bay	Association	High level of influence (project)
City of Boston Office of Civil Rights		
The Children's Museum		

\*charrette -working group proposals for 100 Acres Master Plan

### 5.2 Local elected official\* and community board members

"Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for."

(Source: FORT POINT DISTRICT PLAN ADVISORY COMMITTEE)

Name	Elected/member	Political role
Rod Macdonald	elected	Chair
Michael Foley + 15 people	elected	South Boston representatives
Bob Reyes	Mass Port Authority	Government representative
Marianne Connolly Lisa Marx	Mass Water Resource Authority	Government representatives
Jhon Coglianò Todd Fontanella (alternate)	Mass Executive Office of transportation and Construction	Government representatives
Bryan Glascock Chris Bush (alternate)	Boston Environment Department	Government representatives
Ellen Lipsey	Boston Land marks Commission	Government representative
Ben Lynch	Mass Department of Environmental Protection	Government representative
John Weber	Mass Executive Office of Environmental Affairs	Government representative
Vineet Gupta Ralph DeNisco	Boston Transportation Department	Government representatives
Vivien Li	The Boston Harbor Association	At large representatives
Bruce Berman Patty Foley (Alternate)	Save the Harbor/Save the Bay	At large representatives
Stephen Spinetto	City of Boston Office of Civil Rights	At large representatives
Neil Gordon	The Children's Museum	At large representatives
Richard Dimino Jessica Conaway (Alternate)	Artery Business Committee	At large representatives
Richard Meyer	Boston Shipping Association, Inc.	At large representatives
Jim Klocke Jim Boyle (Alternate)	Greater Boston Chamber of Commerce	At large representatives
Jack Wiggin	University of Massachusetts/ Boston: Urban Harbors Institute	At large representatives
Terry W. Savage Sarah Peskin (Alternate)	National Park Service	At large representatives



Anita Lauricella Cheryl Forte (alternate)	Fort Point Cultural Coalition	At large representatives
Valerie Fletcher Chris Hart (Alternate)	Adaptive Environments	At large representatives
Philip Warburg Peter Shelley (Alternate)	Conservation Law Foundation	At large representatives
David Spillane	Boston Society of Architects	At large representatives
Valerie Burns	Boston Natural Areas Network	At large representatives
Tom Powers	Boston Harbor Island Alliance	At large representatives
Kairos Shen Richard McGuinness Jeffrey Lin Brad Washburn	BOSTON REDEVELOPMENT AUTHORITY	Project Team
Richard Shaklik Tom Miller Jansi Chandler Te-Ming Chang Isabel Kriegel Jeong-Jun Ju Yan Gao		Project Staff

\*REPRESENTATIVES

### 5.3 Owners/tenants

(Source: master plan- on field analysis)

Typology	Number
Commercial property owners	n/a
Industrial property owners	2 big enterprises
Commercial Tenants	n/a
Resident owners	n/a
Community organizations	About 10 within 100 acres



## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

(Source: Interview)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
<b>Housing<sup>2</sup></b>	-	(\$ 297) <b>\$3195/sqm</b>	<b>15163 sqm</b>	\$280-350s.f. <b>\$2012-3766/sqm</b>	2,5million s.f. <b>232250 sqm</b>	\$325/ s. f. <b>\$3497/sqm</b>
Housing (1 to 3 family residential)						
Housing (4 to 6 family residential)						
Housing (7 or more family residential, condominium)						
<b>Commerce<sup>3</sup></b>	-	-	-	\$150-250 s.f. <b>\$1614- 2690 sqm</b>	3,380 million s.f. <b>314002 sqm</b>	\$ 200-225/ s.f. <b>\$2152- 2421 sqm</b> \$ 50-100/s.f. <b>\$538- 1076 sqm for Tenant Improvement(T. I.)*</b>
<b>Industry</b>	-	-	-	-	-	-
<b>Advanced services sector</b>	-	-	-	-	-	-
<b>Parking<sup>4</sup></b>	-	-	-	-	-	20 K (above grade)- 60K (below) <b>\$215200sqm- 64560000sqm</b>

\*a Tenant improvement is any change of a commercial or industrial property by its owner to accommodate the needs of a tenant (such as floor and wall covering, partitions, air conditioning...). "Who bears what portion of TI costs is negotiated between the lessor and the lessee, and is usually documented in the lease agreement".

Definition T.I. (<http://www.businessdictionary.com/definition/tenant-improvements-TI.html>)

### 6.2 Average Market Value

(Source: interview)

Typology	Before the initiative (Year)	After the initiative <sup>5</sup> (expected)	During the initiative <sup>6</sup>
<b>Housing</b>		\$500 per s.f.(expected)- <b>\$5380/sqm</b>	(\$309,13/sf) <b>\$3324 sqm</b>

<sup>2</sup> Source: Mr. Boley's interview-ADD Inc 3/12/12, 311 Summer Street, Boston

<sup>3</sup> Source: Mr. Boley's interview-ADD Inc 3/12/12, 311 Summer Street, Boston

<sup>4</sup> Source: Mr. Boley's interview-ADD Inc 3/12/12, 311 Summer Street, Boston

<sup>5</sup> Source: Mr. Boley's interview-ADD Inc 3/12/12, 311 Summer Street, Boston

<sup>6</sup> <http://www.cityofboston.gov/assessing/search/?parcel=0602751306&streetnumber=&streetname=&unitnumber=&owner=>



Commerce		\$375 per s.f. (expected)- <b>\$4035/sqm</b>	
Industry (lot area) <sup>6</sup>		-	\$294,78-\$130,58- <b>\$ 3163-1398 sqm</b>
Advanced services sector		-	-
Parking		-	-

1sf=0,09 sqm 1sqm=10,76 sf

Parcels considered: Lot size 12051 sq ft = 1.119574 sqm industrial; 16187 sq ft= housing

### 6.3 Commerce and advanced services sectors

(Source: Project data- Master Plan)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Mall						
Farmer market						
Small retail					59456 sqm	
Handcrafts						
Business financial						
Administration buildings					195090 sqm	
Insurance						
Restaurants						
B&B						
Hotel						
Cinema						
Museum						
Theatres						
Universities / campus						
Research & Development					59464 sqm	

### 6.4 Community facilities<sup>7</sup>

(Source: interview + master plan)

Typology	Total (sqm or number)		Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after project (sqm or number)
	private	public	Private	public	private	public	
Schools	yes						
Public libraries							
Post office							
Hospital							
Safety Security	yes						
Job center							
Public park		4046.9 sqm					46134,66 sqm

<sup>7</sup> expected



<b>Train Station</b>							
<b>Bus station</b>	yes						
<b>Bike - Car sharing service</b>	yes						
<b>Housing</b>					2000units	300units	2300 units

## 6.5 Accessibility

(Source: google map)

<b>Distance from Downtown</b>	<b>Time</b>	<b>Km</b>
<b>By subway</b> (Downtown crossing-Summer Street)	10 minutes (red line subway+ by walk)	1.12 km
<b>By bus</b>	3 minutes	1.12 km
<b>By car</b>	3 minutes	1.12 km
<b>By rail</b>	-	-

## 6.6 Supply chain: the supply of local products

(Source:.....)

<b>Products</b>	<b>Supplier (origin)</b>	<b>Distance from the area</b>
<b>Foods</b>	-	-
<b>Handcrafts</b>	-	-
<b>Others</b>	-	-

## 6.7 Environmental data

(Source: interviews and project data)

<b>Indicator</b>	<b>Before the project</b>	<b>After the project</b>	<b>Percentage point change from the beginning</b>
<b>CO2 emission per square meter</b>			
<b>Ratio of green space to urban form</b>			
<b>Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme</b>			
<b>% use of space over 24 hours</b>			
<b>Density level per square metre of scheme</b>			
<b>% of recycled material used in the built environment</b>			
<b>% of non-renewable resources consumed in current scheme</b>			
<b>LEEDs, green building initiatives undertook (www.usgbc.org)</b>	none	yes	100% of new and restored building
<b>Energy efficiency measures undertook</b>			
<b>Other environmental indicators specifically applied to the initiative</b>			



## 6.8 Social data

(Source: google map- census data- project data)

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate (all the district)			(2004-2008) -13%
Social service personnel per 1,000 population			
Occupancy levels in residential area (voids and vacant properties)	14% (2000)	5% expected	
% of hospital recovery			
Other social indicators specifically applied to the initiative			

## 6.9 Geographical information (GIS based)

(Source: .....)

Layer	Description
Land use map	www.mass.gov
Zoning map	www.mass.gov
Community facilities	www.mass.gov
Cultural facilities (Theatres, cinemas, art centres)	Art galleries and art centers
Heritage	Some ancient building in red brick of the 19 <sup>th</sup>
Bicycle ways	www.mass.gov
Pedestrian routes and amenities	www.mass.gov
Traffic calming measures	none
Public spaces (Squares, plazas, streets)	www.mass.gov
Green spaces	2- Binford street park, Wormwood park
Connectivity grid	It still doesn't exist but it is expected (from the approved Master Plan)

## 7.1 Map with view points



## Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

**Date:**2/08/2012..

**Day of the week:** Wednesday

**Time:** 11:30 a.m.

#### Notes.

Summer Street view. This is a commercial and office street with a lot of spaces for lease and architecture and design studios



### Picture n.2

**Date:**2/08/2012

**Day of the week:** Wednesday

**Time:** 11.30 a.m.

#### Notes:

Summer Street to A Street view, from the highway.

Buildings here have double accesses, one on Main street and the other one A Street.

The property value is medium-high, as you can see from the picture, the building are recently renewed.



### Picture n.3

**Date:**2/08/2012

**Day of the week:** Wednesday

**Time:** 11.30 a.m.

#### Notes:

Summer Street point of view.

The area is still characterized From a big parking lot.



**Picture n.4**

**Date:** 2/08/2012

**Day of the week:** Wednesday

**Time:** 11.30 a.m.

**Notes:** Crossroad between A Street and Melcher Street. Here there are the oldest building with one of the footbridge within the area



**Picture n.5**

**Date:** 2/08/2012

**Day of the week:** Wednesday

**Time:** 11.30 a.m.

**Notes:** Point of view from the crossroad Between Necco Street and A Street. The area is characterized from a big parking lot, owned by Gillette a multi-storey car park and some renewed building venue of architectural and companies studios



**Picture n.6**

**Date:** 3/12/2010

**Day of the week:** Monday

**Time:** 12:00 a.m.

**Notes:** Fort Point is bounded by the Harbour Walk, a public walkway that give the pedestrian the possibility to walk following the water line of the South Boston waterfront



**Picture n.7**

**Date**3/12/2010

**Day of the week:** Monday

**Time:** 12:00 a.m.

**Notes:**

The point of view is in A Street watching A small green area, with some street Furniture.



**Picture n.8**

**Date**3/12/2010

**Day of the week:** Monday

**Time:** 12:00 a.m.

**Notes:**

This is channel street, with some new Building and other one recently restored, all with the ground floor for commercial activities, artist studios, exhibitions.

The pre-existing conditions of the area are strongly preserved and re-used following the landmark district constraints.

Here you can see the sidewalks bounded with the rails that served the area originally a place for wool wood trade.



**Picture n.9**

**Date**3/12/2010

**Day of the week:** Monday

**Time:** 12:00 a.m.

**Notes:.**

Here a view of Channel Center Street, with buildings renewed with studios, offices and commercial activities.



**Picture n.10**

**Date**3/14/2010

**Day of the week:** Monday

**Time:** 12:40 a.m.

**Notes:**

A view from the Channel Centre ground floor.



**Picture n.12**

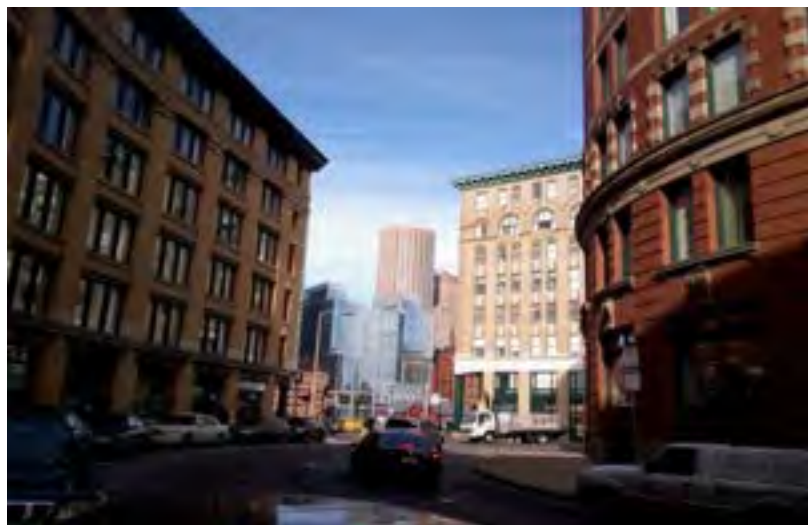
**Date**3/12/2010

**Day of the week:** Monday

**Time:** 12:00 a.m.

**Notes:**

Melcher Street, with typical Architectural features of Fort Point District, in yellow and red bricks. The point of view indicates Fort Point on one side and Downtown, on the opposite one of the channel.



**Picture n.13**

**Date**3/14/2010

**Day of the week:** Monday

**Time:** 12:40 a.m.

**Notes:**

View from crossroad between Binford street and Channel Center Street. On the left a restored building with studios at the basement, on the background a old building with apartment for artists that live in the area.



**Picture n.14**

**Date**3/14/2010

**Day of the week:** Monday

**Time:** 12:40 a.m.

**Notes:**

View of the Channel Centre from A Street:  
studios, company offices, housing and  
training activities.





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – *Northeastern University* of Boston (MA)

**Case Study:** *ST. MARK'S AREA MAIN STREET* ([www.smams.org](http://www.smams.org))

**Researcher:** Anna Ferraiuolo (unit of Reggio Calabria)

## Survey Form

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## 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

### 1.1 General Information

<b>Zoning Code</b> <i>Source:</i> <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a>	Specify the zoning map (commercial district, business district, neighborhood district, etc...) in which the initiative works - Dorchester Avenue Neighborhood District Boundary - Residential Subdistricts - Neighborhood Design Overlay District <a href="http://www.bostonredevelopmentauthority.org/pdf/ZoningCode/Maps/5KL_DorchesterAve_S.pdf">http://www.bostonredevelopmentauthority.org/pdf/ZoningCode/Maps/5KL_DorchesterAve_S.pdf</a>	
<b>Topical areas</b>	<input type="checkbox"/> Partnership agreement	
	<input type="checkbox"/> Community Development	
	<input type="checkbox"/> Urban Agricultural Linkages	
	<input type="checkbox"/> Social Enterprise	
	<input type="checkbox"/> University-focused	
	<input checked="" type="checkbox"/> Non-profit assistance/development	
	<input type="checkbox"/> Business incubators	
<b>Location</b>	<i>Neighbourhood</i>	South Dorchester
	<i>ZIP Code</i>	02124
	<i>City</i>	Boston
	<i>County</i>	Suffolk
	<i>State</i>	Massachusetts
<b>Start-up</b> <i>Source: website</i>	<i>Year</i>	1998 SMAMS began as an informal group
<b>Years in operation</b>	<i>Year</i>	1998 - present
<b>Number of renewals</b> <i>Source: website</i>	<i>Year</i>	1999 SMAMS won Boston Main Streets designation as a member of the Boston Main Street network
<b>Dimension</b> <i>Source: website</i>	<i>Area (sq. Km)</i>	0.03716 (approximately) (400,000 square feet)
	<i>Residents</i>	30,000 (approximately)
<b>Partnership Institutional Typology</b> <i>Source: website</i>	<i>Typology</i>	<i>Reference by law</i>
	<input type="checkbox"/> BID: Business Improvement District	
	<input type="checkbox"/> PA: Public Agency	
	<input type="checkbox"/> CDC: Community Development Corporations	
	<input type="checkbox"/> SE: Social Enterprise	
	<input checked="" type="checkbox"/> NPOMS: Non profit organization for implementing the Main Street initiative	Boston Main Street Network (Program 1995)
<input type="checkbox"/> NPCBPO: Non profit Community-Based Planning Organization other than CDC, SE, MS		

Partnership composition <i>Source: website</i>	Name	Public/Private/NGO	% Initial Capital Invested
	Local businesses, residents, commercial landlords, civic associations, neighborhood organizations, city and state elected officials	NPO	n/a
	City of Boston	Public	*
	Corporate sponsors	Private	n/a
	National Main Street Center	NPO	n/a
*Each of Boston's Main Street communities receives \$270,000, allocated over four years, in start-up funding from Boston Main Streets. Source: <a href="http://www.bos.frb.org/commdev/c&amp;b/2005/winter/Main.pdf">http://www.bos.frb.org/commdev/c&amp;b/2005/winter/Main.pdf</a>			
Number of board directors <i>Source: website/Form 990 2011</i>	12 (1- president, 1 vice-president, 1 executive director, 1 clerk, 1 treasure, 8 directors)		

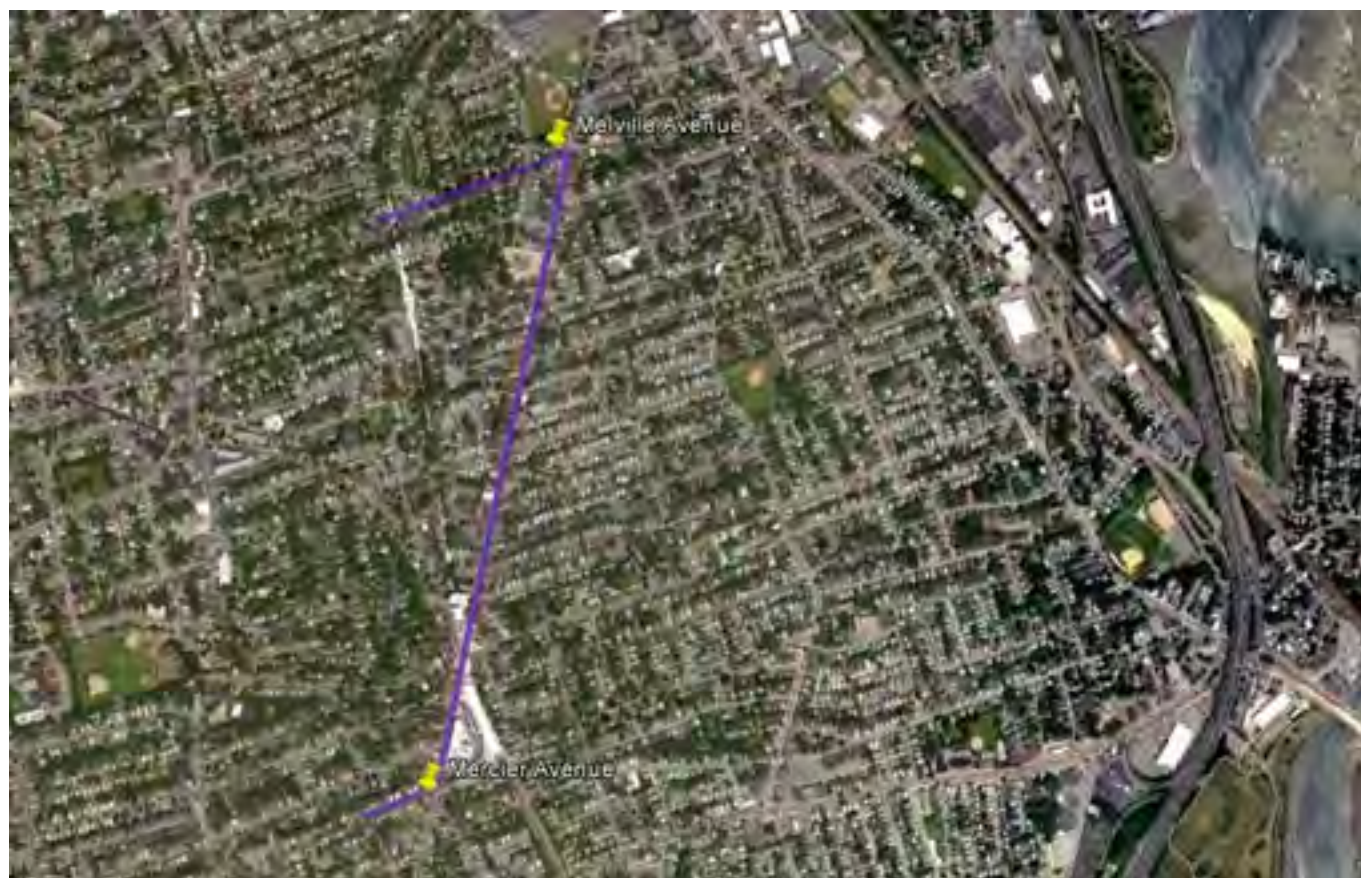
## 1.2 Abstract of the initiative

Sources: website/brochure/interview/Form 990

<p><i>The case study in brief (What is the case study, max 15 rows)</i></p> <p>St. Mark's Area Main Street is a local business district on Dorchester Avenue from Melville Avenue at the north to Mercier Avenue at the south, in the Dorchester neighborhood of Boston, Massachusetts. The district is approximately 5 miles south of Boston's downtown.</p> <p>The SMAMS district is undergoing a once-in-a-lifetime transformation. With a completely rebuilt MBTA Red Line Station, a major commercial/residential Transit-Oriented Development project, re-routing the streets leading into Peabody Square, and new businesses discovering the neighborhood, the district is becoming a destination for residents, shoppers and merchants. SMAMS played a major role in all these projects, and continues to drive neighborhood's renaissance with storefront renovations, business recruitment, and developing a "green street" program to decrease pollution from stormwater runoff.</p> <p><i>The Challenge (Why the case worth discussing, max 5 rows)</i></p> <ul style="list-style-type: none"> <li>• Make Peabody Square and the entire SMAMS district safer for pedestrians, drivers and cyclists</li> <li>• Make the public territory of Peabody Square and Dorchester Avenue more welcoming as a destination</li> <li>• Improve the "public face" of businesses in the SMAMS District, and increase the mix and variety of businesses, in order to increase foot traffic and draw more customers</li> </ul> <p><i>The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)</i></p> <p>Dorchester Avenue is the "Main Street" of Dorchester and a major route for local traffic and South Shore commuters. The district is served by the Ashmont/Peabody Square and Shawmut subway stations, the historic Mattapan Trolley line, and many bus routes, accommodating 17,000 riders each day.</p> <p>Located along one of Boston's major boulevards, the district up to a decade ago has experienced little of the urban redevelopment common in many of Boston's neighborhoods.</p> <p>The residential neighborhoods surrounding St. Mark's Area Main Street are diverse, multi-ethnic, and comprise a broad mix of incomes. From an informal group of local residents and businesses who knew it was time to develop neighborhood's rich potential has become a highly organized and active community, willing to volunteer time and effort to improve the neighborhood.</p> <p><i>The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)</i></p> <p>Residents and business owners in the St. Mark's Area Main Street district have devoted countless hours working together to develop a vision that will restore this once-vital urban neighborhood physically, visually and functionally.</p> <p>Goals:</p> <p>Serve the needs of the area's residents, businesses, commuters and visitors; Raise the profile of the commercial district (e.g. banners, kiosks, etc.); Increase merchant participation in the Main Street organization, including established businesses and the expanding Vietnamese business community; Provide merchants with technical assistance and with financial and design assistance for storefront renovations; Recruit appropriate businesses to fill vacant storefronts; Redevelop the Ashmont MBTA Station and the Banton Street lot (which has been vacant for 20 years).</p>	
--	--

### 1.3 Map

Source: Aerial photography, Office of Geographic Information (MassGIS), Commonwealth of Massachusetts Information Technology Division <http://www.mass.gov/mgis/colororthos2008.htm>



Latitude: 42.165886 N  
Longitude: 71.035447 O

Latitude: 42.174575 N  
Longitude: 71.034124 O

### 1.4 Budget size

Source: 2005/2008/2009/2010/2011 990-Form

		2004	2007	2008	2009	2010
Expenditure	\$	91699	87930	94286	82553	88834
Revenue	\$	96531	94101	98693	99202	94350
Total Budget	\$	5451	17939	20582	49473	43856
Of which: Asset	\$	619	11768	16175	32824	38340

## 1.5 Vacancy rate

Source: Census and documents of Bra/SMAMS

Vacancy	% 2000	% 2010	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property ( <i>sqm or units</i> )	*	*	*	*
Vacant housing property ( <i>sqm or units</i> )	**	**	**	**
Vacant land ( <i>sqm or units</i> )	***	***	***	***

\* 2 retail spaces in Ashmont Station are still vacant (30 m<sup>2</sup>)

\*\* per unit in Ring 0,5miles: in 2000 on a total of 5608 housing units on 4% were vacant - in 2010 on a total of 5859 housing units on 6,9% were vacant

\*\*\* "The Banton Street Lot", a large vacant lot in the heart of the district: the project of Renovation of Entire front of building for conversion into 24 residential units with 50 parking spaces on first floor is board approved. (1700 m<sup>2</sup>)

## 1.6 Strategic Priorities

Source: Statement of Program Service Accomplishments in 990 Form, executive director, website

Priorities	Description
<input type="checkbox"/> Retail Enhancement	
<input type="checkbox"/> Economic Revitalization	SMAMS works with local business, residents and community organizations to revitalize local business district and to strengthen community
<input type="checkbox"/> Security and Safety	
<input type="checkbox"/> Building Restoration/Renewal	SMAMS strives to improve the economy and the aesthetics of the St Mark's community through building rehabilitation
<input type="checkbox"/> Innovation/Green Technologies	SMAMS participated in renovation of the historic Peabody Square Clock*
<input type="checkbox"/> Education and Training	SMAMS sponsored a visit by the U.S. Small Business Administration (SBA) and a visit, with translator, to all Vietnamese-owned businesses in district
<input type="checkbox"/> Job Creation/Social works	SMAMS creates opportunities for local business enabling residents to obtain jobs and services locally and offering additional choices in service providers to visitors and resident of the area
<input type="checkbox"/> Technology Transfer	
<input type="checkbox"/> Capacity Building	
<input type="checkbox"/> Local services/provisions ( <i>housing, leisure, etc.</i> )	
<input type="checkbox"/> Local produce valorisation	SMAMS organizes and manages the Ashmont/Peabody Square Farmers' Market
<input type="checkbox"/> Cultural enrichment	SMAMS participated in renovation of the historic Peabody Square Clock* SMAMS co-sponsors tree lighting festival, concerts and other
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity	SMAMS participated in renovation of the historic Peabody Square Clock*
* Other information will be in the report	

## 1.7 Private sector involvement

Source:

*In the main street is not expected this association*

- All Business enterprises are associated: ☐ if not indicate the % \_\_\_\_\_
- All merchants are associated: ☐ if not indicate the % \_\_\_\_\_
- Other private entities (non profit) ☐ if not indicate the % \_\_\_\_\_

## 1.8 Public investment programs

Source: *executive director*

Policy focus for public investment program	Description
Tax policy focus	
Fiscal policy focus	
Economic development organizations	<i>Department of Neighborhood Development, Boston Main Streets Foundation</i>
University focus	
Recruitment	
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	<i>Boston Main Streets Program, The Neighborhood Restaurant Initiative Dorchester Bay Economic Development Corporation UMss/Boston Small Business Development Center</i>
Credit Access	<i>Dorchester Bay Economic Development Corporation</i>
Local Welfare Policy	
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	<i>BRA: Dorchester Avenue Project, Community Planning Dorchester Avenue Zoning Update, Transportation Planning</i>



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

*Please, refer to Annex 1*

**2.1 Demographic data**

**2.2 Labour Market**

**2.3 Production**

### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditure

Source: 2005/2008/2009/2010/2011 990-Form

Items	Expenditure (\$)		Total (most relevant year)	Total (last year)
	Public	Private		
General & administrative	10898\$ 2004, 15798\$ 2007		28040 \$ 2008	
Social services				
Capital improvements				
Streetscape/sidewalk maintenance and repair	5000\$ 2007 526\$ 2008			
Graffiti removal				
Beautification & Horticulture	26569\$ 2004			
Holiday lighting				
Sanitation				
Security	4321\$ 2007			
Marketing, communication special events and tourism	442\$ 2007 694\$ 2008 588\$ 2009			
Education	224\$ 2004			
Job creation initiative	250\$ 2004			
Resident initiative	1029\$ 2004 4622\$ 2007 5225\$ 2010			
Other STOREFRONTS	57975\$	418618\$		
<i>Total</i>				

#### 3.2 Source of revenue

Source: 2005/2008/2009/2010/2011 990-Form /executive director

Items	revenue (\$)		Total (most relevant year)	Total (last year)
	Public	Private		
Program service revenue	32760, 40665, 70219, 57414, 58656		2004, 2007, 2008, 2009, 2010	
Special contracts				
Investment income	14641, 27054, 27191		2008, 2009, 2010	
Fundraising & special events	4622, 16186, 19518, 11692 15000		2007, 2008, 2009, 2010	FY ending 6/30/2011
Government Grants	30000			FY ending 6/30/2011
Private contributions (auto-taxation)	55000			FY ending 6/30/2011
Interest				
Assessment (fee or levy)				
Rental income				
Other				
<i>Total</i>				

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

Source: executive director

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	Recruiting	n/a	✓	
Creation of new business (start-ups)	Help with zoning/permits	n/a	✓	✓
Retention of business	Marketing	n/a	✓	✓
Assistance weak business	Marketing, referrals for financial and business advice	n/a	✓	

### 4.2 Services and improvements

Source: executive director, 990 Form

Programs	Description	Financial sources		
		Public	Private	Total
<input type="checkbox"/> Retail Enhancement				
<input type="checkbox"/> Economic Revitalization	Recruiting new businesses; Assistance on zoning and licensing issues; Referrals for business advice	✓		
<input type="checkbox"/> Security and Safety				
<input type="checkbox"/> Building Restoration/Renewal	Design and financial assistance for storefront renovations	✓	✓	
<input type="checkbox"/> Innovation/Green Technologies	Passive stormwater filtration system for Peabody Square	✓		
<input type="checkbox"/> Education and Training	Visit by the U.S. Small Business Administration and a visit, with translator, to all Vietnamese-owned businesses in district. Referrals to free/low-cost sources of business advice and individual assistance	✓	✓	
<input type="checkbox"/> Job Creation/Social works	Recruiting businesses, which provide jobs	✓		
<input type="checkbox"/> Technology Transfer				
<input type="checkbox"/> Capacity Building				
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	Participation and encouragement of Carruth Building	✓	✓	52 milion \$
<input type="checkbox"/> Local produce valorisation	Farmers' market Fridays July - October	✓	✓	
<input type="checkbox"/> Cultural enrichment	Co-sponsor tree lighting festival, concerts	✓	✓	
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity	Additional green space in Peabody Square renovations	✓	✓	
<input type="checkbox"/> Other				

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations (not partners)

Source: executive director, websites

Name	Typology (size)	Level of influence (with respect to the size of the organization)
Ashmont Adams Neighborhood Association	Civic association (all volunteers)	(High) To encourage a sense of neighborhood and community spirit and to facilitate interaction among residents. To facilitate cooperation from various government departments in order to improve services provided to the AANA neighborhood.
St. Marks Area Civic Association	Civic association (all volunteers)	(High) It is committed to working cooperatively with housing development proponents in neighborhood. It also determined to maintain the structural integrity of community and protect the property interests of neighbors.
Dorchester Community Center For The Visual Arts	Non-profit organization	(High) Artists, teachers, and community activists came together to address the lack of affordable, quality art education in Dorchester.
Ashmont Hill Association	Non-profit organization	(High) To provide a forum to enhance the quality of life in and around Dorchester's historic Ashmont Hill neighborhood by fostering a strong sense of community among all residents

### 5.2 Local elected official and community board members

Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for.

Source: executive director

Name	Elected/member	Political role
James Brett	Elected Advisory Councillor	New England Councillor
James W. Hunt	Elected Advisory Councillor	Groundwater Trust member City of Boston
Earl Taylor	Elected Advisory Councillor	Member of Dorchester Historical Society
DAN LARNER		Executive director
LISA O'N EILL		President
THOMAS CARROLL		Vice President
JAMES BUCKLEY		Clerk
KEVIN BRONSKI		Director
JOHN CUNNINGHAM		Director
STEPHEN DATISH		Director
CHRISTOPHER DOUGLASS		Director
JEFFREY GONYEAU		Director
KAREN HENRY-GARRETT		Director
IDA KALLMAN		Director
ROSE MCMULLIN		Director

### 5.3 Owners/tenants

*Source: executive director*

Typology	Number
Commercial property owners	60
Industrial property owners	4
Commercial Tenants	80
Resident owners	n/a
Community organizations	5

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

Source: webgis city of Boston <http://www.cityofboston.gov/assessing/search/>

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>
Housing (1 to 3 family residential)	385	390	385	810	N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)	486	465	486	990	N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)	705	600	988	1400	N.A.	N.A.	1	*
Residential/Commercial**	468	550	468	1300	N.A.	N.A.	N.A.	N.A.
Commerce	653	320	640	585	11 units	640	3 units	800
Industry	690	130	690	340	N.A.	N.A.	N.A.	N.A.
Advanced services sector	-	-	-	-	N.A.	N.A.	N.A.	N.A.
Parking	-	-	-	-	N.A.	N.A.	*	*

\*The Carruth building includes 74 affordable rental units and 42 market-rate condominiums on six floors, as well as 80 underground parking spaces. All of the rental units will be available to households earning no more than 60% of the area median income, which is \$40,380 for a two-person household in Boston. In addition, eight of those units will be rented to households earning no more than 30% of the area median income, which is \$20,200. As a condition of the ground lease with the MBTA, all the rental units will remain affordable for the lease's 85-year term.

\*\* This typology is present in webgis

### 6.2 Average Market Value

Source: webgis city of Boston <http://www.cityofboston.gov/assessing/search/>

Typology	Before the initiative (Year)	After the initiative (Year)
Housing (1 to 3 family residential)	390	810
Housing (4 to 6 family residential)	465	990
Housing (7 or more family residential, condominium)	600	1400
Residential/Commercial	550	1300
Commerce	320	585
Industry	130	340
Advanced services sector	-	-
Parking	-	-

### 6.3 Commerce and advanced services sectors

Source: website/Field work

Typology	Units	Renovated Buildings		New Buildings	
		sqm	sqm	sqm	sqm
Mall	-	N.A.	N.A.	N.A.	N.A.
Farmer market	1	N.A.	N.A.	N.A.	N.A.
Small retail	130	N.A.	N.A.	N.A.	N.A.
Handcrafts	-	N.A.	N.A.	N.A.	N.A.
Business financial	1	N.A.	N.A.	N.A.	N.A.
Administration buildings	-	N.A.	N.A.	N.A.	N.A.
Insurance	-	N.A.	N.A.	N.A.	N.A.
Restaurants	8	N.A.	N.A.	N.A.	N.A.
B&B	-	N.A.	N.A.	N.A.	N.A.
Hotel	-	N.A.	N.A.	N.A.	N.A.
Cinema	-	N.A.	N.A.	N.A.	N.A.
Museum	-	N.A.	N.A.	N.A.	N.A.
Theatres	-	N.A.	N.A.	N.A.	N.A.
Universities / campus	-	N.A.	N.A.	N.A.	N.A.

### 6.4 Community facilities

Source: website/Field work

Typology	Units	Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after district (sqm or number)
		Private	public	private	public	
Schools	1	N.A.	N.A.	N.A.	N.A.	N.A.
Public libraries	-	N.A.	N.A.	N.A.	N.A.	N.A.
Post office	-	N.A.	N.A.	N.A.	N.A.	N.A.
Hospital	-	N.A.	N.A.	N.A.	N.A.	N.A.
Safety Security	-	N.A.	N.A.	N.A.	N.A.	N.A.
Job center	1	N.A.	N.A.	N.A.	N.A.	N.A.
Public park	1	N.A.	N.A.	N.A.	N.A.	N.A.
Train Station	1 (MBTA Red Line)	N.A.	N.A.	N.A.	N.A.	N.A.
Bus station	1	N.A.	N.A.	N.A.	N.A.	N.A.
Bike car sharing service	-	N.A.	N.A.	N.A.	N.A.	N.A.
Housing	45	N.A.	N.A.	1*	1*	N.A.

\*Carruth Building

## 6.5 Accessibility

Source: webgis MBTA

Distance from Central Boston	Average Time	Average Km
By subway	24 minutes	10
By bus	62 minutes (there aren't direct bus line) (2 bus)	13
By car	19 minutes	13
By rail	there is no railway line	-

## 6.6 Supply chain: supply of local products

Source: executive director\*

Products	Supplier (origin)	Distance from the area
Foods	Multiple	Local to worldwide
Handcrafts	Multiple	Local to worldwide
Others	Multiple	Local to worldwide

\*The market is located on the plaza in front of Ashmont T station, at the corner of Ashmont Street and Dorchester Avenue, farmers and vendors include Spring Brook Farm of Littleton, Langwater Farm of North Easton, Dorchesters own Cedar Grove Gardens, Dorchester Arts Collaborative, and Dot2Dot Cafe.

The market, running every Friday 3 to 7 PM through mid-October, accepts SNAP/Food Stamp benefits, WIC and Senior Nutrition coupons. And SNAP shoppers can get up to \$20 worth of veggies at half price through the Boston Bounty Bucks program.

## 6.7 Environmental data

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N.A.	N.A.	N.A.
Ratio of green space to built-up area	N.A.	N.A.	N.A.
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	N.A.	N.A.	N.A.
% use of space over 24 hours	N.A.	N.A.	N.A.
Density level per square metre of scheme	N.A.	N.A.	N.A.
% of recycled material used in the built environment	N.A.	N.A.	N.A.
% of non-renewable resources consumed in current scheme	N.A.	N.A.	N.A.
LEEDs, green building initiatives undertaken ( <a href="http://www.usgbc.org">www.usgbc.org</a> )	N.A.	N.A.	N.A.
Energy efficiency measures undertaken	N.A.	N.A.	N.A.
Other environmental indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.8 Social data

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N.A.	N.A.	N.A.
Social service personnel per 1,000 population	N.A.	N.A.	N.A.
Occupancy levels in residential area (voids and vacant properties)	N.A.	N.A.	N.A.
% of hospital recovery	N.A.	N.A.	N.A.
Other social indicators specifically applied to the initiative	N.A.	N.A.	N.A.

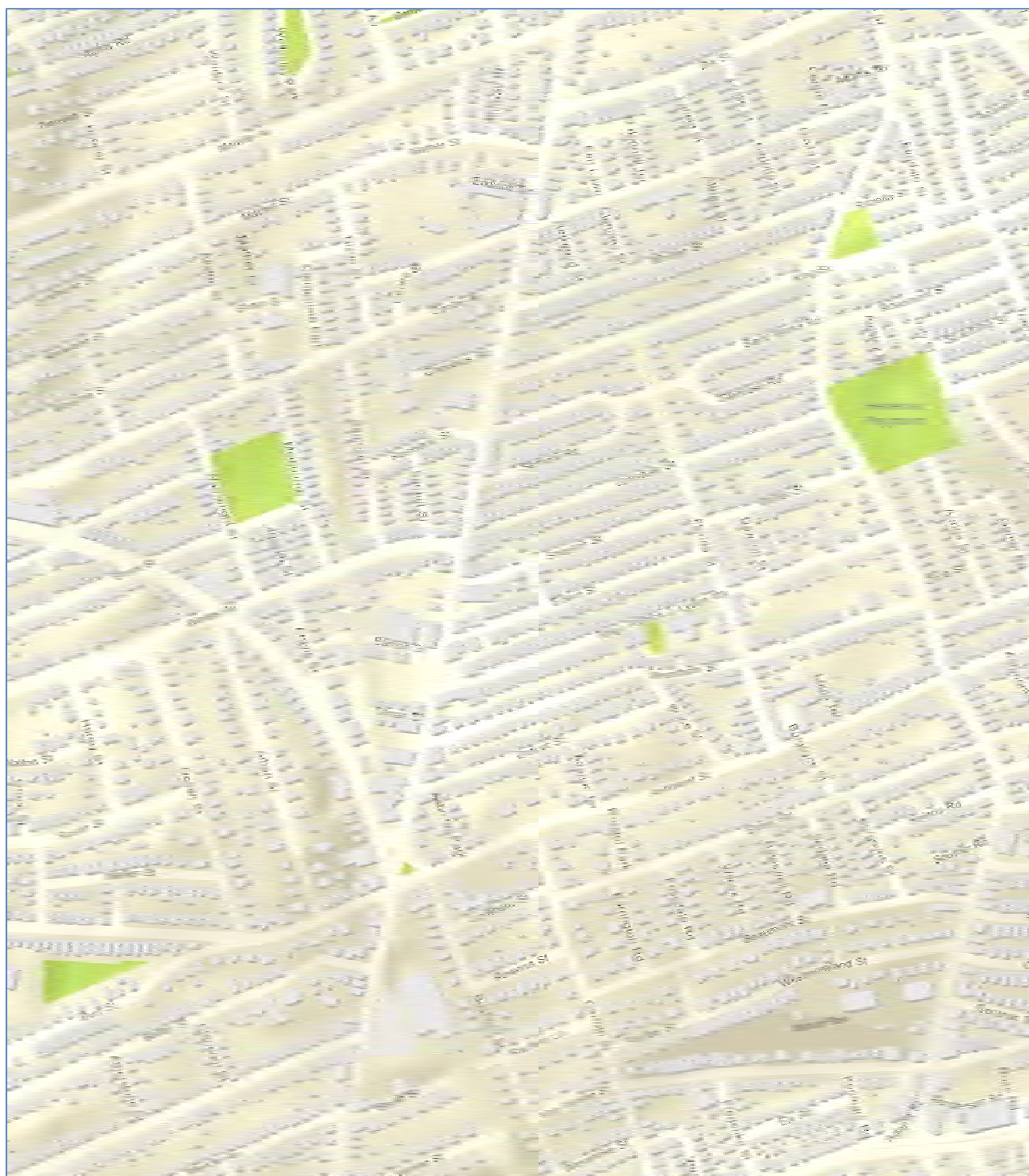
## 6.9 Geographical information (GIS based)

Source: Office of Geographic Information (MassGIS), Commonwealth of Massachusetts Information Technology Division

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis

## 7 VII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



### 7.2 Pictures

*At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.*



**Picture n.1**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.13 am*

*Notes:*

*Complete reconstruction  
of the  
MBTA's  
Ashmont/Peabody Square  
Rcd Line Station.*

*Investment:  
\$57 million.*



**Picture n.2**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.17 am*

*Notes:*

*Redesign/reconstruction  
of Peabody Square –  
increased safety for  
pedestrians and drivers,  
additional greenspace,  
and a pilot "green  
streets" stormwater  
pollution control system.*

*Investment: \$2.5 million*





**Picture n.3**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.19 am*

*Notes:*

*The Carruth Building at  
Ashmont Peabody Square  
Station.*

*A Transit-Oriented  
Development  
project hosting a bank,  
restaurant,  
gourmet coffee shop,  
several other  
businesses, and 116  
housing units.  
Investment \$52 million.*



**Picture n.4**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.22 am*

*Notes:*

*Outside of Main Street  
Office*

*In Carruth Building*





**Picture n.5**

Date: 02/10/2012

Day of the week:

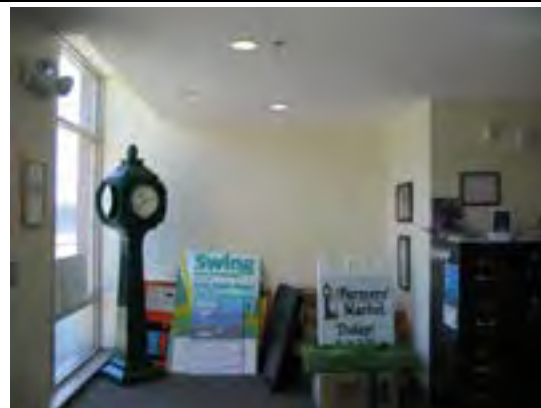
Friday

Time: 10.28 am

Notes:

Inside of Main Street  
Office

In Carruth Building  
and accomplishments



**Picture n.6**

Date: 03/18/2012

Day of the week:

Friday

Time: 18.37 am

Notes:

Bus Station in  
Ashmont





**Picture n.7**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.37 am*

*Notes:*

*Recurring type of multi-family dwellings*



**Picture n.8**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.47am*

*Notes:*

*Recurring type of Business*





**Picture n.9**

*Date: 02/10/2012*

*Day of the week: Friday*

*Time: 10.53 am*

*Notes:*

*Recurring type of  
Business*



**Picture n.10**

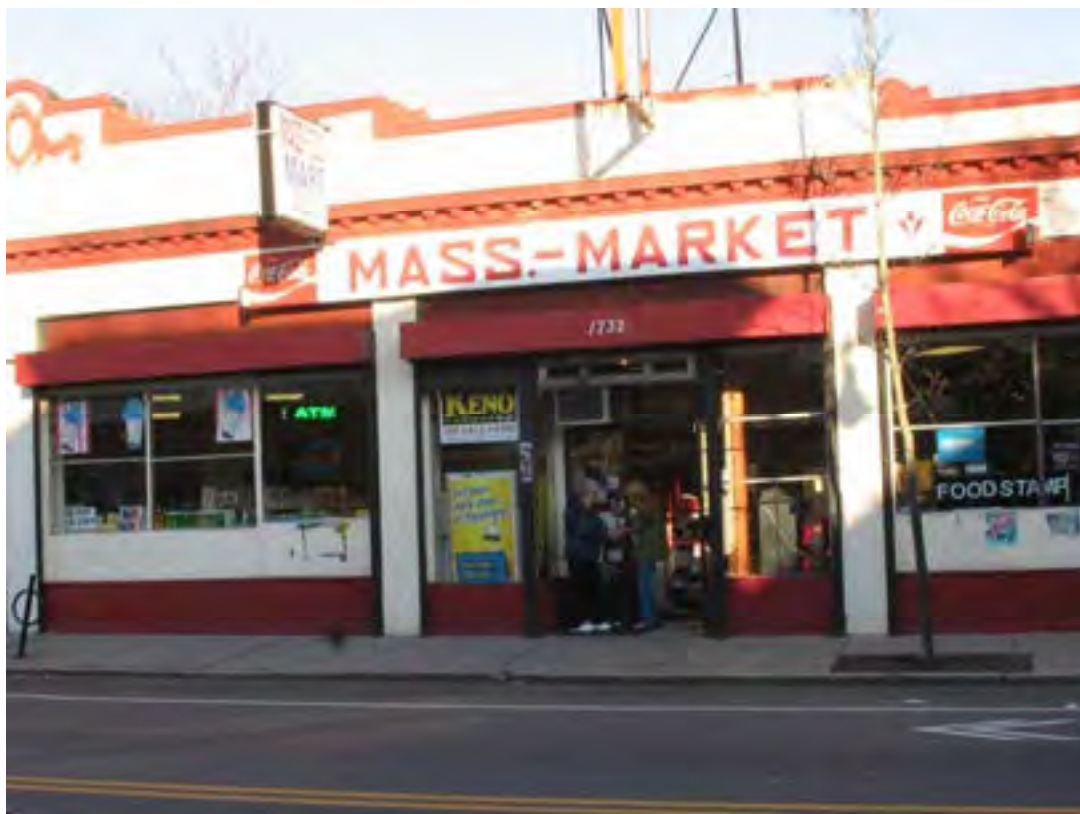
*Date: 03/18/2012*

*Day of the week: Friday*

*Time: 17.54 am*

*Notes:*

*Recurring type of  
Business*





**Picture n.11**

*Date: 03/17/2012*

*Day of the week: Friday*

*Time: 17.39 am*

*Notes:*

*Ashmont*

*Grill opened in 2005, in  
Peabody Square*



**Picture n.12**

*Date: 03/17/2012*

*Day of the week: Friday*

*Time: 17.39 am*

*Notes:*

*Tavolo Ristorante  
opened in 2006, in  
Peabody Square, in  
Carruth Building*



**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study** (denomination): **CSNDC - Codman Square Neighbourhood Development Corporation**

**Researchers:** Samuel Wapwera, Audrey Schultz and Claudia Trillo

## Survey Form

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\*Major sources for this are: 1. 2008-2009 Annual report  
2. 2010-2011 Annual report  
3. Fairmount Square Growth Corridor Vision  
4. Reports Publications and printable forms Archive (CSNDC, 2011)  
5. CSNDC 990 Form 2009

# 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

## 1.1 General Information

Classification	<input type="checkbox"/> BID: Business Improvement District		
	<input checked="" type="checkbox"/> CDC: Community Development Corporation		
	<input type="checkbox"/> SE: Social Enterprise		
	<input type="checkbox"/> MS: No profit organization for implementing the Main Street federal initiative		
	<input type="checkbox"/> NPCBPO: No Profit Community-Based Planning Organization other than CDC, SE, MS		
Location	Neighbourhood	Codman Square and South Dorchester	
	ZIP Code	02124	
	City	Dorchester	
	County	Suffolk County	
	State	MA	
Start-up Source: CSNDC News Page - Website	Year	1981-2011 Assessed 20 February 2012, [on-line] <a href="http://csndc.com/newsdetail.php?NewsID=36">http://csndc.com/newsdetail.php?NewsID=36</a> Turned 30 on 6 October 2011	
Years in operation Source: .....	Year	30 years	
Numbers of renewal Source: .....	Year	N/A	
Dimension Source: 30 <sup>th</sup> Annual Report 2010-2011	Area (sq.Km)	CSNDC serves a 5.18 Square Kilometres/2 Square mile area of Dorchester that is bounded by Columba Road & Geneva Avenue North, Gallivan Boulevard and Morton Street to the south, Blue Hill Avenue to the west, and Dorchester Avenue to east	
	Residents	44,543	
Partnership Typology Source:	<input type="checkbox"/> GP (general partnership)		Specify:
	<input type="checkbox"/> LP (limited partnership)		Specify:
	<input type="checkbox"/> LLP (limited liability partnership)		Specify:
	<input checked="" type="checkbox"/> Non Profit Corporation		Specify: Community Development Corporation
Partnership composition Source: ..... N/A (single non profit)	Name	Public/Private/NGO	% Initial Capital Invested
			N/A
Number of board directors Source: 30 <sup>th</sup> Annual Report 2010-2011	12		

## 1.2 Abstract of the initiative

(Source/s: Source/s: mydorchester.org/csndc or <http://csndc.com>, 30<sup>th</sup> Annual Report 2010-2011, accessed 10 February 2012)

The case study in brief (What is the case study, max 15 rows)

- ✚ CSNDC is a Non-Profit Community Development Corporation (CDC) that was founded in October 1981 by community activists, many of whom still reside in the neighborhood.
- ✚ The mission of the Codman Square Neighborhood Development Corporation (the “NDC”) is to build a better, stronger community in Codman Square and South Dorchester by creating housing and commercial spaces that are safe, sustainable, and affordable, promoting financial and economic stability for residents and for the neighborhood, and providing residents of all ages with opportunities and skills to empower themselves to improve their lives.

The Challenge (Why the case is worth discussing, max 5 rows)

- ✚ Some redevelopment plans were affected by the condo crash and in 2007 financing for housing came to a halt and the failing housing market affected financing, production and sales of local affordable housing.
- ✚ CSNDC supports over 137 resident leaders.
- ✚ Economic development helps in preserving assets and wealth.
- ✚ CSNDC is involved in resident resource organization and development.

The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)

- ✚ CDNDC collaborates with many private-public partnership example would be the Fairmount/Indigo Line, Smart Growth Corridor that is discussed in the report and interview form.
- ✚ Investment in many projects and initiatives such as the Dorchester backyard projects that would see the competition of the Elm Hurst street childrens park (Green initiative).
- ✚ Ensuring cleanliness and safety of Codman Square and surrounding neighborhood.
- ✚ Involvement in ensuring that crime and safety is a majority priority.
- ✚ Involvement in youth programs is also of high significance to them.
- ✚ Working support many vacant lots and urban ecology institute (UEI)-green space.
- ✚ Involvement in neighborhood network Centre i.e. The Washington Columbia II apartment, provide opportunity.
- ✚ Rental housing developments is one of the strategies of getting the community to partner with CSNDC.
- ✚ The foreclosure crisis affects the economic development and training for people in their service area is a priority.

The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)

The strategies include;

- ✚ The Fairmount transit-oriented development strategy to develop retail/commercial spaces in 4-Corners, also green space corridor along the Fairmount/Indigo T line.
- ✚ Real estate acquisition with the goal of development, mixed used urban village concept
- ✚ Proposed new stops on the Fairmount/Indigo Line.
- ✚ Working closely with 3 abutting sister CDC's – Dorchester Bay Economic Development Corporation, Mattapan Community Development Corporation, Southwest Boston Community Development Corporation.
- ✚ Acquiring land and building around the line for development (TOD).
- ✚ Strategic acquisition of specific sites.
- ✚ Undertaking both transit-oriented development (TOD) and non-TOD projects in CSNDC service area.
- ✚ Prioritization of TOD for affordable housing work.
- ✚ Preservation of community assets and wealth through addressing the foreclosure crisis.

## 1.3 Map (to be drawn from the general GIS)

(Source: see the general GIS)



## 1.4 Budget size

(Source: CSNDC 30<sup>th</sup> Anniversary Annual Report, 2010-2011 and Form 990)

Expenditure	\$ 8,144,199	CSNDC 30 <sup>th</sup> Anniversary Annual Report, 2010-2011
Revenue	\$ 8,916,339	CSNDC 30 <sup>th</sup> Anniversary Annual Report, 2010-2011
Total Budget	\$ see 990 form	Form 990 has all 2009 revenue/expenses

\*corps revolving loan-fund which leverage \$5,058,488 from conventional lenders

\*\* total investment in community is \$5,370, 603

\*\*\* the organisation has generated \$8.5 billion in reinvestment.

## 1.5 Vacancy rate

(Source: U.S. Census, 2010, MyNeighborhood Census Viewer,  
<http://hubmap.cityofboston.gov/MyNeighborhood> accessed 2/212 on-line)

Vacancy	%	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm)	N/A	N/A	N/A
Vacant housing property (sqm)	9.2 %	N/A	N/A
Vacant land (sqm)	N/A	N/A	N/A

## 1.6 Strategic Priorities

(Source: .....)

Priorities	Description
XRetail Enhancement	There are a number of efforts towards providing rental enhancement under the Codman square development. 35 new affordable rental units were added to the vacant portions of the school building and the gym and auditorium. Also 24 affordable rental units at Leverado building (245 Talbot avenue and Mallard avenue).
XEconomic Revitalization	Transit lines (bus and T) will give the community access to more jobs and services (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
XSecurity and Safety	The Fairmont Line Initiative and the Fairmont Equity Transportation Initiative both deal with security and Safety
X Building Restoration/Renewal	Acquisition of land and building around the line for development (TOD) and rehabilitation at the heart of the real estate development. Also the expansion and construction of housing along the line.
X Innovation/Green Technologies	Lead poison preventing, renewable energy resources, sustainable site planning.
X Education and Training	Educational programs
X Job Creation/Social works	Job training
<input type="checkbox"/> Technology Transfer	N/A
<input type="checkbox"/> Capacity Building	N/A
X Local services/provisions (housing, leisure, etc.)	35 new affordable rental units were added to those in the vacant portion, and housing for the elderly, housing for the homeless.

X Local produce valorisation	<b>New project “Made in Codman” (informal interview with Marcos, 7<sup>th</sup> Feb 2012)</b>
<input type="checkbox"/> Local enrichment	
X ...Natural Beauty, Green Space and biodiversity	<b>Levedo sustainable development (Green design and construction that meets LEED standards- revitalisation of vacant lots on a prominent corner, 100%.</b>

## 1.7 Partnership characteristics

(Source: .....)

### Private sector:

All Business enterprises are associated: ☐ if not indicate the % \_\_\_\_\_

All merchants are associated: ☐ if not indicate the % \_\_\_\_\_

### Public sector: (Source: interviews)

Policy focus for public investment program	Description
Tax policy focus	Low income tax credit program for affordable housing (Interview with Gail Latimore 7 <sup>th</sup> Feb 2012)
Fiscal policy focus	N/A (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Economic development organizations	They do financial literacy (they train to understand finance); they do credit counselling; they do small businesses support (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
University focus	They work with the Boston University in marketing and community initiative called Millennium Ten (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Recruitment	N/A (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	N/A (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Credit Access	They partner with banks to help people access credit for mortgages and rent (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Local Welfare Policy	N/A (interview with Marcos Beleche 8 <sup>th</sup> Feb 2012)
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	Smart Growth policy (desk analysis on planning documents)



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

### **2.1 Demographic and housing characteristics**

Refer to Seperate Form in file for Codman Square NDC.

### **2.2 Labor Market**

Refer to Seperate Form in file for Codman Square NDC.

### **2.3 Overall socioeconomic data**

## **3 REFER TO SEPERATE FORM IN FILE FOR CODMAN SQUARE NDC.**

### III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

2009 – 990 Form: Public Support = \$26,703,586

2009 – 990 Form: Private Support = \$968,898

2009 - 98.01% From Public Support

2008 – 98.65% From Public Support

(Source: 2009 – 990 Form & CSNDC 30<sup>th</sup> Anniversary Annual Report, 2010-2011 and interview with Marcos Belleche for the interpretation of the item of expenditures 8<sup>th</sup> Feb 2012) There is not a definite separation of whether it is public or private funding per client – they could not share everything with us.

Items	Year	Expenditure (\$)		Total
		Public	Private	8.144.199
General & administrative Management and administration: 17% Economic development (staffing) 5%	2010	22%		
Social services				
Capital improvements (real estate development)	2010	29%		
Streetscape/ sidewalk maintenance and repair				
Graffiti removal				
Beautification & Horticulture				
Holiday lighting				
Sanitation				
Security				
Marketing, communication special events and tourism				
Education Resident services (working with resident organisation departments) 24% Neighbourhood stabilization (foreclosure counselling; credit counselling; financial training) 25%	2010	49%		
Job creation initiative				
Other				

#### 3.2 Source of revenue

(Source: CSNDC 30<sup>th</sup> Anniversary Annual Report, 2010-2011 and interview with Marcos Belleche for the interpretation of the item of expenditures 8<sup>th</sup> Feb 2012)

Items	Year	Revenue (\$)
Program service revenue (2009-990 Form = \$1,387,525) Management Fees, Developer Fees, Interest on N/R, Staff Cost Reimbursements and Resident Service Fees)		8.916.399
Special contracts		
Investment income (2009-990 Form = \$33,021)		
Fundraising & special events (Related parties revenue) \$23,813 (2009-990 Form)	2010	12%
Government Grants	2010	3%
Private contributions (2009-990 Form \$1,397,749)	2010	16%
Interest		

Assessment (fee or levy)		
Rental income (2009-990 Form) Gross Rent \$902,492; Rental Expenses - \$27,676 = \$874,816 Rental Income	2010	67%
Other – Revenue = \$1,126,735, (2009-990 Form)	2010	2%

#### 4 IV SECTION: MARKETING AND PROMOTION

##### 4.1 Business attraction, creation, retention and assistance programs

(Source: 990 for 2009, most current available to us)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area – this was mentioned in an interview but they can not give us exact amounts of receipt from each Tax credit grant.	Tax credit programs (Interview with Gail Latimore 7 <sup>th</sup> Feb 2012 2.7)		\$100,000	\$5,000,000
Creation of new business (start-ups)	Made in Codman (interview with Marcos 8 <sup>th</sup> Feb 2012 2.7)	1	Funding has been allocated yet, working with Boston University – for free – to come up with potential cost	N/A
Retention of business	N/A	N/A	N/A	N/A
Assistance weak business	N/A	N/A	N/A	N/A

##### 4.2 Services and improvements

(Source: interview with Marcos Belleche, 8<sup>th</sup> Feb 2012) There is no real definition of

Programs	Description	Item	Financial sources	
			Public	Private
<input type="checkbox"/> Retail Enhancement	N/A			
<input type="checkbox"/> Economic Revitalization	N/A			
<input type="checkbox"/> Security and Safety	N/A			
X Building Restoration/Renewal	Development of new facilities and housing. Renovation of old buildings.	Several	Expenses \$385,810	Revenue \$449,957 2009-990 Form
<input type="checkbox"/> Innovation/Green Technologies	N/A			
X Education and Training	Many programs: foreclosure counselling, credit counselling, small businesses support, financial literacy	Several		
X Job Creation/Social works	Youth programs, Case management, referrals (they refer people to	Several		

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.

	<b>different project for housing)</b>			
<input type="checkbox"/> Technology Transfer	<b>N/A</b>			
<input type="checkbox"/> Capacity Building	<b>N/A</b>			
<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	<b>Providing residents with affordable housing for rent</b>	<b>Several</b>		
<input checked="" type="checkbox"/> Local produce valorisation	<b>Future initiative</b>			
<input type="checkbox"/> Cultural enrichment	<b>N/A</b>			
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity	<b>N/A</b>			

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations

(Source: <http://www.csndc.com>, 11<sup>th</sup> February 2012)

Name	Typology (size)	Level of influence (with respect the size of the organization)
<p> Alternatives for Community &amp; the Environment  Armandine Street Crime Watch  Ashmont Hill Neighborhood Association  Aspinwall Road Neighborhood Association  Boston Homeowners Services Collaborative  Boston Loan and Equity Fund  Boston Police Department Area B-3  Boston Police Department Area C-11  Boston Police Department B-2  Boston Redevelopment Authority  Boston Tenants Coalition  Boston Votes / Mass Votes  C Circle Plus Neighborhood Association  Chamberlain Neighborhood Association  Citizens Life / Vida Urbana  Codman Square Health Center  Codman Square Library  Codman Square Merchants Association  Codman Square Neighborhood Council  Courthouse Liaison Committee  Dorchester Bay Economic Development Corporation  Dorchester Community Services Collaborative  Dorchester Environmental Health Coalition  Dorchester Family YMCA  Dorchester Housing &amp; Open Space Action Team  Elmhurst Street Neighborhood Association (now TNT)  Epiphany School  Erie/Ellington Neighborhood Association  Fairmount/Indigo Coalition  Fairmount/Indigo CDC Collaborative  Federated Dorchester Neighborhood Houses  Four Corners Action Coalition  Four Corners Main Street Program  Friends of Elmhurst Park  Friends of Spencer/Whitfield Park  Global Ministries  Greater Boston Interfaith Organization  Great Four Corners Action Coalition  Harvard/Wales Neighborhood Group  Kit Clark Senior Services  Mattapan Community Development Corporation  Melville Park Neighborhood Association  Mass Association of Community Development Corporations  Nuestra Comunidad Community Development Corporation </p>		

Pasadena/Supple Road Neighborhood Association  
 St. Marks Civic Association  
 STRIVE  
 Shawmut United Neighbors  
 Spencer Street Neighborhood Association  
 Southwest Boston Community Development Corporation  
 Talbot Bernard Resident Association  
 Talbot Norfolk Triangle Group Neighborhood United  
 Thetford Evans Park Association  
 Thetford Street Resident Association  
 Tremont Credit Union  
 Whitfield Wheatland Aspinwall Rosedale Dunlap Association

## 5.2 Local elected official and community board members

(Source: <http://www.csndc.com>, 11<sup>th</sup> February 2012)

Name	Elected/member	Political role
Nathan Cooper - Co-Chair	Elected member	University of Massachusetts
Kenan Bigby - Co Chair	Elected member	Trinity Financial
Shirley Young	Elected member	Boston Private Bank
Wilena Julien - Treasurer	Elected member	Area B-2 Police Station
Lisa Haskins	Elected member	Boston Public Schools
Coleen Kay Walker - Clerk	Elected member	Business Owner
Melvin Vieira Jr.	Elected member	Real Estate Agent
Olin Latimore	Elected member	Tufts-NE Medical Center
Julie Taylor	Elected member	Noble & Wickersham LLP
Alice Nelson	Elected member	NarrowWay Plumbing
Ivelisse Jimenez	Elected member	Community Activist
India McConnico	Elected member	Resident

## 5.3 Owners/tenants

(Source: interview with Marcos Belleche, 8<sup>th</sup> Feb 2012)

Typology	Number
Commercial property owners	<b>80</b>
Industrial property owners	<b>None</b>
Commercial Tenants	<b>8</b>
Resident owners	<b>812</b>
Community organizations	<b>None</b>

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate (N/A)

(Source: .....)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Housing						
Commerce						
Industry						
Advanced services sector						
Parking						

### 6.2 Average Market Value

(Source: .....)

Typology	Before the initiative (Year)	After the initiative (Year)
Housing		
Commerce		
Industry		
Advanced services sector		
Parking		

### 6.3 Commerce and advanced services sectors (N/A)

(Source: .....)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Mall	N/A	N/A				
Farmer market	N/A	N/A				
Small retail	N/A	N/A				
Handcrafts	N/A	N/A				
Business financial	N/A	N/A				
Administration buildings	N/A	N/A				
Insurance	N/A	N/A				
Restaurants	N/A	N/A				
B&B	N/A	N/A				
Hotel	N/A	N/A				
Cinema	N/A	N/A				
Museum	N/A	N/A				
Theatres	N/A	N/A				
Universities / campus	N/A	N/A				

## 6.4 Community facilities

(Source: .....)

Typology	Total (sqm or number)		Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after project (sqm or number)
	private	public	Private	public	private	public	
Schools	N/A	N/A					
Public libraries	N/A	N/A					
Post office	N/A	N/A					
Hospital	N/A	N/A					
Safety Security	N/A	N/A					
Job center	N/A	N/A					
Public park	N/A	N/A					
Train Station	N/A	N/A					
Bus station	N/A	N/A					
Bike car sharing service	N/A	N/A					
Housing	????	????					

## 6.5 Accessibility

(Source: GIS)

Distance from Central Boston	Time	Km
By subway	Alessia	Alessia
By bus	Alessia	Alessia
By car	Alessia	Alessia
By rail	Alessia	Alessia

Please refer to the GIS centroid developed by the GIS/ map group

## 6.6 Supply chain: the supply of local products

Please note that the supply chain has to be managed by the initiative as a whole (i.e. the BID, the CDC...) and not by the individual retailer or other company

(Source:.....)

Products	Supplier (origin)	Distance from the area
Foods		
Handcrafts		
Others		

The CSNDC is currently developing a project aimed at supporting local production of food (urban agriculture), which will be followed by a program aimed at selling these products to local supermarkets/ restaurant (direct supply chain inside the neighbourhood). Time: 2 years from now

## 6.7 Environmental data (N/A)

(Source: .....)

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter			
Ratio of green space to urban form			
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme			
% use of space over 24 hours			

Density level per square metre of scheme			
% of recycled material used in the built environment			
% of non-renewable resources consumed in current scheme			
LEEDs, green building initiatives undertaken			
Energy efficiency measures undertaken			
Other environmental indicators specifically applied to the initiative			

## 6.8 Social data (N/A)

(Source: .....)

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate			
Social service personnel per 1,000 population			
Occupancy levels in residential area (voids and vacant properties)		Vacancy rate 9.2%	
% of hospital recovery	N/A		
Other social indicators specifically applied to the initiative			

## 6.9 Geographical information (GIS based)

(Source: GIS – please liaise with Anna and Alessia and **double check**)

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Future initiative Fairmont corridor
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis

**7 VIII SECTION: VISUAL ANALYSIS****7.1 Map with view points (please put in order the map with Anna)****7.2 Pictures**

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

**Picture n.1****Date: 7<sup>th</sup> February 12****Day of the week Tuesday****Time 12 pm****Notes: the residents are mainly black Caribbean (i.e. Haiti). In the area you can find many shops of typical products from that area****Picture n.2****Date: 7<sup>th</sup> February 12****Day of the week Tuesday****Time 12 pm****Notes: as above****Picture n.3****Date: 7<sup>th</sup> February 12****Day of the week Tuesday****Time 12 pm****Notes: as above****Picture n.4****Date: 7<sup>th</sup> February 12****Day of the week Tuesday****Time 12 pm****Notes: as above****Picture n.5****Date: 7<sup>th</sup> February 12**



**Day of the week Tuesday**

**Time 12 pm**

**Notes: as above**

**Picture n.6**

**Date: 7<sup>th</sup> February 12**

**Day of the week Tuesday**

**Time 12 pm**

**Notes: office of the CSNDC in the heart of the neighbourhood (close to Codman Sq.)**

**Picture n.7**

**Date: 7<sup>th</sup> February 12**

**Day of the week Tuesday**

**Time 12 pm**

**Notes: housing apartments recently built by the CSNDC**

**Picture n.8**

**Date: 7<sup>th</sup> February 12**

**Day of the week Tuesday**

**Time 12 pm**

**Notes: school recently renewed by the CSNDC**

**Picture n.9**

**Date: 7<sup>th</sup> February 12**

**Day of the week Tuesday**

**Time 12 pm**

**Notes: conference room in the CSNDC office (charrette done with the residents)**

**Picture n.10**

**Date: 7<sup>th</sup> February 12**

**Day of the week Tuesday**

**Time 12 pm**

**Notes: area that still needs to be renewed**

**Picture n.11**

**Date: 8<sup>th</sup> February 12**

**Day of the week Wednesday**

**Time 12 pm**

**Notes: community gardens**

**Picture n.12**

**Date: 7<sup>th</sup> February 12**

**Day of the week Wednesday**

**Time 12 pm**

**Notes: Codman Sq. (in the back: old heritage building renovated by the CSNDC)**



**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study** (denomination):

**Researcher:**

## Survey Form

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# 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

## 1.1 General Information

ZONING CODE	General Code – Map 2A (Boston Harbor) – Article 27 Volume III (Neighborhood Districts) – Map 3A,3B,3C (East Boston) – Article 53		
Main Theme	<input type="checkbox"/> Business Improvement District <input type="checkbox"/> Community Development Corporations <input type="checkbox"/> Urban Agricultural Linkages <input type="checkbox"/> Social Enterprise <input type="checkbox"/> University-focused <input checked="" type="checkbox"/> Non-profit assistance/development <input type="checkbox"/> Business incubators		
Location	Neighbourhood	East Boston	
	ZIP Code	02128	
	City	Boston	
	County	Suffolk	
	State	Massachusetts	
Start-up Source: East Boston Main Streets, Annual report, 2011	Year	1995	
Years in operation Source: East Boston Main Streets, Annual report, 2011	Year	Up to present – 17 years	
Numbers of renewal Source:	Year	none	
Dimension Source: East Boston Main Streets, Annual report, 2011	Area (sq. Km)	0,16 sq. Km The District is centered along the Meridian Street corridor, linking Central Square with Maverick Square, and extends to adjacent blocks around the squares, including parts of Bennington Street and Sumner Street.	
	Residents	16421	
Partnership Institutional Typology	Typology		Reference by Law
	<input type="checkbox"/> BID: Business Improvement District		
	<input type="checkbox"/> PA: Public Agency		
	<input type="checkbox"/> CDC: Community Development Corporations		
	<input type="checkbox"/> SE: Social Enterprise		
	<input checked="" type="checkbox"/> NPOMS: Non Profit Organization for implementing the Main Street initiative		East Boston Gateway Inc. is a Non-Profit organization Recognized under Section 501(c)(3) of the Internal Revenue Code
	<input type="checkbox"/> NPCBPO: Non Profit Community-Based Planning Organization other than CDC, SE, MS		
Partnership composition Source: Interview EAST BOSTON	Name	Public/Private/NGO	% Initial Capital Invested
	East Boston Gateway Inc.	Non profit organization	
	City of Boston	Public	50,000
	Massport	Independent public authority	15,000



# MARIE CURIE IRSES - CLUDs PROJECT



GATEWAY INC Director Clark Moulaison, 02-21- 2012	Soverign Bank Foundation	Bank	10,000
	East Boston Savings Bank	Bank	3,000
	Local corporate sponsors (8)	private	8,000
	The above data are not based on EBMS financial documentation but on executive director C. Moulaison statements and, thus, should be considered as rough information.		
Number of board directors Source: Interview EAST BOSTON GATEWAY INC. Director Clark Moulaison, 02-21- 2012	15		

## 1.2 Abstract of the initiative

(Source/s: Interview EAST BOSTON GATEWAY INC. Director Clark Moulaison, 02-21-2012;  
East Boston Main Streets, Annual report, 2011)

### ***The case study in brief (What is the case study, max 15 rows)***

**East Boston Main Streets** is a public-private partnership initiative of Boston Main Streets.

**Boston Main Streets Program** has been established by Mayor Thomas M. Menino in 1995 as the first urban, multi-district Main Street program in the United States aimed at supporting the revitalization of Boston's commercial districts. Today the nationally recognized program boasts 19 districts across Boston.

**East Boston Main Streets** has been operating in East Boston since 1995. Its main aim is to assist local businesses by providing funding, technical assistance, façade improvements and community events coordination. Even though the initiative seems to be retail/business focused, some efforts have been done also in order to boost the social cohesion and the cultural enrichment of the area. However, given the small budget of EBMS, basically its main role appears to be that of facilitating and creating networks between local businesses and other private or public entities so as to improve the commercial district. Its mission is *"to create vibrant business districts by initiating private and public improvements, promoting commerce and supporting efforts that improve the quality of life for everyone who lives, works and does business in East Boston."*

With regard to the funding basis, this has been changing over the years. The City of Boston is the only public sponsor of EBMS, while the others are Banks, non-profit foundations and local corporations. It can be pointed out that the number of sponsors has increased over the years, broadening the funding basis of the initiative. Even though the City of Boston remains the major sponsor of EBMS, the importance of private funding has grown significantly. Indeed, while public funds pushed the start-up of the EBMS (the City of Boston paid for about 60% of the EBMS start-up), the initiative is now mainly private.

Moving to the EBMS management, EB Gateway Inc. is the non-profit organization in charge of managing the initiative. With regard to the EBMS board, it is composed mainly of local businesses and residents (about 70% of the total members). Since the beginning, the Chamber of Commerce has represented one of the most influent partners, holding two seats in the EBMS board. Other members ex-officio are the Police department, Massport and the Sovereign Bank. As for the partners supporting the initiative, EBMS collaborates regularly with many community organizations and a fundamental role is played by the 100 volunteers that help especially on events.

### ***The Challenge (Why the case worth discussing, max 5 rows)***

As a Main Streets Project, the East Boston Main Streets analysis allows to deepen one of the main retail revitalization strategy developed in US so far. Even though the kind of partnership and management implemented differ from the ones of CCN in Italy, the objectives seem to be very similar. Moreover, the peculiarity of the socio-economic context - East Boston is a multiethnic neighborhood - might help to understand the importance and/or the obstacles to implement such a kind of project in contexts characterized by a high level of immigration.

### ***The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)***

East Boston is located across the harbor from downtown Boston, close to Logan Airport. As a result of its location, it has always been an independent neighborhood, culturally and geographically distinct from the rest of the city and has a long history as a point of entry for immigrants. In particular, while in the past East Boston was home to a large Italian community, today about half of the population is Latino. This changes had a strong impact on the retail sector, that is today mostly composed by latinos retailers. This produced problems of inclusion/exclusion among native, past immigrants and new comers.

### ***The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)***

In accordance with the Main Streets "4-point approach" East Boston Main Streets maintains the following standing committees: organization (aimed at building collaborative partnerships between a broad range of groups and organizations); design (aimed at improving the physical environment of East Boston commercial district); promotion

(aimed at marketing East Boston's commercial district to neighborhood residents, investors, visitors, and others) and economic reconstructing (aimed at strengthening the existing economic base of East Boston's commercial district by helping existing business become stronger and by recruiting new businesses). Despite the existence of the 4 committees, up to now the strategy has been mainly focused on the first three points, while the 4th has been given less importance mostly as a consequence of the low vacancy rate of retail spaces and of the presence of a strong landlords market which prevent/impede East Boston Main Streets from attracting new businesses.

### 1.3 Map

(Source: .....)



## 1.4 Budget size

(sources:

\*EAST BOSTON GATEWAY INC, Profit and loss, July 2010 through June 2011, 2011, confidential document.

\*\*EAST BOSTON GATEWAY INC, Form 990-EZ 2010, 2009, 2008.

\*\*\*EAST BOSTON GATEWAY INC, Form 990, 2007)

	2011*	2010**	2009**	2008**	2007***
Expenditure \$	90,000	83,016	128,760	148,930	95,756
Revenue \$	91,000	77,769	132,400	125,008	112,864
Total Budget/NET INCOME \$	22,655	21,655	26,902	23,268	47,190
Net assets or fund balances at beginning of year	21,655	26,902	23,268	47,190	30,082

## 1.5 Vacancy rate

Source: Interviews EAST BOSTON GATEWAY INC Director Clark Moulaison, 01-25-2012 e 02-21-2012)

Vacancy	% (2011)	Percentage of change from previous year	Percentage of change from the starting point	% (2010)	% (1995)
Vacant commercial property (sqm)	3 %	+1%	-3%	2%	6%
Vacant land (sqm)	3%	No change	No change	3%	3%

Source: see annex 2.1, section 2

Vacancy	2000	%	2010	%
Vacant housing property (units)	307	5.2%	486	7%

## 1.6 Strategic Priorities

(Source: East Boston Main Streets, Annual report, 2011)

Priorities	Description
✓ Retail Enhancement	<p><b>Main Street Partners:</b> Main Street Partners is a non-profit group of young professionals dedicated to providing consultation to small businesses. During a 7 week period Main Street Partners worked with one of the local business owner (Mohammed Akram from Mehak Indian Cuisine). During that time the group developed specific marketing plans including in-store promotions and also built a website and made specific recommendations regarding façade improvements and directions on how to secure financing. As a result, the restaurant has enjoyed a 14 % increase in sales.</p> <p><b>Promotion and events</b> EBMS hosted 6 events in 2011: 1. The 15th annual Taste of Eastie, a big fundraising event that featured 26 local food</p>

	<p>establishments and was attended by more than 260 guests.</p> <p>2. A spring and fall networking breakfast to provide an opportunity for new and established businesses to introduce themselves to the community. A guest speaker provides attendees with timely information that is relevant to business and the community at large.</p> <p>3. The 11th Annual Countdown to Kindergarten parade. Through the generosity of more than 30 local businesses and in collaboration with the EBMS partners, every child starting kindergarten in East Boston receives a backpack and school supplies.</p> <p>4. EBMS supported the 2nd annual Harbor Arts Expo on the East Boston waterfront. The event featured local artists and showcased large scale outdoor sculptures from around the world.</p> <p>5. Each November, EBMS participates in Small Business Saturday.</p>
✓ Economic Revitalization	<p><b>EBMS Economic analysis and revitalization plan by the Massachusetts Institute of Technology:</b> In 2011 EBMS participated in a four month study by the MIT, aimed at developing a comprehensive revitalization plan for East Boston Main Streets.</p> <p><i>As for the MIT study recommendations, EBMS is committed to implement 3 of them: the implementation of a way finding signage; a vending cart program to connect the district above the tunnel area at Meridian/ Gove/London Streets; a block captain business cleanliness program.</i></p> <p><i>EBMS is also committed to utilizing the MIT study as an integral part of its work plan and to share the results with others who may support or consider implementing some of the recommendations themselves.</i></p>
□ Security and Safety	
✓ Building Restoration/ Renewal	<p><b>Storefront improvement project:</b> EBMS completed 9 Storefront Improvement Projects in 2011.</p> <p><b>Design committee:</b> the EBMS volunteer design committee worked to develop the scope of potential zoning projects to be (or being) undertaken in the neighborhood, by determining their willingness and ability to complete a recommended improvement.</p> <p><b>Zoning hearings and projects:</b> EBMS attended most of the neighborhood zoning hearings and supported important zoning projects such as Maverick and Central square by/through facilitating meetings, monitoring progress, ensuring quality workmanship, materials and helping to minimize negative impacts during the construction period.</p>
✓ Innovation/Green Technologies	<p>EBMS contacted forty local businesses to participate in <b>Boston Buying Power</b>, a program that offered free energy audits and grants to local businesses.  <a href="http://www.bostonbuyingpower.com/boston.html">http://www.bostonbuyingpower.com/boston.html</a></p> <p>Additionally, EBMS connected local business owners with <b>Renew Boston</b> and the <b>ABC sustainability project</b>.  <a href="http://www.renewboston.org/about/">http://www.renewboston.org/about/</a>  <a href="http://www.abettercity.org/">http://www.abettercity.org/</a></p>
□ Education and Training	
□ Job Creation/Social works	

<input type="checkbox"/> Technology Transfer	
<input type="checkbox"/> Capacity Building	
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	<p><b>Cleanliness project:</b> EBMS maintains regular contact with local business owners to ensure compliance with site cleanliness; requests regular volunteer help to participate in clean-up and beautification efforts, including a year round <b>Boston Shines initiative</b> (<a href="http://www.cityofboston.gov/ons/bostonshines/">http://www.cityofboston.gov/ons/bostonshines/</a>) and block clean-ups; coordinates regularly with the Community Response Team (CRT) to request help directly with appropriate city departments including Public Works, Parks, Police, Transportation Inspectional Services and the Mayor's office.</p> <p><i>Currently EBMS is developing a plan to enlist block captains in the business district clean-up efforts to roll out in the spring of 2012.</i></p>
<input type="checkbox"/> Local produce valorisation	
<input type="checkbox"/> Cultural enrichment	
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	
<p>EBMS regularly partners with other local organizations. Some examples from previous years:</p> <ol style="list-style-type: none"> <li>1. In 2010 EBMS and the Boston Preservation Alliance organized a historic walking tour of the Maverick and Central Squares;</li> <li>2. In 2010 EBMS, the East Boston Neighborhood Health Center and the East Boston YMCA joined to sponsor a healthy fitness walk;</li> <li>3. In 2010 EBMS promoted the police department training project in which business owners have been trained by the police about security and safety practices.</li> </ol>	

### 1.7 Private sector involvement

(Source: .....)

All Business enterprises are associated: ☐ if not indicate the %\_\_\_\_

All merchants are associated : ☐ if not indicate the %\_\_\_\_

Other private entities (no profit) ☐ if not indicate the %\_\_\_\_

Local business (mostly retailers) are the main stakeholders of the EBMS but they are not associated and membership is not required.

### 1.8 Public investment programs

(Source: Interview EAST BOSTON GATEWAY INC Director Clark Moulaison, 01-25-2012)

Policy focus for public investment program	Description
Tax policy focus	
Fiscal policy focus	
Economic development organizations	<p>EBMS partners regularly with:</p> <p>East Boston Chamber of Commerce</p> <p>City of Boston Department of Neighborhood development</p>



	<p>Neighborhood of affordable Housing</p> <p>Boston Redevelopment Authority</p> <p>Boston Preservation Alliance</p> <p>Historic Boston Inc</p>
University focus	MIT Urban Studies, Technical Assistance, Interns
Recruitment	
<p>Business Aid</p> <p><i>(Start-up, Spill Over, funding, copyright, etc.)</i></p>	<p>Technical assistance including Marketing, Finance, Design, Referral</p>
Credit Access	
Local Welfare Policy	<p>EBMS partners regularly with East Boston YMCA, Neighborhood Health Center, Social Center.</p>
<p>Urban Planning Policy</p> <p><i>(property rights, land use change, zoning, TDR, preservation, etc.)</i></p>	<p>EBMS initiates and supports public improvements by facilitating public meetings and discussions on proposals.</p> <p>Contacts appropriate city, state and federal departments for resources and information such as</p> <p>Landmarks, Board of appeals , Boston Transportation Department etc.</p>



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

### **2.1 Demographic and housing characteristics**

### **2.2 Labor Market**

### **2.3 Overall socioeconomic data**

### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

(Source: EAST BOSTON GATEWAY INC, Profit and loss, July 2010 through June 2011, 2011, confidential document)

Items Year: July 2010 to June 2011	Expenditure (\$)		
	Public	Private	Total
✓ General & administrative			Salaries and related expenses: 50,394.26 Administration and office: 16,755.77
Social services			
Capital improvements			
✓ Streetscape/ sidewalk maintenance and repair		Public Improvements Boston Main Street Foundation: 857.50	13,618
		Storefront Imp. East Boston Savings Bank Charitable: 4,843.00	
		Storefront Imp. East Boston Foundation: 7,917.50	
Graffiti removal			
Beautification & Horticulture			
Holiday lighting			
Sanitation			
Security			
✓ Marketing, communication special events and tourism			CountDown to Kindergarten (event): 285.68
			Networking breakfast: 2,487.23
			Taste of Eastie: 4,178.41
			Advertizing & Promotion: 1,432.62
✓ Education			Education and Meeting Expenses: 1,450.62
Job creation initiative			
Resident initiative			
✓ Other			Professional services fee: 5,835.59 Other: 876.67

#### 3.2 Source of revenue

(Source: EAST BOSTON GATEWAY INC, Profit and loss, July 2010 through June 2011, 2011, confidential document)

Items Year: July 2010 to June 2011	revenue (\$)		
	Public	Private	Total
Program service revenue			
Special contracts			
Investment income			



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✓ Fundraising & special events			Networking Breakfast revenue 4,345.98
		Taste of Eastie Sponsors: 5,000.00	
			Taste of Eastie Ticket Sales 4,929.46 Taste of Eastie Permits Inc. 540.00 Taste of Eastie Raffle/Auction 3,372.00
✓ Government Grants			Boston Main Street Salary Support 30,835.67 Boston Main Street Promotion 1,150.00 Boston Main Street Sustainability Support 145.15
✓ Private contributions		EBMS sponsors 48,000.00	
Interest			
Assessment (fee or levy)			
Rental income			
Other			

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

(Source: EAST BOSTON GATEWAY INC Director Clark Moulaison, 02-21-2012)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	The EBMS has not developed any program of new business attraction. The EBMS executive director M. Moulaison explained that the arrive of new businesses depends on the landlords market.			
Creation of new business (start-ups)	The EBMS has not developed any program of new business creation.			
Retention of business	All the EBMS activities are aimed at offering retention and assistance to the businesses of the area.	Total businesses in the area:195		
Assistance weak business				

### 4.2 Services and improvements

Data for this table are not available but I added below other tables with data regarding financial sources that can be useful along with data from table 3.1 regarding the expenditures.

Programs	Description	Item	Financial sources	
			Public	Private
<input type="checkbox"/> Retail Enhancement		n/a	n/a	n/a
<input type="checkbox"/> Economic Revitalization		n/a	n/a	n/a
<input type="checkbox"/> Security and Safety		n/a	n/a	n/a
<input type="checkbox"/> Building Restoration/Renewal		n/a	n/a	n/a
<input type="checkbox"/> Innovation/Green Technologies		n/a	n/a	n/a
<input type="checkbox"/> Education and Training		n/a	n/a	n/a
<input type="checkbox"/> Job Creation/Social works		n/a	n/a	n/a
<input type="checkbox"/> Technology Transfer		n/a	n/a	n/a
<input type="checkbox"/> Capacity Building		n/a	n/a	n/a
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)		n/a	n/a	n/a
<input type="checkbox"/> Local produce valorisation		n/a	n/a	n/a

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.



<input type="checkbox"/> Cultural enrichment		n/a	n/a	n/a
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity		n/a	n/a	n/a

### Financial sources EBMS 2011

(source: EAST BOSTON GATEWAY INC Director Clark Moulaison, 02-21-2012)

EBMS sponsors/financial sources	Funds 2011	%
The City of Boston	32,130.82	32.9%
The Boston Main Street's Foundation	25,000	25.6%
The East Boston Foundation	15,000	15.3%
The East Boston Savings Bank Charitable	5,000	5.1%
Soverign Bank Foundation	3,000	3.1%
Massport	3,000	3.1%
Corporate sponsors	6,345	6.5%
Self-financing	8,301.46	8.5%
<b>total</b>	<b>97,776.46</b>	<b>100%</b>

EBMS sponsors/financial sources	Funds 2003	%
The City of Boston	50,000	54.9%
Massport	3,000	3.3%
Corporate sponsors	8,000	8.8%
Soverign Bank Foundation	10,000	11.0%
The East Boston Foundation	15,000	16.5%
The East Boston Savings Bank Charitable	5,000	5.5%
<b>total</b>	<b>91,000</b>	<b>100%</b>

EBMS sponsors/financial sources	Funds 1995	%
The City of Boston	50,000	58.1%
East Boston Savings Bank	3,000	3.5%



## MARIE CURIE IRSES - **CLUDs** PROJECT



Massport	15,000	17.4%
Corporate sponsors	8,000	9.3%
Soverign Bank Foundation	10,000	11.6%
<b>total</b>	<b>86,000</b>	<b>100%</b>

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations

(Source: EAST BOSTON GATEWAY INC Director Clark Moulaison, 02-21-2012)

Name	Typology (size)	Level of influence (with respect the size of the organization)
East Boston Chamber of Commerce	Chamber of Commerce	Despite the East Boston Chamber of Commerce does not finance the EBMS, it is one of the most influent partners as it holds 2 seats in the EBMS board of directors HIGH
Boston Main Streets Foundation	Non profit foundation	Main private sponsor MEDIUM
City of Boston	Public	Main private sponsor MEDIUM

### 5.2 Local elected official and community board members

(Source: Interview EAST BOSTON GATEWAY INC. Director Clark Moulaison, 02-21-2012)

Name	Elected/member	Political role
Ann Di Maria		Chamber of Commerce - Economic Development Committe - Ex-officio
James Gleason	Resident	
Phillip Gutowski	Resident - local realtor	
David Halbert	resident - Director of Government and Community Affairs for Trans Metro Media	
Marika Mcknight	resident	
Grace Magoon		Chamber Appointee, Ex-officio, Treasurer
Dino Manca	Local business	
Albert Mangini	Resident	
Gary Marino		Boston Police Department
Michael Moscone	Local Business - East Boston Savings Bank	
Antonio Pineda		Sovereign Bank - Ex-officio
Elizabeth Tanefis	Resident - program manager at Health resources in action	
Melissa Tyler	Local Business and resident	
Arturo Velasquez	Local Business	
n/a		Massport appointee - Ex-officio

### 5.3 Owners/tenants

(Source: Interview EAST BOSTON GATEWAY INC. Director Clark Moulaison, 02-21-2012)

Typology	Number	Comments
Commercial property owners	25% of total commercial activities are run by property owners.	- The total number of commercial activities in the area is 195. - Commercial property owners and tenants are the main stakeholders of the EBMS but membership is not



		required. -In 2011, there have been 69 <u>active</u> commercial property owners/ tenants (that supported EBMS projects or/and received assistance from EBMS).
Industrial property owners	None (there are not industrial property owners in the EBMS area)	
Commercial Tenants	75% of total commercial activities are run by tenants.	
Resident owners	n/a	
Community organizations	Total number: 15 East Boston Chamber of Commerce East Boston YMCA East Boston Social Center Kiwanis Club of East Boston East Boston Head Start NOAH East Boston Little Folks Boston Police Department MBTA Suffolk County Sheriff's Department East Boston District Court East Boston APAC Piers Park Sailing Center Zumix East Boston Post Office	About 100 volunteers support EBMS (of whose about 75% are residents and 25% are business owners)

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

Source: City of Boston, <http://www.cityofboston.gov/assessing/search/?q=>

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>
Housing (1 to 3 family residential)		748.7213		1789.169	N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)		1177.923		2897.028	N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)		481.0562		1814.883	N.A.	N.A.	N.A.	N.A.
Commerce		N.A.		N.A.	N.A.	N.A.	N.A.	N.A.
Industry		N.A.		N.A.	N.A.	N.A.	N.A.	N.A.
Advanced services sector		N.A.		N.A.	N.A.	N.A.	N.A.	N.A.
Parking		N.A.		N.A.	N.A.	N.A.	N.A.	N.A.

### 6.2 Average Market Value

Source: City of Boston, <http://www.cityofboston.gov/assessing/search/?q=>

Typology	Before the initiative (Year)	After the initiative (Year)
Housing (1 to 3 family residential)	649.8923	1789.169
Housing (4 to 6 family residential)	981.3201	2897.028
Housing (7 or more family residential, condominium)	620.0687	1814.883
Commerce	N.A.	N.A.
Industry	N.A.	N.A.
Advanced services sector	N.A.	N.A.
Parking	N.A.	N.A.

### 6.3 Commerce and advanced services sectors

Source: EBMS internal documentation, first floor inventory.

Typology	Units	Renovated Buildings		New Buildings	
		<i>sqm</i>	<i>sqm</i>	<i>sqm</i>	<i>sqm</i>
Mall	Shaws supermarket	N.A.	N.A.	N.A.	N.A.

Farmer market		N.A.	N.A.	N.A.	N.A.
Small retail	1 library 9 clothes shops 1 electronics 2 florists 1 furniture 15 groceries 9 gift shops 3 liquors and spirits 5 photography 4 others <b>Total:50</b>	N.A.	N.A.	N.A.	N.A.
Handcrafts		N.A.	N.A.	N.A.	N.A.
Business financial	5 banks 9 other finance services <b>Total: 14</b>	N.A.	N.A.	N.A.	N.A.
Administration buildings	Public Welfare Building <b>Total: 1</b>	N.A.	N.A.	N.A.	N.A.
Insurance		N.A.	N.A.	N.A.	N.A.
Restaurants	<b>Total: 38</b>	N.A.	N.A.	N.A.	N.A.
B&B		N.A.	N.A.	N.A.	N.A.
Hotel		N.A.	N.A.	N.A.	N.A.
Cinema		N.A.	N.A.	N.A.	N.A.
Museum		N.A.	N.A.	N.A.	N.A.
Theatres		N.A.	N.A.	N.A.	N.A.
Universities / campus		N.A.	N.A.	N.A.	N.A.
<b>Gas station</b>	<b>1</b>	N.A.	N.A.	N.A.	N.A.
<b>Advanced services</b>	5 law offices 4 education centres 1 others	N.A.	N.A.	N.A.	N.A.
<b>Services</b>	3 laundries 6 real estate 15 salons 2 travel agencies 24 money transfers 4 others				
<b>Churches</b>	<b>2</b>	N.A.	N.A.	N.A.	N.A.

## 6.4 Community facilities

Source: field work

Typology	Units	Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after district (sqm or number)
		Private	public	private	public	
Schools	2	N.A.	N.A.	N.A.	N.A.	N.A.
Public libraries	none	N.A.	N.A.	N.A.	N.A.	N.A.
Post office	1	N.A.	N.A.	N.A.	N.A.	N.A.

Hospital/medical centre	7 dentists 2 pharmacies 7 health-physiotherapy centres	N.A.	N.A.	N.A.	N.A.	N.A.
Safety Security	1	N.A.	N.A.	N.A.	N.A.	N.A.
Job center	none	N.A.	N.A.	N.A.	N.A.	N.A.
Public park	none	N.A.	N.A.	N.A.	N.A.	N.A.
Train Station/T station	1 t station	N.A.	N.A.	N.A.	N.A.	N.A.
Bus station	none	N.A.	N.A.	N.A.	N.A.	N.A.
Bike car sharing service	none	N.A.	N.A.	N.A.	N.A.	N.A.
Housing	6322	N.A.	N.A.	N.A.	N.A.	N.A.

## 6.5 Accessibility

Source:

Distance from Central Boston	Average Time	Average Km
By subway	13 min	
By bus	63 min	
By car	11 min	4,4
By rail		

## 6.6 Supply chain: supply of local products

Products	Supplier (origin)	Distance from the area
Foods	N.A.	N.A.
Handcrafts	N.A.	N.A.
Others	N.A.	N.A.

## 6.7 Environmental data

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N.A.	N.A.	N.A.
Ratio of green space to built-up area	N.A.	N.A.	N.A.
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	N.A.	N.A.	N.A.
% use of space over 24 hours	N.A.	N.A.	N.A.
Density level per square metre of scheme	N.A.	N.A.	N.A.
% of recycled material used in the built environment	N.A.	N.A.	N.A.



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% of non-renewable resources consumed in current scheme	N.A.	N.A.	N.A.
LEEDs, green building initiatives undertaken (www.usgbc.org)	N.A.	N.A.	N.A.
Energy efficiency measures undertaken	N.A.	N.A.	N.A.
Other environmental indicators specifically applied to the initiative	N.A.	N.A.	N.A.

### 6.8 Social data

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N.A.	N.A.	N.A.
Social service personnel per 1,000 population	N.A.	N.A.	N.A.
Occupancy levels in residential area (voids and vacant properties)	N.A.	N.A.	N.A.
% of hospital recovery	N.A.	N.A.	N.A.
Other social indicators specifically applied to the initiative	N.A.	N.A.	N.A.

### 6.9 Geographical information (GIS based)

Source

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis

## 7 VIII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

#### Date

02/20/2012

#### Day of the week

Monday

#### Time

11:47 AM

#### Notes

Maverick Square, at the southern border of the EBMS district, connects the area with the rest of the City through the T blue line.

Picture 1 shows Maverick Square as it is today, after the subway station renovation finished in 2009. The T station's renovation included an upgraded plaza with a safer pedestrian environment, as well as improved connectivity with bus lines, and a new headhouse closer to the waterfront.



### Picture n.2

#### Date

10/04/2004

#### Day of the week

unknown

#### Time

unknown

#### Notes

Picture 2 shows Maverick Square before the renovation in 2004



**Picture n.3**

**Date**

02/10/2012

**Day of the week**

Thursday

**Time**

12:03 PM

**Notes**

Central Square, at the northern border of the EBMS district, looks like an open shopping mall, where the largest food and retail chains of US (Marshall's, Shaws, Mc Donald, etc.) are located. There is a strong contrast between this part of the EBMS district and the rest, composed mainly by immigrant-owned small businesses.



**Picture n.4**

**Date**

02/10/2012

**Day of the week**

Thursday

**Time**

11:30 PM

**Notes**

An example of facade improvement, realized by to EBMS, in the main street of the district (Meridian Street). The storefront improvement has pushed to the entire building renovation. Compare to picture 5.



**Picture n.5**

**Date**

03/04/2012

**Day of the week**

Sunday

**Time**

01:42 PM

**Notes**

The picture show the state of deterioration of some buildings located in the EBMS district in a minor street, close to the EBMS district borders.



**Picture n.6**

**Date**

unknown

**Day of the week**

unknown

**Time**

unknown

**Notes**

One of the facade improvement projects realized by the EBMS in Central Square (before/after).



**Picture n.7**

**Date**

03/06/2012

**Day of the week**

Tuesday

**Time**

03:00 PM

**Notes**

There are several painted walls in the EBMS district which tell the story of immigration in East Boston. The neighbourhood identity is strongly determined by the fact of being historically a point of entry for immigration.



**Picture n.8**

**Date**

03/04/2012

**Day of the week**

Sunday

**Time**

12:32 PM

**Notes**

Even though today most of the inhabitants of the area are Latinos, there are still some traces of the large Italian community that lived in the area.



**Picture n.9**

**Date**

02/10/2012

**Day of the week**

Thursday

**Time**

11:30 PM

**Notes**

Another example of storefront improvement realized by the EBMS. The restaurant sign is written in mexican, as well as the menu (linguistic isolation).



**Picture n.10**

**Date**

03/04/2012

**Day of the week**

Sunday

**Time**

11:22 PM

**Notes**

Picture 10 and 11 show the kind of food sold in the little supermarkets of the area, whose supply is mostly targeted at the Latino community.



**Picture n.11**

**Date**

03/04/2012

**Day of the week**

Sunday

**Time**

11:22 PM

**Notes**

Picture 10 and 11 show the kind of food sold in the little supermarkets of the area, whose supply is mostly targeted at the Latino community.



**Picture n.12**

**Date**

03/06/2012

**Day of the week**

Tuesday

**Time**

1:00 PM

**Notes**

The East Boston Saving Bank, one of the main sponsor of the EBMS.

On the north side of Maverick Square, in the triangular block surrounded by Meridian, Maverick and Paris Streets lie three substantial buildings built in the early 1900's for the Columbia Trust Company, the Metropolitan Trust

Company and the East Boston

Savings Bank respectively. Together with the District Court, the Police Precinct and the Post Office on this block, these buildings give this area of the neighborhood a decidedly institutional character.





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study(denomination):** **CONCORD COMMONS COMMUTER RAIL**

**Researcher:** **CARLA MAIONE**

## Survey Form

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# 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

## 1.1 General Information

ZONING CODE	Concord Zoning Bylaw, adopted pursuant to Chapter 40A, "The Zoning Act" of the Commonwealth of Massachusetts Business district, <a href="http://www.mapsonline.net/concordma/">http://www.mapsonline.net/concordma/</a>	
Topical areas	<input type="checkbox"/> Partnership agreement	
	<input type="checkbox"/> Business Improvement District	
	<input type="checkbox"/> Community Development Corporations	
	<input checked="" type="checkbox"/> Urban Agricultural Linkages	
	<input type="checkbox"/> Social Enterprise	
	<input type="checkbox"/> University-focused	
	<input type="checkbox"/> Non-profit assistance/development	
	<input type="checkbox"/> Business incubators	
Location	Neighbourhood	<b>Concord Center</b>
	ZIP Code	01742
	City	<b>Concord</b>
	County	<b>Middlesex</b>
	State	<b>Massachusetts</b>
Start-up Source: interview MarciaRasmussen.....	Year	1994
Years in operation Source: interview MarciaRasmussen.	Year	17
Numbers of renewal Source: interview MarciaRasmussen.	Year	0
Dimension Source: interview MarciaRasmussen.	Area (sq. Km)	0.011 km <sup>2</sup> 10966.9 m <sup>2</sup>
	Residents	4422 ab. Track 3611 Concord Center
Partnership Institutional Typology	Typology	Reference by Law
	<input type="checkbox"/> BID: Business Improvement District	
	<input type="checkbox"/> PA: Public Agency	
	<input type="checkbox"/> CDC: Community Development Corporations	
	<input type="checkbox"/> SE: Social Enterprise	
	<input type="checkbox"/> NPOMS: Non Profit Organization for implementing the Main Street initiative	
	<input type="checkbox"/> NPCBPO: Non Profit Community-Based Planning Organization other than CDC, SE, MS	
	<input checked="" type="checkbox"/> TOD: TRANSIT ORIENTED DEVELOPMENT	The TOD program is a smart growth initiative by the state with the purpose of providing financial assistance for parking facilities, pedestrian and bicycle facilities, and housing. Chapter 291 of the Acts of 2004. Draft guidelines were established in January 2005 by the Office of Commonwealth Development in cooperation with the Executive Office of Transportation and DHCD



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Partnership composition Source: interview form Marcia Rasmussen	Name	Public/Private/NGO	% Initial Capital Invested
	<b>Period Realty Trust (REAL ESTATE)</b> <b>Warner Wood Llc</b>	<b>Private developer</b> <b>Private developer</b>	90% <b>The developer has been financed by local banks</b>
	<b>MBTA</b>	<b>public</b>	10%
	<b>Town Of Concord</b>	<b>Concord Housing Authority</b>	N/A
Number of board directors Source: INTERVIEW MARCIA RASMUSSEN	Marcia Rasmussen Director Julie Vaughan Senior Planner		



## 1.2 Abstract of the initiative

(Source/s: Interview Marcia Rasmussen, Interview Cecil Group, [http://www.mass.gov/envir/smart\\_growth\\_toolkit/pages/mod-tod.html](http://www.mass.gov/envir/smart_growth_toolkit/pages/mod-tod.html))

### The case study in brief (What is the case study, max 15 rows)

Concord historic suburban, located a few miles of Boston, was established in 1635 as a farming community but in 1987 the town have prepared a "Long Range Plan" intended to direct development in Concord, with a purpose of incorporate Businesses and housing in proximity to the stations (Concord Commuter Rail Station) and this have Identified the Concord Commons (1994) as an important node for future higher density commercial. Today, the result is that the initiative provided direct access to downtown Boston and have improving the quality of life of the entire local community.

The Concord Common development comprises three mixed use buildings with retail space, office space, a 180 seat restaurant, and 20 rental apartments. The Concord Commons development is just one element of a vibrant mixed-use neighborhood surrounding the Concord Center commuter rail station. The old station building represents a stunning example of historic train stations of the mid-1800s. This meticulously preserved building houses an upscale general store and a restaurant. A mix of retail and office uses line both Thoreau and Sudbury Road within an easy walk to the station.

### The Challenge (Why the case worth discussing, max 5 rows)

The business for developer was integrated housing and retail, and for the community was important the growth of the small retail, or small business, and the strategy was to keeps rents of the local stable in the time.

The planning for TOD

In 1987 the Town prepared a long range plan intended to direct development in Concord. The long range plan identified the Concord Center station as an important node for future higher density commercial and residential development. The Town particularly recognized the potential to redevelop the lumber yard site with uses that might benefit from a location in close proximity to the commuter rail station.

### The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)

The Concord Center station is located about 1/3 mile from the historic business center of Concord, which today is recognized as a major tourist destination. The station serves commuters heading to jobs in Boston as well as tourists headed to historic sites in Concord. Concord Commons is located parallel and adjacent to the Commuter Rail Road between Sudbury Road and Belknap Street, In a Zoning business district.

Commercial area along Thoreau Street with railroad tracks and depot. Depot building is also listed separately under transportation. Area includes Concord Crossing, a complex of mixed retail, office and residential uses Concord Depot.

### The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)

The strategy of CONCORD COMMUTER RAIL was that Local property owners and developers have always worked with local government-often local business owners served on town boards and committees that envisioned the future.

THE Parking, is one of the secrets to success for Business District, is the ability for parking spaces to be shared among different users at different times. Not only does this promote the efficient use of the land, it supports the type of active pedestrian district that is critical to supporting vital mixed-use centers. Shared parking accommodations can be accomplished through zoning and agreements, but need to be planned and managed.

Many of the businesses are locally owned and operated. They provide a mix of necessities and unique services and products that is valued by neighborhood residents. Businesses in the core area include a mix of small retailers, eating places, and personal and professional services. These are mostly small operations with an average range of 2,500 to 3,500 square feet. Over the last several years there appears to be growing clusters of related products such as the natural foods and food-product businesses and home decoration and improvement businesses.

### 1.3 Map

(Source:googlemap)



## 1.4 Budget size

(Source: Period Realty Trust-interview Marcia Rasmussen-  
<http://www.manta.com/c/mtv2vs8/period-realty-trust-inc>) **2011**

Budget size Period Realty Trust, 2011

Expenditure	
Revenue	\$ 500.000 (2011)
Total Budget	\$ 500.000 (2011)

## Budget size Concord Commons Commuter Rail

*Expenditure	\$ 1,425,000
Revenue	\$ 804.300
Total Budget	\$ 1,425,000

\*Initial budget for construction and maintenance

## 1.5 Vacancy rate

(Source: factfinder2)

Vacancy	%	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm)	-	-	-
Vacant housing property (sqm)	3% (2000) 6% (2010)	-	-
<b>Units-track-3611 Concord</b>			
Vacant land (sqm)	-	-	-

## 1.6 Strategic Priorities

(Source: Interview Marcia Rasmussen, [www.concordma.gov](http://www.concordma.gov), [http://www.mass.gov/envir/smart\\_growth\\_toolkit/pages/mod-tod.html](http://www.mass.gov/envir/smart_growth_toolkit/pages/mod-tod.html))

Priorities	Description
<input checked="" type="checkbox"/> Retail Enhancement	Concord COMMONS, on a limited budget, is to keep and grow local businesses and, at the same time, attract new entrepreneurs to the village, it must develop a simple and compelling story that differentiates it from its competitors.
<input checked="" type="checkbox"/> Economic Revitalization	Preservation of independent businesses which contribute to the village's unique character.
<input type="checkbox"/> Security and Safety	
<input type="checkbox"/> Building Restoration/Renewal	
<input type="checkbox"/> Innovation/Green Technologies	
<input type="checkbox"/> Education and Training	
<input checked="" type="checkbox"/> Job Creation/Social works	TOD enhances the role of transit in providing access to jobs by increasing opportunities for people to find housing and employment near transit stations. A particular focus of this project should be strengthening the Thoreau street and the small retail in Concord Crossing, by working with existing and prospective, property owners and developers on redevelopment that fills market niches and expands mixed uses, as well as creates new high-quality jobs
<input type="checkbox"/> Technology Transfer	
<input type="checkbox"/> Capacity Building	



<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	Chapter 40R zoning encourages a significant proportion of housing and affordable units within the housing mix and require "by right" a minimum density of housing units per acre.
<input checked="" type="checkbox"/> Local produce valorisation	The strategy for the valorization of the local produce, is A farmers' market should feature local and regional produce and related agricultural goods. Concord Commons is an excellent venue especially if the hours coincided with commuter train schedules so local residents could buy goods on return trips from work. Farmers' markets can be held for four to six months of the year and coupled with other activities, such as live music.
<input checked="" type="checkbox"/> Cultural enrichment	The Town and village working together with community, the Chamber of Commerce and business owners to assess ongoing and potential new events and activities to enhance local and regional residents of Concord, attract more visitors and customers, and demonstrate the viability of the village center to prospective businesses. The Concord Festival for the farmers is an example of such an event that celebrates the community.
<input checked="" type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	Open space and pedestrian access.
<input checked="" type="checkbox"/> ..Others Parking	Facilitate parking agreements – Formalized agreements among property owners (including the Town) may lead to more efficient, shared layouts and access for pedestrians and vehicles at the MBTA/Town lot and the private parking.

## 1.7 Private sector involvement

(Source: Interview Marcia Rasmussen)

Exist a informal agreement between period realty trust and concord housing authority for affordable housing,  
And formal agreement between Period Realty Trust and MBTA for parking.

All Business enterprises are associated: ☐ if not indicate the % \_\_\_\_

All merchants are associated : ☐ if not indicate the % \_\_\_\_

Other private entities (no profit) : ☐ if not indicate the % \_

## 1.8 Public investment programs

(Source: [www.concordma.gov](http://www.concordma.gov))

Policy focus for public investment program	Description
<input checked="" type="checkbox"/> Tax policy focus	There are low taxes for affordable housing.
Fiscal policy focus	
Economic development organizations	
University focus	
Recruitment	
<input checked="" type="checkbox"/> Business Aid (Start-up, Spill Over, funding, copyright, etc.)	A key to success are private sector investment, structured to attract private capital and to leverage public investment to the optimum extent Entrepreneurship, Business Startup, and Local Ownership – In order to maintain and enhance local ownership and small business development, it is essential that Concord commons continue to provide an ample stock of lower cost commercial and light industrial space. These goals are identified in the Comprehensive Long Range Plan of 2005, the Village Centers Study of 2007
Credit Access	
Local Welfare Policy	
<input checked="" type="checkbox"/> Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	Massachusetts has enabled towns to implement special Smart Growth Zoning Districts commonly called "Chapter 40R" zones, referring to the section of the Massachusetts General Laws that recently established this new tool. This mechanism promotes "as of right" development with certain densities and use mixes geared to transit-oriented town and village center scales.



## MARIE CURIE IRSES - **CLUDs PROJECT**



	Uses within a 40R zone include a significant proportion of housing and affordable units within that housing mix, and require a minimum density of units per acre. The state has offered financial incentives to defray costs associated with such development.
--	--



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

### **2.1 Demographic and housing characteristics**

### **2.2 Labor Market**

### **2.3 Overall socioeconomic data**

### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

(Source: interview Marcia Rasmussen)

Items <b>Town of Concord</b>	Year	Expenditure (\$)		Total
		Public	Private	
General & administrative	-	-	-	-
Social services	-	-	-	-
Capital improvements	-	-	-	-
Streetscape/ sidewalk maintenance and repair	-	-	-	-
Graffiti removal	-	-	-	-
Beautification & Horticulture	-	-	-	-
Holiday lighting	-	-	-	-
Sanitation	-	-	-	-
Security	N/A	N/A	N/A	N/A
Marketing, communication special events and tourism	-	-	-	-
Education	-	-	-	-
Job creation initiative	N/A	N/A	N/A	N/A
Resident initiative	-	-	-	-
<b>Building and land cost</b>	1994		804200	804200
<b>Open space and access pedestrian</b>	1994		211000	211000

#### 3.2 Source of revenue

(Source: [www.concordma.gov](http://www.concordma.gov), Implementation Plan data 2010-2011)

Items	Year	revenue (\$)	Description Public/ private
Program service revenue	-	-	
Special contracts	-	-	
Investment income	-	-	
Fundraising & special events	-	-	
Government Grants	2011	10milioni	the TOD overlay zoning district program will award funding up to \$10 million.
Private contributions	-	-	
Interest	-	-	
Assessment (fee or levy)	2011	6,475,500	
Rental income	-	-	
Other... parking	N/A	N/A	Parking for non-residential uses shall be provided at not more than 3 per 1,000 square feet (gross) and not less than less than 1 per 500 square feet (gross) for uses covering less than 1,000 square feet

\*all source of revenue are expected

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

(Source: concordma.gov)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area				
Creation of new business (start-ups)				
Retention of business	All the units at the station are rented at market rates, with the purpose to encourage the small retail and to keeps rents of the local stable in the time.	2 Restaurant 1mall 10 Small Retail 146 parking 1 pedestrian access 20 housing unit	X	X
Assistance weak business				

### 4.2 Services and improvements

(Source: concordma.gov)

Programs	Description	Item	Financial sources	
			Public	Private
<input type="checkbox"/> Retail Enhancement				
<input type="checkbox"/> Economic Revitalization				
<input type="checkbox"/> Security and Safety				
<input checked="" type="checkbox"/> Building Restoration/Renewal	Zoning Bylaw Amendment—Establish the Concord CENTER Mixed Use Overlay District	4 building in 10966mq parcel 630.		X
<input type="checkbox"/> Innovation/Green Technologies				
<input type="checkbox"/> Education and Training				
<input checked="" type="checkbox"/> Job Creation/Social works	Transit Oriented Development Bond Program (EOT) The TOD's program, transit is recognized as an important investment for providing access to jobs for lower income people, the elderly and the disabled, as well as for suburban commuters.	N/A	X	
<input type="checkbox"/> Technology Transfer				
<input type="checkbox"/> Capacity Building				
<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	Affordable housing	20 unit of affordable housing Apt 20-Unit Mdl-94		X
<input type="checkbox"/> Local produce valorisation				
<input checked="" type="checkbox"/> Cultural enrichment	Community initiated developments (CID)	Festival and farmer's	N/A	X
<input checked="" type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	Public Works Economic Development Program (EOT) Transit Oriented Development Bond Program (EOT) Period Realty Trust	Open space and design of pedestrian improvements and/or bicycle facilities		X

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.



## MARIE CURIE IRSES - **CLUDs PROJECT**



<input checked="" type="checkbox"/> <b>Others</b>	<b>Public Works Economic Development Program (EOT)</b> Transit Oriented Development Bond Program (EOT)	<ul style="list-style-type: none"> <li>• Parking facilities</li> </ul>		×

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations/ association

(Source: .....)

Name	Typology (size)	Level of influence (with respect the size of the organization) or (describe the organization)
Concord housing authority		medium
Concord housing trust	No-profit	medium
Concord housing development corporation	No-profit	

### 5.2 Local elected official and community board members

"Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for."

(Source: I interview Marcia Rasmussen)

Name	Elected/member	Political role
Sally Schnitzer	Board selectman	Town Representative
Guy P. DiGiovanni	Owner	Community Representative
Kate flora	Planning board member	Community Representative
Kevin Hurley	Director of Planning and Land Management	Town Representative
Alfred Lima	Director of Planning and Land Management	Town Representative
Christopher Whelam	Town Manager	Town Representative
HAL STORRS	Director Public Works	Town Representative
RICHARD SPROUL	Manager Of Special Service	Town Representative

### 5.3 Owners/tenants

(Source: INTERVIEW MARCIA RASMUSSEN)

Typology	Number
Commercial property owners	1
Industrial property owners	N/A
Commercial Tenants	N/A
Resident owners	1
Community organizations	N/A

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

(Source : <http://data.visionappraisal.com/ConcordMA/findpid.asp?iTable=pid&pid=4255>)  
[http://www.concordma.gov/pages/concordma\\_finance/clrp/chapter\\_2.pdf](http://www.concordma.gov/pages/concordma_finance/clrp/chapter_2.pdf)

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	sqm	\$/sqm	sqm	\$/sqm	sqm	\$/sqm	sqm	\$/sqm
Housing (1 to 3 family residential)					N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)					N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)	65 sqm	\$306,603 (sqf) \$900-1200 Sqm	65sqm	1200/1600	580	1337	N.A.	N.A.
Commerce					2916	1046	N.A.	N.A.
Industry					N.A.	N.A.	N.A.	N.A.
Advanced services sector					N.A.	N.A.	N.A.	N.A.
Parking					N.A.	N.A.	N.A.	N.A.

1sf=0,09 sqm 1sqm=10,76 sf

### 6.2 Average Market Value

(Source : <http://data.visionappraisal.com/ConcordMA/findpid.asp?iTable=pid&pid=4255>)

Typology	Before the initiative (Year)	After the initiative (2011)
Housing (1 to 3 family residential)		
Housing (4 to 6 family residential)		
Housing (7 or more family residential, condominium)	N/A	\$1203 -\$1 339
Commerce	N/A	\$1800 sqm
Industry	-	-
Advanced services sector	-	-
Parking	N/A	\$150

\*Median sales price in Concord Commons for a single-family \$615,175(Warren Group), \$656,700 (Town Median Value). Even condos are out of reach with a median sales price of \$550,750 (Warren Group), \$326,100 (Town Median Value)

### 6.3 Commerce and advanced services sectors

(Source : <http://data.visionappraisal.com/ConcordMA/findpid.asp?iTable=pid&pid=4255>)

Typology	Unit	Renovated Buildings		New Buildings	
		sqm	\$/ sqm	sqm	\$/ sqm
Mall	1	1748	\$124 sqf \$1768 sqm	-	-
Farmer market	1			-	-
Small retail	10	1366	1046	-	-
Handcrafts	-			-	-
Business financial	-	222	1700	-	-
Administration buildings	-	-	-	-	-
Insurance	-	-	-	-	-
Restaurants	2 180 seat restaurant	1360	1722	-	-
B&B	-	-	-	-	-
Hotel	-	-	-	-	-
Cinema	-	-	-	-	-
Museum	-	-	-	-	-
Theatres	-	-	-	-	-
Universities / campus	-	-	-	-	-

### 6.4 Community facilities

(Source : <http://data.visionappraisal.com/ConcordMA/findpid.asp?iTable=pid&pid=4255>)

Typology	Unit		Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after project (sqm or number) <b>Description</b>
	Private	Public	Private	Public	Private	Public	
Schools	-	-	-	-	-	-	-
Public libraries	-	-	-	-	-	-	-
Post office	-	-	-	-	-	-	-
Hospital	-	-	-	-	-	-	-
Safety Security	-	-	-	-	-	-	-
Job center	-	-	-	-	-	-	-
Public park	yes	-	-	-	-	-	-
Train Station	-	yes	-	-	-	-	-
Bus station	yes	-	-	-	-	-	-
Bike - Car sharing service	1			N/A	N/A	N/A	Municipalities adopting a TOD overlay district are encouraged to review these requirements and incorporate some of the bicycle parking design and materials requirements into their bylaws to ensure that quality bicycle parking is provided
Housing	20 unit	2		\$1 337 sqm	-		The Town strongly urged the developer to include 2affordable units at the site, although the final agreement required that he provide four affordable units at another location in the Town,



							allowing all the units at the station to be rented at market rates
<b>Parking</b>	146 unit	15 unit					146 parking spaces private . 15 spaces Commuter Parking.

## 6.5 Accessibility

(Source: google maps.com)

Distance from Downtown	Time	Km
By subway	-	-
By bus	-	-
By car	35 minuti	33 km
By rail	60 minuti	33 km

## 6.6 Supply chain: the supply of local products

(Source: example Verrill Farm, <http://www.verrillfarm.com/>)

Products	Supplier (origin)	Distance from the area
<b>Foods</b>	Concord Historic Center	2,5 miles, 6 minutes
<b>Handcrafts</b>	<b>N/A</b>	<b>N/A</b>
<b>Others</b>	<b>N/A</b>	<b>N/A</b>

Dal 2000-2010

## 6.7 Environmental data

(Source: .....)

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N/A	N/A	N/A
% use of space over 24 hours	N/A	N/A	N/A
Density level per square metre of scheme	N/A	N/A	N/A
% of recycled material used in the built environment	N/A	N/A	N/A
% of non-renewable resources consumed in current scheme	N/A	N/A	N/A
LEEDs, green building initiatives undertook (www.usgbc.org)	N/A	N/A	N/A
Energy efficiency measures undertook	N/A	N/A	N/A
Other environmental indicators specifically applied to the initiative	N/A	N/A	N/A



## 6.8 Social data

Planning district, department of police..  
(Source: [www.concordma.gov](http://www.concordma.gov))

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N/A	2,108 total crimes reported in Concord, 211 crimes in average per year in Concord commons	N/A
Social service personnel per 1,000 population	N/A	N/A	N/A
Occupancy levels in residential area (voids and vacant properties)	Occupied 1637 Vacant 55	1637 Vacant 57	
% of hospital recovery	N/A	N/A	N/A
Other social indicators specifically applied to the initiative	N/A	N/A	N/A

## 6.9 Geographical information (GIS based)

(Source: .....)

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	Farmers market, pedestrian access and parking
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	Pedestrian access, Subdury Road And Concord Crossing
Connectivity grid	It still doesn't exist but it is expected (Long range plan, village study 2007, Implementation Plan)

## 7 VIII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 A.m**

**Notes: Concord Depot**

The old station building represents a stunning example of historic train stations of the mid-1800s.



### Picture n.2

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 A.m**

**Notes: Concord Depot And  
Parking private and public**



**Picture n.3**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 A.M**

**Notes: Mall retail, Sturbucks and Dunkin Donats**



**Picture n.4**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 A.M**

**Notes: Small Retail and Food Italian**



**Picture n.5**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 a.m**

**Notes: Concord Depot in Thoreau Street, and office of Bank of America**



**Picture n.6**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: small Retail**



1

**Picture n.7**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: Small Retail, Italian food**



**Picture n.8**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: Concord Consortium**  
**No-profit organization**



**Picture n.9**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 a.m**

**Notes: small retail**



**Picture n.10**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 a.m**

**Notes: Luxury Restaurant, Chinese food**



**Picture n.11**

**Date 02/08/2012**

**Day of the week Wednesday**

**Time 10.30 a.m**

**Notes: Pedestrian Access from Subdury Road and Thoreau Street**



**Picture n.12**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: Small Retail, Thoreau Street**



**Picture n.13**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: Colonial Housing**



**Picture n.14**  
**Date 02/08/2012**  
**Day of the week Wednesday**  
**Time 10.30 a.m**  
**Notes: Bike Sharing at the Concord Commons**







**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – *Northeastern University* of Boston (MA)

**Case Study:** ***DOWNTOWN BOSTON BUSINESS IMPROVEMENT DISTRICT***

**Researcher:** Alessia Ferretti

## Survey Form

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## 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

### 1.1 General Information

<b>Zoning Code</b> Source: <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a>	General Code – Map 1 (Boston Proper) – Article 27 Volume II (Downtown Districts, Central Artery, Special District, Harborpark District) – Map 1A (Midtown Cultural District) – Article 38	
<b>Topical areas</b>	<input type="checkbox"/> Partnership agreement	
	<input type="checkbox"/> Community Development	
	<input type="checkbox"/> Urban Agricultural Linkages	
	<input type="checkbox"/> Social Enterprise	
	<input type="checkbox"/> University-focused	
	<input checked="" type="checkbox"/> Non-profit assistance/development	
	<input type="checkbox"/> Business incubators	
<b>Location</b>	<i>Neighbourhood</i> Downtown - Boston	
	<i>ZIP Code</i> 02110	
	<i>City</i> Boston	
	<i>County</i> Suffolk	
	<i>State</i> Massachusetts	
<b>Start-up</b> Source: <a href="http://www.bostonbid.org">www.bostonbid.org</a> [Access: 28.01.2012] <a href="http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf">http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf</a> [Access: 12.02.2012] <a href="http://www.bostonredevelopmentauthority.org/planning/PlanningInitIndividual.asp?action=ViewInit&amp;InitID=110">http://www.bostonredevelopmentauthority.org/planning/PlanningInitIndividual.asp?action=ViewInit&amp;InitID=110</a> [Access: 28.01.2012]	<i>Year</i> 2010 (September)	
<b>Years in operation</b>	<i>Year</i> 1	
<b>Number of renewals</b> Source: <a href="http://www.bostonbid.org">www.bostonbid.org</a> [Access: 28.01.2012] <a href="http://www.bostonredevelopmentauthority.org/planning/PlanningInitIndividual.asp?action=ViewInit&amp;InitID=110">http://www.bostonredevelopmentauthority.org/planning/PlanningInitIndividual.asp?action=ViewInit&amp;InitID=110</a> [Access: 28.01.2012]	1996	The Downtown Boston BID is proposed and championed by Boston's mayor, Thomas Menino. Barrett F., "Improving downtown Boston through BID", on-line article in <i>Boston Society of Architects</i> , 28 January 2011. <a href="http://www.architects.org/news/improving-downtown-boston-through-bid">http://www.architects.org/news/improving-downtown-boston-through-bid</a> [Access: 30.01.2012]
	2004	In October 2004, Mayor Thomas Menino launched the <i>Downtown Crossing Economic Improvement Initiative (DCEII)</i> , signaling a renewed commitment to the beloved but tired neighborhood.

	2010-2011	The Downtown Boston BID was started up in September 2010; it became completely effective in April 2011.	
<b>Dimension</b> Source: <a href="http://www.bostonbid.org">www.bostonbid.org</a> [Access: 28.01.2012] <a href="http://hubmaps.cityofboston.gov/MyNeighborhood">hubmaps.cityofboston.gov/MyNeighborhood</a>	Area (sq. Km)	39,14 ha (0,4 Km <sup>2</sup> )	
	Residents	4148 (within the BID boundaries)	
<b>Partnership Institutional Typology</b>	Typology		Reference by law
	<input checked="" type="checkbox"/> BID: Business Improvement District		This BID is a 501(c)6 organization - a nonprofit corporation exempt from some federal income taxes – Section 501(c) of the United States Internal Revenue Code (26 U.S.C. § 501(c).
	<input type="checkbox"/> PA: Public Agency		
	<input type="checkbox"/> CDC: Community Development Corporations		
	<input type="checkbox"/> SE: Social Enterprise		
	<input type="checkbox"/> NPOMS: Non profit organization for implementing the Main Street initiative		
	NPCBPO: Non profit Community-Based <input type="checkbox"/> Planning Organization other than CDC, SE, MS		
	<input type="checkbox"/> TOD		
	<input type="checkbox"/> Other (specify)		
<b>Partnership composition</b> Source: <a href="http://www.bostonbid.org">www.bostonbid.org</a> [Access: 28.01.2012] <a href="http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf">http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf</a> [Access: 12.02.2012]	Name	Public/Private/NGO	% Initial Capital Invested
	Owners	Private	100%
	Boston Redevelopment Authority	Public Authority	-----
	City of Boston	Public Authority	-----
	Suffolk University	Private	-----
	Emerson College	Private	-----
	Other actors	Public/Private	-----
<b>Number of board directors</b> Source: <a href="http://www.bostonbid.org">www.bostonbid.org</a> [Access: 28.01.2012] <a href="http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf">http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf</a> [Access: 12.02.2012]	32		

## 1.2 Abstract of the initiative

### Sources

[www.bostonbid.org](http://www.bostonbid.org)

<http://www.bostonredevelopmentauthority.org/planning/PlanningInitsIndividual.asp?action=ViewInit&InitID=110>

[Access: 28.01.2012]

### *The case study in brief (What is the case study, max 15 rows)*

The **Downtown Boston Business Improvement District** is a non-profit corporation created by over 500 property and business owners committed to achieving downtown's full potential as a vibrant and thriving destination – that is to boost an attractive area which was starting to sag. It works toward this goal by providing programs and services that will increase business activity, enhance property values and attract further investment in the area; at the same time, it works to improve and maintain the physical space (through landscaping, consistent design, new street furniture) and to create a clean, welcoming, safe and vibrant environment.

Trough economic development functions and marketing activities, the Downtown BID supports property owners, brokers, leasing agents and businesses in their efforts to recruit and retain tenants, retailers, employers, residents, customers and visitors to Downtown Boston.

### *The Challenge (Why the case worth discussing, max 5 rows)*

The Downtown Boston BID was proposed in order to offer supplemental services to revitalize and support long-term enhanced maintenance of the area, where the mix of commercial, retail, hospitality, nonprofit institutional and residential property in the area demand a higher level of services than the City provides.

The Downtown Boston BID has been established after 15 challenging years and after many failed attempts and it represents the strength of a solid finally achieved partnership.

### *The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)*

The **Downtown Boston Business Improvement District** serves a 34-block area which includes the *Downtown Crossing* (the retail center of the district), the *Ladder District* (known for its popular restaurants and nightlife), the *Theater District* (the historic district where three architectural treasures – the Paramount, the Modern Theatre and the Boston Opera House – were restored to their original glory), part of the *Financial District*. This district – a major hub of Boston public transportation network – is both a local and international crossroad; it offers a wide range of amenities, historic architecture, residential living, state-of-the-art office spaces, retail options, cultural, dining and entertainment choices. It is known for its walkability, as well as its proximity to government institutions and major convention centers; moreover, the district is the link between the Olmsted-designed parklands, the Rose Kennedy Greenway and Boston Waterfront, as well as the new Seaport Innovation District.

### *The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)*

The **Downtown Boston BID** intends to revitalize the downtown area in order to make it a neighborhood – a true urban experience where people live, shop, work, play and meet; from this point of view, the initiative promote a wide beautification of the area (Hospitality and Cleaning), based on what already exists in the area – unique aspects that should always be a part of the neighborhood, like density, diversity, and an urban, youthful feel. On the other hand, aiming at promoting a general economic revitalization, the **Downtown Boston BID** serves as a resource for business relocation and to help connect business owners to the many resources available from the City of Boston (such as *Neighborhood Restaurant Initiative*, *ReStore Boston*, *Boston Buying Power*, *Boston Invests in Growth*, *Partners with Non-Profits*, *Boston Industrial Development Financing Authority*, and *Boston Local Development Corporation*).

### 1.3 Map

Source:

<http://www.bostonbid.org>

<http://hubmaps.cityofboston.gov/MyNeighborhood/>

[Access: 28.01.2012]



## 1.4 Budget size

Source:

<http://www.bostonbid.org>

[Access: 28.01.2012]

<http://origin.library.constantcontact.com/download/get/file/1011270028105-2659/About+the+Downtown+Boston+BID.pdf>

[Access: 29.01.2012]

[http://dynamodata.fdncenter.org/990\\_pdf\\_archive/273/273596446/273596446\\_201012\\_9900.pdf](http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf)

[Access: 12.02.2012]

Expenditure <sup>1</sup>	-----
Revenue	\$ 16 million (total revenue expected) Barrett F., "Improving downtown Boston through BID", on-line article in <i>Boston Society of Architects</i> , 28 January 2011. <a href="http://www.architects.org/news/improving-downtown-boston-through-bid">http://www.architects.org/news/improving-downtown-boston-through-bid</a> [Access: 30.01.2012]
Asset	\$ 80,501 million (2010)
Total Budget	\$ 2.9 million

## 1.5 Vacancy rate

Source:

<http://factfinder2.census.gov/faces/nav/jsf/pages/index.xhtml>

[Access: 28.01.2012]

Vacancy	% 2000	% 2010	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm or units)	N.A.	N.A.	N.A.	-----
Vacant housing property (sqm or units) <sup>2</sup>	396 units	1000 units	+ 60,4%	-----
Vacant land (sqm or units)	N.A.	5908 sqm (Vornado Property)	N.A.	-----

## 1.6 Strategic Priorities

Source:

<http://origin.library.constantcontact.com/download/get/file/1011270028105-2659/About+the+Downtown+Boston+BID.pdf>

[http://origin.library.constantcontact.com/download/get/file/1011270028105-2227/BID+Services+Brochure\\_June2011.pdf](http://origin.library.constantcontact.com/download/get/file/1011270028105-2227/BID+Services+Brochure_June2011.pdf)

[Access: 29.01.2012]

Sondergard M., "Have you noticed a change in downtown Boston? Business Improvement District is having an impact", on-line article in *CommonWealth – Politics, ideas and civic life in Massachusetts*, 22 august 2011.

<http://www.commonwealthmagazine.org/News-and-Features/Online-exclusives/2011/Summer/014-Have-you-noticed-a-change-in-downtown-Boston.aspx> [Access: 30.01.2012]

Priorities	Description
✓ Retail Enhancement	The Downtown BID aims at supporting property owners, managers and brokers in recruiting new businesses and tenants by distributing market information and by advertising office and retail space available (through the BID website and other communication channels). It also encourages businesses interested in locating downtown by raising the district's profile at key retail conventions.

<sup>1</sup> This table cannot be filled due to the short operating period of Downtown BID.

<sup>2</sup> These data refer to the Downtown area census tracts and not to the BID boundaries.

Priorities	Description
<input checked="" type="checkbox"/> Economic Revitalization	The Downtown BID aims at developing and maintaining regular profiles of the downtown economy, including real estate absorption rates, property and retail sales trends, pedestrian counts, parking inventory, and major employers.
<input checked="" type="checkbox"/> Security and Safety <i>(and cleaning)</i>	The Downtown BID addresses cleaning issues such as litter, weeds, and graffiti. Additionally, power washing services are provided through a relationship with a local social service provider.
<input type="checkbox"/> Building Restoration/Renewal	
<input type="checkbox"/> Innovation/Green Technologies	
<input type="checkbox"/> Education and Training	
<input checked="" type="checkbox"/> Job Creation/Social works	The Downtown BID intends to connect homeless individuals to social services programs through a relationship with local social service providers.
<input type="checkbox"/> Technology Transfer	
<input type="checkbox"/> Capacity Building	
<input type="checkbox"/> Local services/provisions <i>(housing, leisure, etc.)</i>	
<input type="checkbox"/> Local produce valorisation	
<input checked="" type="checkbox"/> Cultural enrichment	The Downtown BID aims at organizing art displays, jazz performances, car shows, restaurant crawls, etc. Hospitality Ambassadors are also on the street seven days per week to actively engage the public to serve as a welcoming presence into the district.
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity	

## 1.7 Private sector involvement

Source:

<http://www.bostonbid.org>

[Access: 28.01.2012]

- All Business enterprises are associated: ☐ if not indicate the %: **60%**
- All merchants are associated: ☐ if not indicate the % \_\_\_\_\_
- Other private entities (non profit) ☐ if not indicate the % \_\_\_\_\_

## 1.8 Public investment programs

Source:

[http://dynamodata.fdncenter.org/990\\_pdf\\_archive/273/273596446/273596446\\_201012\\_9900.pdf](http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf)

[Access: 12.02.2012]

Policy focus for public investment program	Description
Tax policy focus	<i>As a 501(c)6 nonprofit corporation, this BID is exempt from some federal income taxes –Section 501(c) of the United States Internal Revenue Code (26 U.S.C. § 501(c).</i>



Fiscal policy focus	-----
Economic development organizations	-----
University focus	-----
Recruitment	-----
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	-----
Credit Access	-----
Local Welfare Policy	-----
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	-----



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

*Please, refer to Annex 1*

### **2.1 Demographic data**

### **2.2 Labour Market**

### **2.3 Production**

### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditure

Source:

<http://www.bostonbid.org>

[Access: 28.01.2012]

<http://origin.library.constantcontact.com/download/get/file/1011270028105-2659/About+the+Downtown+Boston+BID.pdf>

[http://origin.library.constantcontact.com/download/get/file/1011270028105-2227/BID+Services+Brochure\\_June2011.pdf](http://origin.library.constantcontact.com/download/get/file/1011270028105-2227/BID+Services+Brochure_June2011.pdf)

[Access: 29.01.2012]

Items	Year	Expenditure (\$)		
		Public	Private	Total
General & administrative	2011	N.A.	N.A.	435.000 \$ (15%)
Social services ( <i>Hospitality Ambassador Program</i> )	2011	N.A.	N.A.	580.000 \$ (20%)
Capital improvements	2011	N.A.	N.A.	232.000 \$ (8%)
Streetscape/sidewalk maintenance and repair	----	-----	-----	-----
Graffiti removal ( <i>and cleaning</i> )	2011	N.A.	N.A.	1.218.000 \$ (42%)
Beautification & Horticulture	----	-----	-----	-----
Holiday lighting	----	-----	-----	-----
Sanitation	----	-----	-----	-----
Security	----	-----	-----	-----
Marketing, communication special events and tourism	2011	N.A.	N.A.	290.000 \$ (10%)
Education	----	-----	-----	-----
Job creation initiative	----	-----	-----	-----
Resident initiative	----	-----	-----	-----
Other	2011	N.A.	N.A.	145.000 \$ (5%)
<i>Total</i>	----	-----	-----	-----

#### 3.2 Source of revenue<sup>3</sup>

Source:

[http://dynamodata.fdncenter.org/990\\_pdf\\_archive/273/273596446/273596446\\_201012\\_9900.pdf](http://dynamodata.fdncenter.org/990_pdf_archive/273/273596446/273596446_201012_9900.pdf)

[Access: 12.02.2012]

Items	Year	revenue (\$)
Program service revenue	----	-----
Special contracts	----	-----
Investment income	----	-----
Fundraising & special events	----	-----
Government Grants	----	-----
Private contributions (auto-taxation)	2011	80.501 \$
Interest	----	-----
Assessment (fee or levy)	----	-----
Rental income	----	-----
Other	----	-----
<i>Total</i>		80.501 \$

<sup>3</sup> This table cannot be filled in all its parts due to the short operating period of Downtown BID.

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

Source:

<http://archive.constantcontact.com/fs079/1011270028105/archive/1109380059536.html>

[Access: 28.03.2012]

Program	Description	Number	Financial sources <sup>4</sup>	
			Public	Private
Attraction of business new to the area	N.A.	N.A.	N.A.	N.A.
Creation of new business (start-ups)	The Downtown BID has started up 42 new business (2010-2011), of which 28 new restaurants. \$21 million have been invested in new restaurants, creating over 500 jobs and absorbing over 75,000 sf.	42	N.A.	N.A.
Retention of business	N.A.	N.A.	N.A.	N.A.
Assistance weak business	N.A.	N.A.	N.A.	N.A.

### 4.2 Services and improvements

Source:

<http://www.bostonbid.org>

[Access: 28.01.2012]

Sondergard M., "Have you noticed a change in downtown Boston? Business Improvement District is having an impact", on-line article in *CommonWealth - Politics, ideas and civic life in Massachusetts*, 22 august 2011.

<http://www.commonwealthmagazine.org/News-and-Features/Online-exclusives/2011/Summer/014-Have-you-noticed-a-change-in-downtown-Boston.aspx>

[Access: 30.01.2012]

<http://archive.constantcontact.com/fs079/1011270028105/archive/1109380059536.html>

[Access: 28.03.2012]

Programs	Description	Item	Financial sources		
			Public	Private	Total
<input type="checkbox"/> Retail Enhancement					
<input type="checkbox"/> Economic Revitalization					
<input checked="" type="checkbox"/> Security and Safety	The Downtown BID has hauled away almost 92.000 pounds of trash and removed more than 2.500 stickers and graffiti sites.	Cleaning	N.A.	N.A.	1.218.000 \$
<input type="checkbox"/> Building Restoration/Renewal					
<input type="checkbox"/> Innovation/Green Technologies					
<input type="checkbox"/> Education and Training					

<sup>4</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.

<input checked="" type="checkbox"/> Job Creation/Social works	Through the <i>Hospitality Ambassador Program</i> , the Downtown BID has created 30 new jobs and it is promoting social works to homeless people's advantage.	30 new jobs	N.A.	N.A.	580.000 \$ <sup>5</sup>
<input type="checkbox"/> Technology Transfer					
<input type="checkbox"/> Capacity Building					
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)					
<input type="checkbox"/> Local produce valorisation					
<input checked="" type="checkbox"/> Cultural enrichment	Thanks to a rich calendar of events, the Downtown BID is promoting a vibrant image of the district, enhancing the general environment and attracting visitors.	Cultural events	N.A.	N.A.	290.000 \$
<input type="checkbox"/> Natural Beauty, Green Space and biodiversity					
<input checked="" type="checkbox"/> Other: <i>Hospitality</i>	Through the <i>Hospitality Ambassador Program</i> , almost 63.000 people have been assisted.		N.A.	N.A.	580.000 \$ <sup>6</sup>

<sup>5</sup> This amount refers to job creation and hospitality (both part of the *Hospitality Ambassador Program*).

<sup>6</sup> This amount refers to job creation and hospitality (both part of the *Hospitality Ambassador Program*).

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations

Source:

<http://www.bostonbid.org>

[http://www.bostonbid.org/resources/member\\_directory.php](http://www.bostonbid.org/resources/member_directory.php)

[Access: 28.01.2012]

Name	Typology (size)	Level of influence <sup>7</sup> (with respect to the size of the organization)
<i>Project Place</i>	Service partner – Social organization	
<i>Pine Street Inn (previous Pine Street and hopeFound)</i>	Service partner – Social organization	
<i>Action for Boston Community Development (ABCD)</i>	Service partner – Social Agency	
<i>Architectural Heritage Foundation</i>	Service partner – Real Estate developer (non-profit)	
<i>Armed Services Recruiting Center</i>		
<i>Boston Center for Independent Living</i>	Service partner – Social Agency	
<i>Boston Department of Neighborhood Development</i>	Service partner – Department of City of Boston	
<i>Boston Harborfest</i>	Service partner – Events	
<i>Boston Housing Authority</i>	Service partner – Public housing authority	
<i>Boston Preservation Alliance</i>	Service partner – Non-profit organization	
<i>Boston Public Schools</i>	Service partner – Education and learning	
<i>Boston Rescue Mission</i>	Service partner – Social Agency	
<i>Bridge Over Troubled Waters</i>	Service partner – Social Agency	
<i>Conservation Law Foundation</i>	Service partner – Environment and healthy	
<i>Grand Lodge of Mass. Freemasons</i>		
<i>McCormack Federal Administration Building</i>		
<i>National Consumer Law Center</i>	Service partner – Non-profit advocacy organization	
<i>New England Center for Homeless Veterans</i>	Service partner – Social Agency	
<i>Road Scholar (formerly Elderhostel)</i>	Service partner – Education and learning	
<i>Sisters Disciples of the Divine Master</i>		
<i>St. Francis House</i>	Service partner – Social Agency	
<i>United States Post Office</i>		
<i>WalkBoston</i>	Service partner – Non-profit organization	

<sup>7</sup> This table cannot be filled due to the short operating period of Downtown BID.

## 5.2 Local elected official and community board members

"Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for."

Source:

<http://www.bostonbid.org/about/neighborhoodadvisoryboard.php>

[http://www.bostonbid.org/about/board\\_staff.php](http://www.bostonbid.org/about/board_staff.php)

[Access: 28.01.2012]

BOARD OF DIRECTORS		
Name	Elected/member	Political role
Rosemarie E. Sansone	President - Downtown Boston BID	
Randi Lathrop	Board of Directors	Civic Leader <sup>8</sup>
Samuel Tyler	Board of Directors	Civic Leader
John J. Gallagher	Board of Directors	Business Leader
Margaret Ann Ings	Board of Directors	Cultural Institution <sup>9</sup>
John Nucci	Board of Directors	Cultural Institution
Scott Brown	Board of Directors	Real Estate Manager
Joseph Concepcion	Board of Directors	Real Estate Manager
Jeffrey Cook	Board of Directors	Real Estate Manager
William Cowin	Board of Directors	Real Estate Manager
Ronald Druker	Board of Directors	Real Estate Manager
David Epstein	Board of Directors	Real Estate Manager
David Greaney	Board of Directors	Real Estate Manager
Andrew Hoar	Board of Directors	Real Estate Manager
Michael L. Murphy	Board of Directors	Real Estate Manager
Dustin Sarnoski	Board of Directors	Real Estate Manager
Kevin Smith	Board of Directors	Real Estate Manager
John H. Spurr, Jr.	Board of Directors	Real Estate Manager
Peter Standish	Board of Directors	Real Estate Manager
Mark Weld	Board of Directors	Real Estate Manager
Jane Williams	Board of Directors	Real Estate Manager
Philip Stamm	Board of Directors	Real Estate
Babak Bina	Board of Directors	Retailer
Christine Dunn	Board of Directors	Retailer
Richard Finn	Board of Directors	Retailer
Ed Goldberg	Board of Directors	Retailer
Katherine Greenberg	Board of Directors	Retailer
Joseph Larkin	Board of Directors	Retailer
Doris Wong	Board of Directors	Retailer
Pamela Messenger	Board of Directors	Association <sup>10</sup>

<sup>8</sup> Civic Leaders deals with city officials and agencies.

<sup>9</sup> Cultural Institution deals with educational, cultural, historical, and religious institutions.

NEIGHBORHOOD ADVISORY BOARD		
Name	Elected/member	Political role
<i>Martha Pierce</i>	Neighborhood Advisory Board <sup>11</sup>	Civic Leader
<i>Andrew Grace</i>	Neighborhood Advisory Board	Civic Leader
<i>Jill Ochs-Zick</i>	Neighborhood Advisory Board	Civic Leader
<i>Councilor Sal LaMattina</i>	Neighborhood Advisory Board	Civic Leader
<i>Councilor Bill Linehan</i>	Neighborhood Advisory Board	Civic Leader
<i>William Good</i>	Neighborhood Advisory Board	Civic Leader
<i>Joanne Massaro</i>	Neighborhood Advisory Board	Civic Leader
<i>Thomas Tinlin</i>	Neighborhood Advisory Board	Civic Leader
<i>Jay Walsh</i>	Neighborhood Advisory Board	Civic Leader
<i>Sgt. Thomas Lema</i>	Neighborhood Advisory Board	Civic Leader
<i>Capt. Bernard O'Rourke</i>	Neighborhood Advisory Board	Civic Leader
<i>James Greene</i>	Neighborhood Advisory Board	Civic Leader
<i>Anthony Singleton</i>	Neighborhood Advisory Board	Business Leader
<i>James Adler</i>	Neighborhood Advisory Board	Business
<i>Bruce Bolling,</i>	Neighborhood Advisory Board	Business
<i>Brian LeMay</i>	Neighborhood Advisory Board	Cultural Institution
<i>Very Rev. Jep Streit</i>	Neighborhood Advisory Board	Cultural Institution
<i>William Beckeman</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Kevin Benedix</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Morris Naggar</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Joseph Pierik</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Kerry Ruckman</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Jay Shoostine</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Jackson Slomiak</i>	Neighborhood Advisory Board	Real Estate Manager
<i>Wildie Ceccherini</i>	Neighborhood Advisory Board	Retailer
<i>Linda DeMarco</i>	Neighborhood Advisory Board	Retailer
<i>Donna DePrisco</i>	Neighborhood Advisory Board	Retailer
<i>Rich Doucette</i>	Neighborhood Advisory Board	Retailer
<i>Bradley Fredericks</i>	Neighborhood Advisory Board	Retailer
<i>Kenneth Gloss</i>	Neighborhood Advisory Board	Retailer
<i>David Lee</i>	Neighborhood Advisory Board	Retailer
<i>Paul Licari</i>	Neighborhood Advisory Board	Retailer
<i>Diane Modica</i>	Neighborhood Advisory Board	Retailer
<i>Margaret Carr</i>	Neighborhood Advisory Board	Resident
<i>Mary Ann Ponti</i>	Neighborhood Advisory Board	Resident

<sup>10</sup> Association deals with social services organizations.

<sup>11</sup> The *Neighborhood Advisory Board* consists of the members of the collaborative partnership promoting *Downtown Boston BID*.

<i>Leo Adorno</i>	Neighborhood Advisory Board	Association
<i>Wendy Lauser</i>	Neighborhood Advisory Board	Association
<i>Robb Zarges</i>	Neighborhood Advisory Board	Association

### 5.3 Owners/tenants

Source:

<http://www.bostonbid.org>

[http://www.bostonbid.org/resources/member\\_directory.php](http://www.bostonbid.org/resources/member_directory.php)

[Access: 28.01.2012]

<http://hubmaps1.cityofboston.gov/egis/Map.aspx?PropertyID=0302141000#>

[Access: 10.02.2012]

<http://origin.library.constantcontact.com/download/get/file/1011270028105-2659/About+the+Downtown+Boston+BID.pdf>

[Access: 29.01.2012]

Typology	Number
Commercial property owners	N.A.
Industrial property owners	-----
Commercial Tenants	N.A.
Resident owners	Residents owners take part in the initiative (they are represented in the Neighborhood Advisory Board), but their number is unimportant.
Community organizations	23
	<b>528</b>

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

Source

<http://www.cityofboston.gov/assessing/search/>

[Access: from 10.02.2012 to 30.03.2012]

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	sqm	\$/sqm	sqm	\$/sqm	sqm	\$/sqm	sqm	\$/sqm
Housing (1 to 3 family residential)	-----	-----	-----	-----	N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)	-----	-----	-----	-----	N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Commerce	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Industry	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Advanced services sector	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Parking	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

### 6.2 Average Market Value

Typology	Before the initiative (2010)	After the initiative (Year) <sup>12</sup>
Housing (1 to 3 family residential)	-----	
Housing (4 to 6 family residential)	-----	
Housing (7 or more family residential, condominium)	N.A.	
Commerce	N.A.	
Industry	N.A.	
Advanced services sector	N.A.	
Parking	N.A.	

### 6.3 Commerce and advanced services sectors

Source:

[http://www.bostonbid.org/resources/member\\_directory.php](http://www.bostonbid.org/resources/member_directory.php)

[Access: 28.01.2012]

<http://www.boston-theater.com/>

[Access: 10.03.2012]

Typology	Units	Renovated Buildings		New Buildings	
		sqm	sqm	sqm	sqm
Mall	1	N.A.	N.A.	N.A.	N.A.

<sup>12</sup> This table cannot be filled due to the short operating period of Downtown BID.

Farmer market	-----	N.A.	N.A.	N.A.	N.A.
Small retail	Over than 400	N.A.	N.A.	N.A.	N.A.
Handcrafts	Over 150 independent jewelers and artisans all over the area	N.A.	N.A.	N.A.	N.A.
Business financial	Almost 25 blocks	N.A.	N.A.	N.A.	N.A.
Administration buildings	<i>Government Center is just outside of the BID's boundaries</i>	N.A.	N.A.	N.A.	N.A.
Insurance	Over than 50	N.A.	N.A.	N.A.	N.A.
Restaurants	Over than 120	N.A.	N.A.	N.A.	N.A.
B&B	-----	N.A.	N.A.	N.A.	N.A.
Hotel	10 <i>(some of them major hotels – Ritz Hotel, Ames Hotel, Hyatt Regency Boston - and one of them is a historical landmark – Omni Parker House Hotel)</i>	N.A.	N.A.	N.A.	N.A.
Cinema	2 <i>(AMC Lowes Boston Common, Orpheum Theatre)</i>	N.A.	N.A.	N.A.	N.A.
Museum	5 <i>Old State House, Old South Meeting House, The Boston Museum, Dreams of Freedom, The Freedom trail foundation)</i>	N.A.	N.A.	N.A.	N.A.
Theatres	5 <i>(Paramount Center, Modern Theatre, Orpheum theatre, Boston Opera house, Boston Lyric Opera)</i>	N.A.	N.A.	N.A.	N.A.
Universities/campus	Emerson College Suffolk University <i>(including housing and student apartments)</i>	N.A.	N.A.	N.A.	N.A.

## 6.4 Community facilities

Source

<http://www.mbta.com/>

[https://tools.usps.com/go/POLocatorAction\\_input](https://tools.usps.com/go/POLocatorAction_input)

<http://www.cityofboston.gov/>

<http://www.bpl.org/>

<http://www.thehubway.com/stations>

[Access: 10.03.2012]

Typology	Units	Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after district (sqm or number)
		private	public	private	public	
Schools	-----	N.A.	N.A.	N.A.	N.A.	N.A.
Public libraries	<i>In the area there are many academic and special libraries.</i>	N.A.	N.A.	N.A.	N.A.	N.A.
Post office	6 Post Offices (including the main building in Post Office Square)	N.A.	N.A.	N.A.	N.A.	N.A.
Hospital	2 health centres	N.A.	N.A.	N.A.	N.A.	N.A.
Safety and Security	<i>There are not Police or Fire stations in the area nor other security services, but they are located just outside the BID's boundaries.</i>	N.A.	N.A.	N.A.	N.A.	N.A.
Job center	-----	N.A.	N.A.	N.A.	N.A.	N.A.

Public park	Boston Common (right outside the BID's boundaries)	N.A.	N.A.	N.A.	N.A.	N.A.
Train Station	-----	N.A.	N.A.	N.A.	N.A.	N.A.
Bus station	-----	N.A.	N.A.	N.A.	N.A.	N.A.
Bike car sharing service	3 bike-sharing stations	N.A.	N.A.	N.A.	N.A.	N.A.
Housing	-----	N.A.	N.A.	N.A.	N.A.	N.A.

## 6.5 Accessibility

Source:

<http://www.mbta.com/>

<http://www.bostonbid.org>

[Access: 28.01.2012]

Distance from Central Boston	Average Time	Average Km
By subway	-----	-----
By bus	-----	-----
By car	-----	-----
By rail	-----	-----

## 6.6 Supply chain: supply of local products

Products	Supplier (origin)	Distance from the area
Foods	N.A.	N.A.
Handcrafts	N.A.	N.A.
Others	N.A.	N.A.

## 6.7 Environmental data

*The Downtown Boston BID does not have specific interest in environmental issues. Members of the Board of Directors assured they don't apply environmental indicators.*

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N.A.	N.A.	N.A.
Ratio of green space to built-up area	N.A.	N.A.	N.A.
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	N.A.	N.A.	N.A.
% use of space over 24 hours	N.A.	N.A.	N.A.
Density level per square metre of scheme	N.A.	N.A.	N.A.
% of recycled material used in the built environment	N.A.	N.A.	N.A.
% of non-renewable resources	N.A.	N.A.	N.A.

consumed in current scheme			
LEEDs, green building initiatives undertaken ( <a href="http://www.usgbc.org">www.usgbc.org</a> )	N.A.	N.A.	N.A.
Energy efficiency measures undertaken	N.A.	N.A.	N.A.
Other environmental indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.8 Social data

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N.A.	N.A.	N.A.
Social service personnel per 1,000 population	N.A.	N.A.	N.A.
Occupancy levels in residential area (voids and vacant properties)	N.A.	N.A.	N.A.
% of hospital recovery	N.A.	N.A.	N.A.
Other social indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.9 Geographical information (GIS based)

Source

<http://www.cityofboston.gov/maps/>

[Access: 09.02.2012]

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis

## A. Historical maps

(to be completed)

## B. Land use map



## C. Zoning map



#### D. Community facilities



##### COMMUNITY FACILITIES

- Heritage - Building
- Heritage - Public area
- Historical garden or graveyard
- Part of public garden
- Square
- Pedestrian area
- Health centers
- Hotel
- Commercial area
- Theatre and cinema
- Academic library
- Special library
- Special library - Institutional
- Special library - Law
- Special library - Medical
- Private university
- Civic building or hall
- Post office

#### E. Infrastructure and transport



##### INFRASTRUCTURE AND TRANSPORT

- MSTA - silver line
- MSTA - blue line (subway)
- MSTA - green line (subway)
- MSTA - orange line (subway)
- MSTA - red line (subway)
- MSTA - subway station
- MSTA - bus route
- MSTA - bus stop
- MSTA - node
- Parking
- Freedom trail
- Bicycle route
- Bike sharing stop
- Pedestrian area

#### F. Projects and initiatives in the area

(to be completed)

## 7 VII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

*Date:* 08.02.2012

*Day of the week:* Wednesday

*Time:* 12:45 am

#### Notes

The Downtown BID serves an area where a wide range of architectural and historical landmarks are located, therefore it faces important heritage issues.



### Picture n.2

*Date:* 08.02.2012

*Day of the week:* Wednesday

*Time:* 10:45 am

#### Notes

The Downtown area is characterized by a rich variety of options; the BID faces the Boston Common with different activities, shopping and retail activities, cultural and historical institutions, leisure and entertainment, etc.





### Picture n.3

*Date:* 08.02.2012

*Day of the week:* Wednesday

*Time:* 11:45 am

#### *Notes*

The Downtown area facing Chinatown is less noisy and crowded than the rest, less clean and safe, and it is characterized by a lower architectural quality.



### Picture n.4

*Date:* 08.02.2012

*Day of the week:* Wednesday

*Time:* 11:45 am

#### *Notes*

The Downtown BID covers part of Chinatown district, therefore it includes several traditional retail activities and a dynamic Chinese population.





### Picture n.5

*Date:* 08.02.2012

*Day of the week:* Wednesday

*Time:* 12:45 am

#### Notes

In the core areas of Downtown BID – the Theatre District and the Downtown Crossing – there are architecture treasures restored to their original glory (the Paramount, the Modern Theatre and the Boston Opera House in the Theatre District), but also building yards and works in progress.



### Picture n.6

*Date:* 10.02.2012

*Day of the week:* Friday

*Time:* 12:45 am

#### Notes

There are many people on the street (residents, visitors, workers, etc.); the ambassador cleaning the street testifies the existence of the Downtown BID. Along this stretch, Washington Street is quite clean, vibrant but safe.





### Picture n.7

*Date:* 10.02.2012

*Day of the week:* Friday

*Time:* 12:45 am

#### *Notes*

The Downtown Crossing is crowded and noisy, there are many people having their lunch or walking to and from work.

There are many stands with the Downtown BID logo.

The Downtown BID Ambassador is easily recognizable, he provides information and helps visitors.



### Picture n.8

*Date:* 10.02.2012

*Day of the week:* Friday

*Time:* 13:30 am

#### *Notes*

In the area there are several vacant commercial properties – vacant retail spaces, on sale or for lease – and office spaces available. Different real estate developers are promoting the vacant properties.



### Picture n.9

*Date:* 10.02.2012

*Day of the week:* Friday

*Time:* 13:15 am

*Notes*

Despite the efforts to address and help homeless people in the area, far from the Downtown Crossing there are many homeless people.



### Picture n.10

*Date:* 11.02.2012

*Day of the week:* Saturday

*Time:* 14:15 am

*Notes*

The area between West Street and Bromfield Street is a meeting place for young South Americans; here the architectural quality is lower and there are many vacant properties.





### Picture n.11

Date: 11.02.2012

Day of the week: Saturday

Time: 14:45 am

Notes

All around the Ladder District there are many jewelleries – one of the historical retail activities in the Downtown –, but this unique retail district of over 200 independent jewellers and artisans doesn't share any retail strategy or initiative.



### Picture n.12

Date: 11.02.2012

Day of the week: Saturday

Time: 14:45 am

Notes

All around the Ladder District there are several historical and traditional retail activities.





**Picture n.13**

*Date:* 11.02.2012

*Day of the week:* Saturday

*Time:* 14:45 am

*Notes*

The site of the former Filene's department store is a stalled real-estate development; it represents a serious issue for the activities in Downtown Crossing and it affects the effectiveness of any intervention.





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study** (denomination):

**Researcher:**

## Survey Form

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# 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

## 1.1 General Information

ZONING CODE	Specify the zoning map (commercial district, business district, neighborhood district, etc..) in which the initiative works: <b>Assembly Square Mixed-Use District</b> <a href="http://www.somervillema.gov/.../ZoningMap">http:// www.somervillema.gov/.../ZoningMap</a>	
Topical areas	<input checked="" type="checkbox"/> Partnership agreement	
	<input type="checkbox"/> Community Development	
	<input type="checkbox"/> Urban Agricultural Linkages	
	<input type="checkbox"/> Social Enterprise	
	<input type="checkbox"/> University-focused	
	<input type="checkbox"/> Non-profit assistance/development	
	<input type="checkbox"/> Business incubators	
Location	Neighbourhood	<b>Assembly Row (under construction)</b>
	ZIP Code	<b>02145</b>
	City	<b>Somerville</b>
	County	<b>Middlesex</b>
	State	<b>Massachusetts</b>
Start-up Source: <b>FRIT*</b>	Year	<b>From 2005 with Assembly Square Mall (built) + Assembly Row (under construction)</b>
Years in operation Source: <b>FRIT</b>	Year	<b>7 Year – 2005/2012 Assembly Square Mall + Assembly Row (under construction)</b>
Numbers of renewal Source: <b>FRIT</b>	Year	<b>1 Assembly Square Mall</b>
Dimension Source: <b>FRIT and Factfinder2</b>	Area (sq. Km)	<b>66.5 acres (269000 m<sup>2</sup> under construction) + Assembly Mall 7.62 acres (30843,8 m<sup>2</sup> built) – Total Area with Park and Parking 145 acres</b>
	Residents	<b>Total Pop. 8.485 (<a href="http://factfinder2.census.gov">http://factfinder2.census.gov</a> - Track350103/04 – 2010)</b>
Partnership Institutional Typology	Typology	
	<input type="checkbox"/> BID: Business Improvement District	
	<input type="checkbox"/> PA: Public Agency	
	<input type="checkbox"/> CDC: Community Development Corporations	
	<input type="checkbox"/> SE: Social Enterprise	
	<input type="checkbox"/> NPOMS: Non Profit Organization for implementing the Main Street initiative	
	<input type="checkbox"/> NPCBPO: Non Profit Community-Based Planning Organization other than CDC, SE, MS	
	<input checked="" type="checkbox"/> TOD	
		The TOD program is a smart growth initiative by the state with the purpose of providing financial assistance for parking facilities, pedestrian and bicycle facilities, and housing. Chapter 291 of the Acts of 2004. Draft guidelines were established in January 2005 by the Office of Commonwealth Development in cooperation with the Executive Office of Transportation and DHCD.
<input type="checkbox"/> Other (specify)		



# MARIE CURIE IRSES - **CLUDs PROJECT**



Partnership composition Source: City of Somerville Web site**	Name	Public/Private/NGO	% Initial Capital Invested
	Federal Realty Investment Trust	Private	
	Ikea	Private	
	Commonwealth of Mass.	Public	
	City of Somerville	Public	
Number of board directors Source: FRIT	7 Members Federal Realty Investment Trust		

\*FRIT Federal Realty Investment Trust ([www.federalrealty.com](http://www.federalrealty.com))

\*\* City of Somerville (<http://www.somervillema.gov>)



## Abstract of the initiative

(Source/s: FRIT, City of Somerville, Commonwealth Of Massachusetts, Web Resource)

### The case study in brief (What is the case study, max 15 rows)

Assembly Square is located along and to the west of the Mystic River bordered by Charlestown to the south and the Somerville neighborhood of Ten Hills to the North. The district's western border runs along Interstate 93. Assembly Square, a unique neighborhood district with a land area of 145 acres, is so named after the Ford Motor assembly plant that opened in 1926 and was an important employer in the Boston Metropolitan Area, particularly during World War II. The assembly plant was one of many industrial businesses that thrived in Assembly Square during the 1900's. Boston & Maine Railroad also owned large tracts of land in the district and many of the businesses received shipments by rail. The land was crisscrossed by spur tracks and there were few roadways. The Ford Motor Plant closed in 1958 and by the late 1970's, a number of other industrial businesses had closed as well. The Assembly Square district is Somerville's largest commercial and industrial district with the greatest potential for redevelopment. Over the past two years, the City undertook an aggressive planning and redevelopment effort designed to convert this former industrial district to a transit oriented mixed-use "urban village." Assembly Square is directly accessible from Interstate 93 and State Route 28. It is approximately 1.25 miles from downtown Boston and a ten-minute walk from the Orange Line MBTA stations at Sullivan Square and Wellington. The Orange Line and two commuter rail lines pass through the district. Assembly Square also contains waterfront parcels located along the banks of the Mystic River. In 2000, the City completed a planning study of the district that recommended a total build out over 20 years of at least 6 million square feet of commercial and residential uses. Various public improvements are planned, including a new Orange Line MBTA station within the district, roadway improvements, renovations and expansion of a waterfront park, and improvements to pedestrian and bicycle access. The planning and redevelopment strategy for Assembly Square is to reduce reliance on retail use by encouraging higher density office, R&D, and residential uses. The primary use in Assembly Square recently has been large-scale retail. The City and community have shown a preference for a mixed-use development including office and residential uses centered on a new transit station.

### The Challenge (Why the case worth discussing, max 5 rows)

The aim of the project is to revitalize an area that is of particular importance in the development plan of the city. Its proximity to Boston and Cambridge make Somerville a gravitational center capable of attracting tourism and new investment. this is the goal that we aim to achieve with this project, which not only create a new district but also a new use and capable of generating new functions for the city needed for its management and the possibility of developing through specific programs, the infrastructures that will enable the city to become a truly strategic hub in the Boston metropolitan area. The Public Private Partnership between the city and Develop allowed to share a journey to reach this goal within a few years that will change the face of the whole area. The resulting plan envisions a vibrant, mixed-use, urban neighborhood and commercial center providing significant local and regional benefits including 19,000 new jobs, increased tax revenues, market rate and affordable housing, improved access to transportation. Furthermore, the proximity to the shores of the Mystic River, allows ownership by the citizens of new recreational spaces opening the city to its waterfront.

The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)

The key industries in Somerville are health services, retail, business services and creative design. Somerville's local economic base is heavily influenced by three factors: its dense residential population, the nature of its commercial and industrial building stock, and its proximity to Boston. The high residential population supports vibrant retail (and eating/drinking) clusters across a number of small and medium size commercial squares. The service industries, health, business and creative design, are heavily integrated both through suppliers and customers with regional hubs in Boston and Cambridge. Somerville's small land area and dispersed development areas are better matched with niche firms and specialized offices than large headquarters, R&D facilities or big manufacturing operations. While not large in terms of people employed, a diverse group of industrial firms maintain the city's history of artisans craftsmanship.

The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)

Principles of the Long Term Vision shall include an articulation of best efforts to accelerate the development of office and research and development space in the Assembly Square, in light of the importance of those uses to the tax base and the creation of job opportunities in the City. Best efforts shall include, but are not limited to, creation of an office development strategy and the development of marketing plans aimed at potential research and development and office tenants; outreach to state and industry officials emphasizing the opportunities for development in the AS; outreach to capable investment and development partners and regular, timely review of these strategies by FRIT as economic and market conditions change.

## 1.2 Map

(Source: .....)





## Budget size

(Source: FRIT and City of Somerville)

Expenditure*	\$ 1,219,318,653 in construction investment + \$ 111,506,032 in Public infrastructure
Revenue*	\$ 24 million in annual municipal tax revenue \$16.7 million in annual state tax revenue
Total Budget	\$ 1,330,824,685 (construction investment and public infrastructure) \$ 40,7 million (tax revenue)

\*Amounts provided for the completion of construction.

## 1.3 Vacancy rate

(Source: FRIT)

Vacancy	%	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm)	57,2%*	-	42,8%
Vacant housing property (sqm)	Under Construction	-	-
Vacant land (sqm)	89%	-	11%

\*Assembly Square Marketplace

## 1.4 Strategic Priorities

(Source: FRIT and City of Somerville)

Priorities	Description
<input type="checkbox"/> Retail Enhancement	The project provides for the intended use for that when they open new stores, along with Ikea, which is the attraction of the place, will be to strengthen the sales network of the existing Assembly Mall.
<input type="checkbox"/> Economic Revitalization	The mall that currently exists was originally the Ford plant, which transformed into a supermarket distribution center before being converted into the mall. The cornerstone of the urban renewal plan was the rehabilitation of the former auto assembly plant into a retail mall known as "Assembly Square Mall". In 2005, the Federal Realty Investment Trust (FRIT) purchased the Assembly Square Mall and other property adjacent to the mall; In 2006, FRIT redeveloped the mall and opened the newly refurbished mall as Assembly Square Marketplace. which represents the first form of economic revitalization area and that will reach full completion with the construction of new retail areas provided in Assembly Row.
<input type="checkbox"/> Security and Safety	-
<input type="checkbox"/> Building Restoration/Renewal	2005 – 2006 Federal Realty Investment Trust redeveloped the Mall.
<input type="checkbox"/> Innovation/Green Technologies	Maximize energy efficiency and renewable energy opportunities. Support energy conservation strategies, local clean power generation, distributed generation technologies, and innovative industries. Reduce greenhouse gas emission and consumption of fossil fuels. This Project has been planned such that the District is expected to meet the certification requirements for LEED-ND (Neighborhood Development), including mixed use, redevelopment of a brownfield site, the addition of a new rapid-transit station (MBTA Orange Line), and abundant pedestrian and bicycle connections. A working draft of an LEED-ND Scorecard, included projects a total of 69 points for the project, which would qualify for LEED-Gold designation pursuant to the latest draft of the LEED-ND program guidelines. The Developer's commitment to pursue LEED-ND certification is stated in the Draft Environmental Impact Report filed with the Massachusetts Environmental Policy Act (MEPA) office on June 2, 2008 and is subsequently acknowledged in the August 15, 2008 Certificate of the Secretary of Energy and Environmental Affairs on the Draft Environmental Impact Report.
<input type="checkbox"/> Education and Training	-
<input type="checkbox"/> Job Creation/Social works	Attract businesses and jobs to locations near housing, infrastructure, and transportation options. Promote economic development in industry clusters. Support the growth of local businesses, including sustainable natural resource-based businesses, such as agriculture, forestry, clean energy technology, and fisheries. Upon completion of the Project, approximately 9,700 permanent new jobs will be created, and approximately 10,300 construction jobs will be needed to build the Project. The analysis in this Proposal anticipates continued employment expansion in the Commonwealth. Assembly on the Mystic will enhance



	the Commonwealth's ability to retain existing employers and attract substantial new economic investment.
<input type="checkbox"/> Technology Transfer	-
<input type="checkbox"/> Capacity Building	-
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	The Project is strategically located to provide smart growth benefits such as redeveloping an existing urban site, investing in a new transit station, and increasing the pedestrian facilities in and around the project site. The project will provide a mix of rental and condominium housing options including affordable housing units pursuant to the City's Inclusionary Zoning Ordinance. Maintain and expand transportation options that maximize mobility, reduce congestion, conserve fuel and improve air quality. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling, and walking. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development consistent with smart growth objectives.
<input type="checkbox"/> Local produce valorisation	-
<input type="checkbox"/> Cultural enrichment	Construction on the theatre building is expected to begin in the spring of this year (2012) and open with the first phase of the Assembly Row development.
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	The project will protect and enhance the Mystic River Reservation and provide connections to adjacent open space. The project also includes the creation of pocket parks and landscaped plazas, thus increasing the quantity and quality of urban open space in Somerville. The project promotes development that respects and enhance Somerville's riverfront. The project will improve the water quality in the Mystic River and result in remediation of a brownfield. The Project is consistent with several objectives associated with this plan as it will ensure that the waterfront along this industrial and commercial portion of the Mystic River is improved so as to act as a connection between abutting parcels of open space and public access land along the river. The new Riverfront Park will provide a vital link in the greenway corridor envisioned in the Master Plan. The existing DCR land as well as the additional 1.8 acres of waterfront land to be conveyed from the Developer to DCR in exchange for 1.5 acres of upland will increase the recreational opportunities along the river and will be an asset in drawing the public to the area and will provide natural areas for wildlife habitat. Additionally, the CSO and I/I improvements that are part of the Project will improve water quality and open the door for increased water use along the Mystic River.

## 1.5 Private sector involvement

(Source: .....)

- All Business enterprises are associated: ☐ if not indicate the % \_\_\_\_
- All merchants are associated : ☐ if not indicate the % \_\_\_\_
- Other private entities (no profit) ☐ if not indicate the % \_\_\_\_

## 1.6 Public investment programs\*

(Source: FRIT, City of Somerville, Commonwealth of Massachusetts)

Policy focus for public investment program	Description
Tax policy focus	On June 12, 2008, the so-called <b>I-Cubed</b> legislation, amending St. 2006, c.293, §§ 5-12 (I-Cubed) was signed into law authorizing public infrastructure investment of up to \$250 million for a development project in Massachusetts. See St. 2008, c. 129. Final regulations have recently been issued by the Secretary of Administration and Finance and the Commissioner of Revenue. The purpose of the legislation is to support new job growth and economic development by providing innovative improvements required to support major new private development, whereby the Commonwealth of Massachusetts, the municipality and the private developer share the cost and risk associated with the construction of public infrastructure has to be approved by the municipality, the Secretary of Administration and Finance and MassDevelopment and meet the criteria set forth in the statute and regulations.



Fiscal policy focus	<p>The primary goals of Massachusetts' Economic Development Incentive Program (EDIP) and Somerville's Tax Increment Financing (TIF) program are job creation and growth of the local commercial tax base. The Commonwealth of Massachusetts has enabled certain communities to utilize TIF for key commercial redevelopment projects. Since 1994 Somerville has employed the state's EDIP program on a selective basis to offer TIF and facilitate redevelopment of industrial and commercial properties that are blighted or are located in blighted areas. The City obtained approval for five private sector projects to become Economic Opportunity Areas (EOAs) under the state's Economic Development Incentive Program. This approval enabled the city to utilize TIF and to qualify the businesses located in the EOA for a state Investment Tax Credit. Nationally the TIF program is used for district-based improvements. However, in Massachusetts TIF is used as a tax incentive for developers who invest in economic distressed properties. TIF enables an applicant to make substantial improvements to a building or property without immediately being burdened by increased taxes related to these improvements. The additional local property tax assessment that results from the development investment and project improvements is phased-in over a period of years rather than added at the immediate completion of the project.</p>
Economic development organizations	-
University focus	-
Recruitment	-
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	-
Credit Access	<p>The intent of I-Cubed financing program is that the new state tax revenues generated from the project cover the costs of the public infrastructure improvements needed to support the project. To that end, only new state tax revenue or revenue that would be lost to the state if the project were not developed will be included in the evaluation. The following tax revenue will not be included: state tax revenue that replaces lost revenues from businesses that were replaced by the new economic development project; existing state tax revenues that relocate from another part of the state into the economic development district unless it can be shown that the business would have relocated out of state but for the new project; or state tax revenues from new or expanded businesses within the economic development district that replace other similar businesses within the state.</p>
Local Welfare Policy	<p>The city's economic revitalization plan of Somerville, visible from the zoning map of itself, represents an opportunity to revitalize the local economy through state instruments which will be followed not only an economic improvement of the community, but also by incrementing profits taxes measuring the maintenance of services at this time in the form of extra taxes levied on each citizen. Somerville supports actions aimed at creating increased opportunities for people to become personally involved in a sharing and caring society. A Community Development Plan (CDP) follows a specific framework outlined by the state, setting locally-defined priorities for the location, type, and quantity of new housing units, open space to be protected, commercial and industrial economic development, and improvements to transportation through Massachusetts Executive Order 418. The overall vision of this community development plan is a vision of a strong, diverse, and vibrant community: a healthy mix of people, businesses, and organizations supported by and in turn helping to support high quality neighborhoods, transportation, municipal services, civic institutions, and open spaces. Somerville's future presents an opportunity to develop in a way that blends the best of both worlds of city and suburb.</p>



<p><b>Urban Planning Policy</b> (<i>property rights, land use change, zoning, TDR, preservation, etc.</i>)</p>	<p>The Planning Division works with the residential and business communities to improve the quality of life and living environment through supporting sustainable growth that contributes to the tax base, expands job opportunities for residents and ensures a high level of services. The Staff strives to enhance relationships with residents and neighborhood organizations and to expand participation in the planning process by providing information and technical assistance to the City's residents, property owners, neighborhood groups, and developers. Support the construction and rehabilitation of homes to meet the needs of people of all abilities, income levels, and household types. Build homes near jobs, transit, and where services are available. Foster the development of housing, particularly multifamily and smaller single-family homes, in a way that is compatible with a community's character and vision and with providing new housing choices for people of all means. Maintain and expand transportation options that maximize mobility, reduce congestion, conserve fuel and improve air quality. Prioritize rail, bus, boat, rapid and surface transit, shared-vehicle and shared-ride services, bicycling, and walking. Invest strategically in existing and new passenger and freight transportation infrastructure that supports sound economic development consistent with smart growth objectives.</p>
--	--

\* The global crisis and the vast scope of the project have delayed the commencement of work.

Following are the main steps of the commitment to the community:

- New Assembly Square orange Line T-station
- Realignment of Assembly Square Drive
- Off-site traffic mitigation
- Improved pedestrian and bicycle access
- Improved access to an improved Mystic River Waterfront

Environmental commitments:

- Inclusion of affordable housing
- \$ 250,000 contribution to Somerville Affordable Housing Trust

Other commitments to the community:

- \$ 2,9MM contributed to-date for parks improvements and other municipal projects
- contributed to restoration of the east Somerville Community School
- FRIT serves on the board of the Chamber of Commerce.



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

2.1 Demographic and housing characteristics

2.2 Labor Market

2.3 Overall socioeconomic data



### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

(Source: .....)

Items	Year	Expenditure (\$)		Total
		Public	Private	
General & administrative	-	-	-	-
Social services	-	-	-	-
Capital improvements	-	-	-	-
Streetscape/ sidewalk maintenance and repair	-	-	-	-
Graffiti removal	-	-	-	-
Beautification & Horticulture	-	-	-	-
Holiday lighting	-	-	-	-
Sanitation	-	-	-	-
Security	-	-	-	-
Marketing, communication special events and tourism	-	-	-	-
Education	-	-	-	-
Job creation initiative	-	-	-	-
Resident initiative	-	-	-	-
Other (Access Roads and Connecting - First Bond Phase)*	2009/11	\$ 37.000.000	\$ 13.621.754	\$ 50.621.754

\*The First Bond Phase of Public Infrastructure Improvements to accompany the Economic Development Project includes construction, reconstruction and relocation of portions of Assembly Square Drive to create a newly aligned and continuous connection from Route 28 (Fellsway) at the northern limits of the Project to Mystic Avenue to the south. These infrastructure improvements include both roadway and underground utility construction and upgrades that will support both the IKEA phase of the Project as well as subsequent phases of the development. Below are brief descriptions of the infrastructure improvements for the First Bond Phase.

#### 3.2 Source of revenue

(Source: .....)

Items	Year	Revenue (\$)
Program service revenue	Each Year*	\$ 40,7 million
Special contracts	-	-
Investment income	-	-
Fundraising & special events	-	-
Government Grants	-	-
Private contributions	-	-
Interest	-	-
Assessment (fee or levy)	-	-
Rental income	-	-
Other	-	-

\*The importance of the project is not only limited to redevelopment, but also to the revenue that the whole area will get at closure of the project. The fees which will be delivered will repay the state fund for infrastructure and allow the city of Somerville to maintain services without burdening families' economic status.

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

(Source: Federal Realty Investment Trust)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	Private	-	-	X
Creation of new business (start-ups)	2006 Assembly Mall - 500 New Jobs 2014 Ikea (First Step) - 500 New Jobs* Full development - 14.000 New Jobs**	-	-	X
Retention of business	-	-	-	-
Assistance weak business	-	-	-	-

\* IKEA project: 500 full- and part-time jobs are needed for daily operations of the planned Somerville store.

\*\* Full development of Assembly Square will create 14.000 new office, retail and professional jobs. At this time, preliminary leasing efforts have generated a list of initial prospects that roughly corroborate this understanding. This list includes large businesses engaged in software, biotech/R&D, financial services, advertising, law, architecture/ engineering, health care, government, and other professional consulting fields.

### 4.2 Services and improvements

(Source: .....)

Programs	Description	Item	Financial sources	
			Public	Private
<input type="checkbox"/> Retail Enhancement	-	-	-	-
<input type="checkbox"/> Economic Revitalization	-	-	-	-
<input type="checkbox"/> Security and Safety	-	-	-	-
<input type="checkbox"/> Building Restoration/Renewal	-	-	-	-
<input type="checkbox"/> Innovation/Green Technologies	-	-	-	-
<input type="checkbox"/> Education and Training	-	-	-	-
<input type="checkbox"/> Job Creation/Social works	-	-	-	-
<input type="checkbox"/> Technology Transfer	-	-	-	-
<input type="checkbox"/> Capacity Building	-	-	-	-
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	-	-	-	-
<input type="checkbox"/> Local produce valorisation	-	-	-	-
<input type="checkbox"/> Cultural enrichment	-	-	-	-
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	-	-	-	-

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations

(Source: City of Somerville - Federal Realty Investment Trust – Mystic River Task Force - Step)

Name	Typology (size)	Level of influence (with respect the size of the organization)
Mystic River Task Force	Citizens Association	High
Step	Citizens Association	Medium

### 5.2 Local elected official and/or community board members

(Source: City of Somerville)

Name	Elected/member	Political role
Planning Board	5 Member	Decision-making
-	-	-
-	-	-

### 5.3 Owners/tenants

(Source: Federal Realty Trust Investment- [www.federalrealty.com](http://www.federalrealty.com))

Typology	Number
Commercial property owners	-
Industrial property owners	-
Commercial Tenants	n. 7 in Assembly Mall
Resident owners	-
Community organizations	-

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

(Source: .....)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Housing	-	-			228.068,04	-
Commerce	-	-	30843,8	-	72.021,78	-
Industry	-	-	-	-	-	-
Advanced services sector/Office*	-	-	-	-	165975,93	-
Parking	-	-	n. 1937**	-	n. 9174**	-

\*The illustrative tenant mix above is based on the Developer's prior experience and general expectations based on market conditions. At this time, preliminary leasing efforts have generated a list of initial prospects that roughly corroborates this understanding. This list includes large businesses engaged in software, biotech/R&D, financial services, advertising, law, architecture/ engineering, health care, government, and other professional consulting fields.

\*\*The number of parking spaces is expressed in number of post available.

### 6.2 Average Market Value

(Source: .....)

Typology	Before the initiative (Year)	After the initiative (Year)
Housing	-	-
Commerce	-	-
Industry	-	-
Advanced services sector	-	-
Parking	-	-

### 6.3 Commerce and advanced services sectors

(Source: .....)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Mall	-	-	30843,8	-	-	-
Farmer market	-	-	-	-	-	-
Small retail	-	-	-	-	-	-
Handcrafts	-	-	-	-	-	-
Business financial	-	-	-	-	-	-
Administration buildings	-	-	-	-	-	-
Office	-	-	-	-	165.975,93	-
Insurance	-	-	-	-	-	-
Restaurants	-	-	-	-	-	-
B&B	-	-	-	-	-	-
Hotel	-	-	-	-	8.803,49	-
Cinema	-	-	-	-	5.792,5	-
Museum	-	-	-	-	-	-
Theatres	-	-	-	-	-	-



<b>Universities / campus</b>	-	-	-	-	-	-
------------------------------	---	---	---	---	---	---

#### 6.4 Community facilities

(Source: .....)

Typology	Total (sqm or number)		Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after project (sqm or number)
	private	public	Private	public	private	public	
Schools	-	-	-	-	-	-	-
Public libraries	-	-	-	-	-	-	-
Post office	-	-	-	-	-	-	-
Hospital	-	-	-	-	-	-	-
Safety Security	-	-	-	-	-	-	-
Job center	-	-	-	-	-	-	-
Public park*	-	-	-	-	X	X	-
Train Station	-	-	-	-	-	-	-
Bus station	-	-	-	-	-	-	-
Bike - Car sharing service	-	-	-	-	-	-	-
Housing**	-	-	-	-	-	X	-

\* The park will come to complete the entire project. The importance of designing the banks of the Mystic River is double. On the one hand the appropriation by the residents of a waterfront and currently lacks the connection with other parts of the protected area and parts of the bike path included in the circuit of national trails.

\*\*The number of condominium or apartment residential units to be included in any proposed residential facility, and the number of such units to be restricted as affordable to individuals and families with incomes at or below 80% of area-wide median income levels; the Developer is working with the City of Somerville to determine the number of affordable units.

#### 6.5 Accessibility

(Source: .....)

Distance from Downtown	Time	Km
By subway (Under Construction)*	-	-
By bus	21'	4,1 miles
By car	10'	3,5 miles
By rail	-	-

\*A new MBTA Orange Line station is planned for the area between Wellington and Sullivan Square to provide regional transit access and an alternative to auto traffic for those traveling to and from Assembly Square. The MBTA plans to hold the final design meeting in the spring of 2011. The project is on schedule to be bid by the spring of 2011 with construction expected to be complete in 2013.

#### 6.6 Supply chain: the supply of local products

(Source:.....)

Products	Supplier (origin)	Distance from the area
Foods	-	-
Handcrafts	-	-
Others	-	-

#### 6.7 Environmental data

(Source: .....)

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	-	-	-



Ratio of green space to urban form	-	-	-
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	-	-	-
% use of space over 24 hours	-	-	-
Density level per square metre of scheme	-	-	-
% of recycled material used in the built environment	-	-	-
% of non-renewable resources consumed in current scheme	-	-	-
LEEDs, green building initiatives undertook (www.usgbc.org)	-	-	-
Energy efficiency measures undertook	-	-	-
Other environmental indicators specifically applied to the initiative	-	-	-

## 6.8 Social data

(Source: .....)

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	-	-	-
Social service personnel per 1,000 population	-	-	-
Occupancy levels in residential area (voids and vacant properties)*	-	-	-
% of hospital recovery	-	-	-
Other social indicators specifically applied to the initiative	-	-	-

\* (<http://factfinder2.census.gov/>)

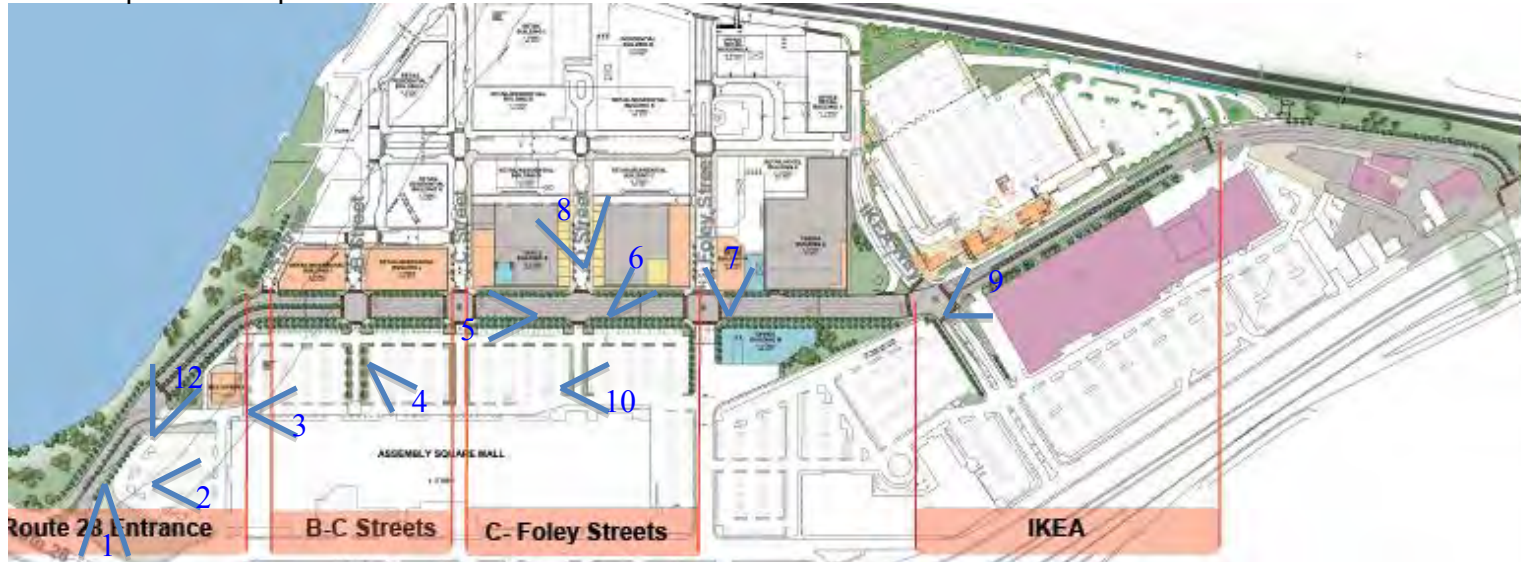
## 6.9 Geographical information (GIS based)

(Source: .....)

Layer	Description
Land use map	www.mass.gov
Zoning map	www.mass.gov
Community facilities	www.mass.gov
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	www.mass.gov
Pedestrian routes and amenities	www.mass.gov
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	www.mass.gov
Green spaces	www.mass.gov
Connectivity grid	Desk analysis

## 7 VIII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points





### Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

#### Picture n.1

Date 9/2/12

Day of the week: Thursday

Time: 11:45

Notes: The area lies adjacent to the residential part of town, in the future by becoming a real point of attraction.



#### Picture n.2

Date 9/02/12

Day of the week: Thursday

Time: 11:47

Notes: **Assembly Square Mall**, is the first part of the project found and renovated in 2006 by FRIT



#### Picture n.3

Date: 9/02/12

Day of the week: Thursday

Time: 11:50

Notes: The mall is the restoration of the Ford factory machinery. The structure after the restructuring has remained unchanged externally.



**Picture n.4****Date:** 9/02/2012**Day of the week;** Thursday**Time:** 11:55**Notes:** The relevance of the Mall parking lot divided by Row Assembly under construction.**Picture n.5****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:00**Notes:** The first Bond Phase road infrastructure for the project as required by the project.**Picture n.6****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:10**Notes:** Work on construction sites Project

**Picture n.7****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:15**Notes:** Work on construction sites Project**Picture n.8****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:20**Notes:** Work on construction sites Project**Picture n.9****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:25**Notes:** The new infrastructure

**Picture n.10****Date:** 9/02/2012**Day of the week:** Thursday**Time:**12:30**Notes:** The Assembly Mall parking.**Picture n.11****Date:** 9/02/2012**Day of the week:** Thursday**Time:** 12:30**Notes:** Inside K-Market**Picture n.12****Date:** 9/02/2012**Day of the week:** Thursday**Time:**12:45**Notes:** The Mystic River Waterfront



**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – Northeastern University Boston (MA)

**Case Study** (denomination): **Boston Marine Industrial Park**

**Researcher:** **Pasquale Pizzimenti**

## Survey Form

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# 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

## 1.1 General Information

Zoning Code	Specify the zoning map (commercial district, business district, neighborhood district, etc..) in which the initiative works <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a> Harbor District (Zoning Code – Volume II)		
Topical areas	<input checked="" type="checkbox"/> Partnership Agreement		
	<input type="checkbox"/> Community Development Corporations		
	<input type="checkbox"/> Urban Agricultural Linkages		
	<input type="checkbox"/> Social Enterprise		
	<input type="checkbox"/> University-focused		
	<input type="checkbox"/> Non-profit assistance/development		
	<input type="checkbox"/> Business incubators		
	<input type="checkbox"/> Transit Oriented Development (TOD)		
Location	Neighbourhood	<b>SOUTH BOSTON</b>	
	ZIP Code	<b>01210</b>	
	City	<b>BOSTON</b>	
	County	<b>SUFFOLK</b>	
	State	<b>MASSACHUSSETS</b>	
Start-up Source: EDIC	Year	<b>1970s</b>	
Years in operation Source: EDIC	Year	<b>35</b>	
Numbers of renewal Source: .....	Year		
Dimension Source: EDIC	Area (sq. Km)	<b>0,81 sq. Km</b>	
	Residents	<b>None</b>	
Partnership Institutional Typology	Typology		Reference by Law
	<input type="checkbox"/> BID: Business Improvement District		
	<input checked="" type="checkbox"/> PA: Public Agency (Quasi)		Massachussets General Law, Chapter 121B, section 4 in 1957 and Chapter 652, section 12 in 1960 and Chapter 121 A
	<input type="checkbox"/> CDC: Community Development Corporations		
	<input type="checkbox"/> SE: Social Enterprise		
	<input type="checkbox"/> NPOMS: Non Profit Organization for implementing the Main Street initiative		
	<input type="checkbox"/> NPCBPO: Non Profit Community-Based Planning Organization other than CDC, SE, MS		
Partnership composition Source: EDIC	Name	Public/Private/NGO	% Initial Capital Invested
	<b>BRA/EDIC</b>	<b>Public</b>	<b>\$ 55 M</b>
		<b>Private</b>	<b>\$ 170 M</b>
Number of board directors Source: EDIC	<b>5 Directors</b>		





## 1.2 Abstract of the initiative

(Source/s: Marine Industrial Park. Prepared by BRA/Engineering & Facilities MAagement Department – December 2007; [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); )

### The case study in brief (What is the case study, max 15 rows)

The Boston Marine Industrial Park is an industrial port area located near the South Boston Waterfront where are concentrated some economic initiatives of City of Boston to enhance the economic growth and job creation. Activities in the area started in 1977 when the City of Boston bought the area to realize a big industrial park to attract businesses and industries thanks the existence of facilities and infrastructures. The area is a former US Navy base. To manage it was instituted the EDIC, Economic Development Industrial Corporation. According with the Massachusetts General Laws the EDIC is a public instrumentality that within an Economic Development Area (EDA) can take land by eminent domain, issue debentures and revenue bonds, buy and sell property, collect rents, enter into contracts, receive grants, and make and receive loans. An Economic Development Area is a “blighted open area” or a “decadent area” as defined by Mass. General Laws, which is located in the municipality and is zoned for general or restricted manufacturing uses for general or waterfront industrial uses. Main objectives of the city of Boston for this area are economic development, job creation, attract new business, the revitalization of the area.

### The Challenge (Why the case worth discussing, max 5 rows)

The case study seems to be interesting for its singular characteristics. The area is only industry and commercial related. From the beginning authorities decided to locate here businesses to create new jobs for Boston. The capacity to attract new businesses is facilitated by the intertwined economic initiatives of the City of Boston. Indeed the Boston Marine Industrial Park is inside the Boston Innovation District where are other initiatives such as GreenTech Boston and Life Science.

### The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)

The area of Boston Marine Industrial Park is located in South Boston within the harbor area. The capacity to attract business is quite high despite the others city areas. After 30 years more than 3000 jobs have been created, more than 300 companies were attracted, more than \$ 300 million were invested, and the activities will go ahead. Location represents one of the more attractive factors: it is really near south station (Boston Down Town) and in front of Logan Airport. It is well infrastructured thanks to the recent initiatives operated by the City of Boston and Federal Government. In the last years were realized a new T line (Silver Line) that serves the area and link it with the airport, and the Turnpike, the road tunnel that directly link the city of Boston to the Logan Airport. The presence of the port and the already existent facilities as dock buildings, the airport and the urban and regional links make this area really attractive for businesses that want to locate their activities in a really convenient place. According with City’s objectives the strategy in the Boston Marine Industrial Park is to attract new businesses for jobs creation thanks to the economic and locational advantages that the area and the authorities can offer.

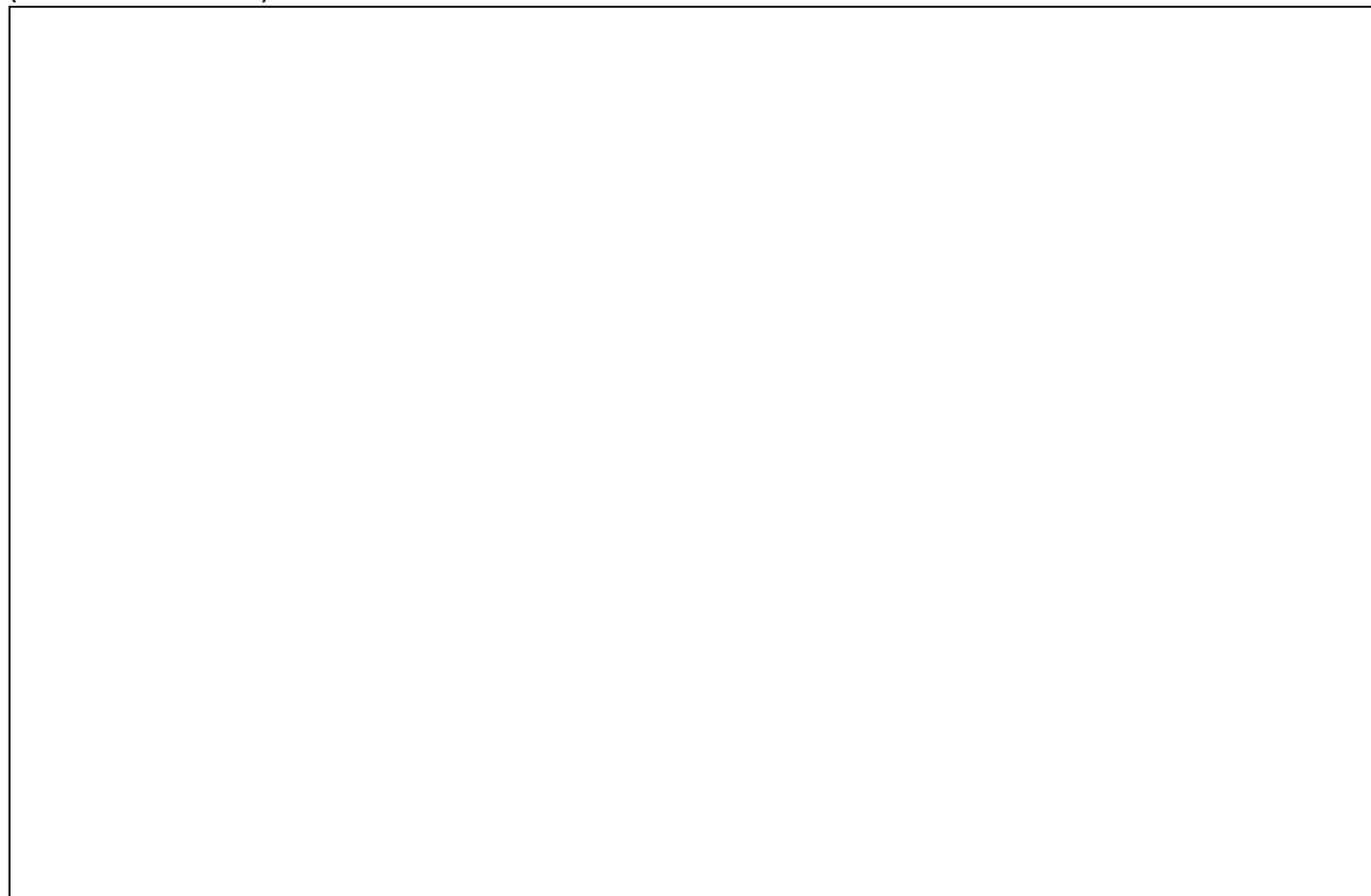
### The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)

Public (City of Boston) and private (companies, firms etc.) sectors are particularly focused on this area. For the public sector the main goal is to achieve the economic growth and the jobs creation, for the private is that to locate own business in a very competitive area with all the facilities they need. Partnership among them consists in a Lease Agreement between the EDIC and directly with the private or with an other subject that sub-rent later to another subject. There is not a common expiration date for agreements. It can vary from few years to decades. The private tenant can build own buildings in the parcel according with the city’s rules and prescriptions included in the Code Zoning and in the BMIP (Boston Marine Industrial Park) Master Plan and all the existing Laws: federal and state. During the last decade the City of Boston has decided to implement a series of initiatives aimed to the city’s economic growth. These initiatives like the Boston Innovation District, Green Tech Boston and Life Science offer a series of services for businesses. Among these, site Selection is a way to suggest what is the best location for each activity. The most suggested site is Boston Marine Industrial Park. The case study presents singular features. The area guests only

light industrial and commercial related activities.

### 1.3 Map

(Source: .....)



## 1.4 Budget size

(Source: EDIC; [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com))

Boston Marine Industrial Park area	
Expenditure	\$ 1,915,000 (2011)
Revenue	\$ 8,750,000 (2011)
Total Budget	\$ 8,750,000 (2011)

EDIC General	2010	2009	2008
Expenditure	\$ 36,166,000	\$ 37,126,143	\$ 34,475,878
Revenue	\$ 36,274,000	\$ 32,828,579	\$ 32,203,862
Total Budget	\$ 36,166,000	\$ 37,126,143	\$ 34,475,878

## 1.5 Vacancy rate

(Source: provided by EDIC offices)

Vacancy	%	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm)	<b>20% sqm (2012)</b>	-	-
Vacant housing property (sqm)	<b>None</b>	-	-
Vacant land (sqm)	<b>20% sqm (2012)</b>	-	-

## 1.6 Strategic Priorities

(Source: provided by EDIC offices; [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); [www.cityofboston.gov](http://www.cityofboston.gov); [www.innovationdistrct.org](http://www.innovationdistrct.org); [www.greentechboston.org](http://www.greentechboston.org); Marine Industrial Park. Prepared by BRA/Engineering & Facilities MAagement Department – December 2007)

Priorities	Description
<input type="checkbox"/> Retail Enhancement	
<input checked="" type="checkbox"/> Economic Revitalization	<b>The area is interested by several City of Boston economic initiatives: Boston Innovation District, Green Tech Boston, Life Science. The main aim of all these initiatives is to enhance the economic structure of the city and to facilitate economic growth.</b>
<input type="checkbox"/> Security and Safety	
<input type="checkbox"/> Building Restoration/Renewal	
<input checked="" type="checkbox"/> Innovation/Green Technologies	<b>Life Science and Green Tech initiative suggest to businesses to locate their offices and their light industrial activity in the BMIP area.</b>
<input checked="" type="checkbox"/> Education and Training	<b>Professional Training is part of the different initiatives services mentioned above.</b>
<input checked="" type="checkbox"/> Job Creation/Social works	<b>Job creation is a priority of City of Boston. Within the park are employed about 3000 people. Job creation is supported by the EDIC through the Neighbourhood Job Trust (NJT)</b>

<input checked="" type="checkbox"/> Technology Transfer	<b>Many start-up are located in the park attracted by the Boston Innovation District initiative</b>
<input type="checkbox"/> Capacity Building	
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	
<input type="checkbox"/> Local produce valorisation	
<input type="checkbox"/> Cultural enrichment	
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	

### 1.7 Private sector involvement

(Source: provided by EDIC offices)

All Business enterprises are associated:	<input type="checkbox"/>	if not indicate the % <b>50-60</b>
All merchants are associated :	<input type="checkbox"/>	if not indicate the % _____
Other private entities (no profit)	<input type="checkbox"/>	if not indicate the % _____

### 1.8 Public investment programs

(Source: [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); Marine Industrial Park. Prepared by BRA/Engineering & Facilities MAmanagement Department – December 2007)

Policy focus for public investment program	Description
Tax policy focus	The BIDFA (EDIC affiliate) applies Tax-Exempt Industrial Bonds (IDB's) Tax-exempt industrial development bonds (IDB's) are issued to acquire land and construct new facilities, expand/renovate existing facilities or purchase new equipment. These bonds are subject to the statewide volume cap. Projects eligible for tax-exempt financing are manufacturing facilities that create tangible products, cogeneration or small power facilities for the local furnishing of energy or gas and solid waste/resource recovery facilities. These projects often have a strong job creation/retention component
Fiscal policy focus	
Economic development organizations	The EDIC is an Economic Development organization
University focus	
Recruitment	
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	The BLDC (EDIC affiliate) provides loans of up to \$150,000 for businesses in, or relocating to, the City of Boston.



	These loans can be used when buying a new business property, purchasing equipment and machinery, constructing an addition to an existing plant, making leasehold improvements or providing working capital to grow your business.
Credit Access	The BLDC (EDIC affiliate) actively pursues loan participations with local banks. By providing subordinated debt, the BLDC helps small businesses and Boston's banking community come together
Local Welfare Policy	
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	Reg Code, Municipal Harbor Plan, BMIP Master Plan.



## **2 II SECTION: SOCIOECONOMIC STRUCTURE**

### **2.1 Demographic and housing characteristics**

### **2.2 Labor Market**

### **2.3 Overall socioeconomic data**



### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditures

(Source: provided by EDIC offices, [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com) )

Items (BMIP area)	Year	Expenditure (\$)		Total
		Public	Private	
General & administrative	2011	1,310,000		1,310,000
Social services	2011	0		0
Capital improvements	2011	0		0
Streetscape/ sidewalk maintenance and repair	2011	241,500		241,500
Graffiti removal	2011	0		0
Beautification & Horticulture	2011	2,000		2,000
Holiday lighting	2011	0		0
Sanitation	2011	10,000		10,000
Security	2011	350,000		350,000
Marketing, communication special events and tourism	2011	1,500		1,500
Education	-			
Job creation initiative	-			
Resident initiative	-			
Other	-			

Items (General Expenditure EDIC) <b>EDIC ITEMS DON'T MATCH WITH AREA ITEMS</b>	Year	Expenditure (\$)		Total
		Public	Private	
<u>General &amp; administrative</u>	2010	\$ 905,000		\$ 905,000
<u>Social services (CBO'S &amp; JOBS &amp; COMMUNITY SERVICES)</u>	2010	\$ 15,773,000		\$ 15,773,000
Capital improvements	-	-	-	-
Streetscape/ sidewalk maintenance and repair	-	-	-	-
Graffiti removal	-	-	-	-
Beautification & Horticulture	-	-	-	-
Holiday lighting	-	-	-	-
Sanitation	-	-	-	-
Security	-	-	-	-
Marketing, communication special events and tourism	-	-	-	-
Education	-	-	-	-
Job creation initiative	-	-	-	-
Resident initiative	-	-	-	-
<u>PROPERTY MANAGEMENT</u>	2010	\$ 5,797,000	-	\$ 5,797,000
<u>EMPLOYMENT BENEFITS</u>	2010	\$ 3,352,000	-	\$ 3,352,000
<u>CONTRACTUAL SERVICES</u>	2010	\$ 1,463,000	-	\$ 1,463,000
<u>PERSONNEL</u>	2010	\$ 8,877,000	-	\$ 8,877,000
Other	-	-	-	-



### 3.2 Source of revenue (in BMIP area)

(Source: provided by EDIC offices)

Items	Year	revenue (\$)
Program service revenue		
Special contracts		
Investment income		
Fundraising & special events		
Government Grants		
Private contributions		
Interest		
Assessment (fee or levy)		
Rental income	<b>2011</b>	<b>\$ 8,750,000</b>
Other		

Items ( General Revenues EDIC) <b><u>EDIC ITEMS DON'T MATCH WITH AREA ITEMS</u></b>	Year	revenue (\$)
Program service revenue	-	-
Special contracts	-	-
Investment income	-	-
Fundraising & special events	-	-
Government Grants	<b>2010</b>	<b>\$ 20,994,000</b>
Private contributions	-	-
Interest	<b>2010</b>	<b>\$ 133,000</b>
Assessment (fee or levy)	-	-
Rental income	<b>2010</b>	<b>\$ 13,926,000</b>
<b><u>EQUITY PARTECIPATION</u></b>	<b><u>2010</u></b>	<b><u>\$ 820,000</u></b>
Other	<b>2010</b>	<b>\$ 400,000</b>

## 4 IV SECTION: MARKETING AND PROMOTION

### 4.1 Business attraction, creation, retention and assistance programs

(Source: provided by EDIC offices; [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); Marine Industrial Park. Prepared by BRA/Engineering & Facilities Management Department – December 2007)

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	<b>Innovation District brand and BMIP advantages</b>	<b>219</b>	City Initiatives	
Creation of new business (start-ups)	Green and New Tech; Life Science	not available	City Initiatives	
Retention of business	-	-	-	-
Assistance weak business	-	-	-	-

### 4.2 Services and improvements

(Source: : [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); Marine Industrial Park. Prepared by BRA/Engineering & Facilities Management Department – December 2007)

Programs	Description	Item	Financial sources	
			Public	Private
<input checked="" type="checkbox"/> Retail Enhancement	<b>BLDC (EDIC Affiliate) administers several Loan Programs</b>	<b>SBA 504 (fixed-asset financing); Revolving Loan Fund (fixed-asset financing using CDBG of Boston); Economic Development Administration Grant Money</b>	<b>Loans between \$ 500,000 and \$ 700,000</b>	
<input checked="" type="checkbox"/> Economic Revitalization	<b>City of Boston economic initiatives</b>	<b>Boston Innovation District; GreenTech Boston; Life Science</b>	<b>X</b>	
<input type="checkbox"/> Security and Safety				
<input type="checkbox"/> Building Restoration/Renewal				
<input checked="" type="checkbox"/> Innovation/Green Technologies	<b>GreenTech Boston; Life Science</b>	<b>Provide services for business</b>		
<input checked="" type="checkbox"/> Education and Training	<b>NJT (EDIC Affiliate): job training programs</b>	<b>Job Contribution Grants; Development Impact Projects</b>	<b>X</b>	
<input checked="" type="checkbox"/> Job Creation/Social works	<b>BEC (EDIC Affiliate) enforces Boston Residents</b>		<b>X</b>	

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.



# MARIE CURIE IRSES - CLUDs PROJECT



	Job Policy			
<input checked="" type="checkbox"/> Technology Transfer	<b>GreenTech Boston; Life Science</b>	<b>Provide services for business</b>		
<input type="checkbox"/> Capacity Building	-	-	-	-
<input type="checkbox"/> Local services/provisions (housing, leisure, etc.)	-	-	-	-
<input type="checkbox"/> Local produce valorisation	-	-	-	-
<input type="checkbox"/> Cultural enrichment	-	-	-	-
<input type="checkbox"/> ...Natural Beauty, Green Space and biodiversity	-	-	-	-

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations

(Source: : [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com); Marine Industrial Park. Prepared by BRA/Engineering & Facilities Management Department – December 2007)

Name	Typology (size)	Level of influence (with respect the size of the organization)
<b>EDIC*</b>	<b>Economic Development Corporation</b>	<b>High</b>
<b>BIDFA (Affiliate)</b>	<b>Boston Industrial Development Financing Authority</b>	<b>Medium</b>
<b>BLDC (Affiliate)</b>	<b>Boston Local Development Corporation</b>	<b>Medium</b>
<b>BEC (Affiliate)</b>	<b>Boston Employment Commission</b>	<b>Medium</b>
<b>NJT (Affiliate)</b>	<b>Neighborhood Job Trust</b>	<b>Medium</b>

\* they are affiliates. No affiliates?

### 5.2 Local elected official and community board members (Representatives)

(Source: interview with EDIC officer)

Name	Elected/member	Political role
<b>Mayor</b>	<b>Elected</b>	<b>Board Directors</b>
<b>City Council</b>	<b>Elected</b>	<b>Board Directors</b>
<b>BRA/EDIC</b>	<b>Member</b>	<b>Board Directors</b>

### 5.3 Owners/tenants (To distinguish in the report)

(Source: interview with EDIC officer)

Typology	Number
Commercial property owners	<b>No</b>
Industrial property owners	<b>EDIC (1)</b>
Commercial Tenants	<b>No</b>
Resident owners	<b>No</b>
Community organizations	<b>No</b>

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

(Source: provided by EDIC offices)

Typology	Average 2000		Average 2000		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Housing	-	-			-	-	-	-
Commerce (retail)	-	-	169.946,12	\$ 91,46/\$ 118,36 (rent)	-	-	-	-
Industry	-	-	213,154,69	\$ 91,46/\$ 118,36 (rent)	-	-	-	-
Advanced services sector	-	-	140.245,49	\$ 91,46/\$ 118,36 (rent)	-	-	-	-
Parking	-	-	40,046,32	-	-	-	40,046,32	-

### 6.2 Average Market Value

(Source: <http://www.cityofboston.gov/assessing/search/?parcel=0602731006&streetnumber=&streetname=&unitnumber=&owner=>)

Typology	Before the initiative (Year)	After the initiative (Year)	During the initiative
Housing (1 to 3 family residential)	-	-	-
Housing (4 to 6 family residential)	-	-	-
Housing (7 or more residential, condominium)	-	-	-
Commerce	-	-	
Industry	-	-	\$ 242(ca) sqm
Advanced services sector	-	-	\$ 624 sqm
Parking	-	-	-

### 6.3 Commerce and advanced services sectors

(Source: .....)

Typology	Average		Renovated Buildings		New Buildings	
	sqm	\$/ sqm	sqm	\$/ sqm	sqm	\$/ sqm
Mall	-	-	-	-	-	-
Farmer market	-	-	-	-	-	-



## MARIE CURIE IRSES - CLUDs PROJECT



Small retail	-	-	-	-	-	-
Handcrafts	-	-	-	-	-	-
Business financial	-	-	-	-	-	-
Administration buildings	-	-	-	-	-	-
Insurance	-	-	-	-	-	-
Restaurants	-	-	-	-	-	-
B&B	-	-	-	-	-	-
Hotel	-	-	-	-	-	-
Cinema	-	-	-	-	-	-
Museum	-	-	-	-	-	-
Theatres	-	-	-	-	-	-
Universities / campus	-	-	-	-	-	-

### 6.4 Community facilities

(Source: [www.mbta.com](http://www.mbta.com))

Typology	Total (sqm or number)		Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after project (sqm or number)
	private	public	Private	public	private	public	
Schools	-	-					
Public libraries	-	-					
Post office	-	-					
Hospital	-	-					
Safety Security	-	-					
Job center	-	-					
Public park		2					
Train Station	-	-					
Bus station (T Station – Silver Line)	-	8					8 (During the project)
Bike - Car sharing service	-	-					
Housing	-	-					

### 6.5 Accessibility

(Source: [maps.google.it](https://maps.google.it))

Distance from Downtown	Time	Km
By subway	25 minutes	2,5 Km
By bus	-	-
By car	7 minutes	2,5 Km
By rail	-	-

### 6.6 Supply chain: the supply of local products

(Source: : [www.bostonredevelopmentauthority.com](http://www.bostonredevelopmentauthority.com);) )



Products	Supplier (origin)	Distance from the area
Foods (Seafood)	BMIP	Inside the area
Handcrafts	-	-
Others	-	-

## 6.7 Environmental data

(Source: <http://www.usgbc.org/DisplayPage.aspx?CategoryId=19>)

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	-	-	-
Ratio of green space to urban form	-	-	-
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	-	-	-
% use of space over 24 hours	-	-	-
Density level per square metre of scheme	-	-	-
% of recycled material used in the built environment	-	-	-
% of non-renewable resources consumed in current scheme	-	-	-
LEEDs, green building initiatives undertook ( <a href="http://www.usgbc.org">www.usgbc.org</a> )	0	2	100%
Energy efficiency measures undertook	-	-	-
Other environmental indicators specifically applied to the initiative	-	-	-

## 6.8 Social data

(Source: <http://www.cityofboston.gov/police/stats/>)

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	-	-	2004-2008 = -13% 2007-2008 = -11%
Social service personnel per 1,000 population	No Social Service personnel inside the area	-	-
Occupancy levels in residential area (voids and vacant properties)	No Residential Area inside the BMIP	-	-
% of hospital recovery	No Hospital Recovery inside the BMIP	-	-
Other social indicators specifically applied to the initiative	-	-	-

## 6.9 Geographical information (GIS based)

(Source: .....)

Layer	Description
Land use map	www.mass.gov
Zoning map	www.mass.gov
Community facilities	www.mass.gov
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	www.mass.gov
Pedestrian routes and amenities	www.mass.gov
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	www.mass.gov
Green spaces	www.mass.gov
Connectivity grid	Desk analysis



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.



**Picture n. 1**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:14**  
**Notes: Bank of America Pavillion**



**Picture n.2**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:18**  
**Notes Seafood companies**



**Picture n.3**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:20**  
**Notes T Station**



Picture n.4  
Date 9/2/2012  
Day of the week Thursday  
Time 14:22  
Notes Harpoon Brewery



Picture n.5  
Date 9/2/2012  
Day of the week Thursday  
Time 14:24  
Notes Seafood Companies



Picture n.6  
Date 9/2/2012  
Day of the week Thursday  
Time 14:30  
Notes Boston Ship Repair



**Picture n.7**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:35**  
**Notes Dry Dock**



**Picture n.8**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:45**  
**Notes Small park linked with the Harbor Walk project**



**Picture n.9**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:46**  
**Notes Building that will be renewed with private investments in the next yers**



**Picture n.10**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:48**  
**Notes Logistic companies**



**Picture n.11**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 14:50**  
**Notes Harbor Walk and Dry Dock**



**Picture n.12**  
**Date 9/2/2012**  
**Day of the week Thursday**  
**Time 15:00**  
**Notes Boston Design Center (Marine Industrial Park)**  
**and Cruise Falcon Terminal (Massport Authority)**





**WP1:** Urban Management Instruments – Private Public Partnership (PPP) Evaluation Performance

**Lead Partner:** Department of Economics – *Northeastern University* of Boston (MA)

**Case Study:** *WASHINGTON GATEWAY MAIN STREET*

**Researcher:** Enrica Polizzi di Sorrentino

## Survey Form

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## 1 I SECTION: OVERALL OUTLINE OF THE INITIATIVE

### 1.1 General Information

<b>Zoning Code</b> <i>Source:</i> <a href="http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp">http://www.bostonredevelopmentauthority.org/Zoning/ZoningMaps.asp</a>	Proper Boston (map 1), South End Neighborhood District (map 1P)	
<b>Topical areas</b>	<input type="checkbox"/> Partnership agreement <input type="checkbox"/> Community Development <input type="checkbox"/> Urban Agricultural Linkages <input type="checkbox"/> Social Enterprise <input type="checkbox"/> University-focused <input checked="" type="checkbox"/> Non-profit assistance/development <input type="checkbox"/> Business incubators	
<b>Location</b>	<i>Neighbourhood</i> <i>ZIP Code</i> <i>City</i> <i>County</i> <i>State</i>	South End – Lower Roxbury 02118 Boston Suffolk Massachusetts
<b>Start-up</b> <i>Source: Interview form</i>	<i>Year</i>	1997
<b>Years in operation</b>	<i>Year</i>	15
<b>Number of renewals</b> <i>Source:</i>		
<b>Dimension</b> <i>Source: U.S. Census Bureau</i>	<i>Area (sq. Km)*</i>  <i>Residents</i>	Project: 0,4 sq. km Census Tracts: 3,84 sq. Km  23.202 inh.
<b>Partnership Institutional Typology</b> <i>Source:</i>	<i>Typology</i> <input type="checkbox"/> BID: Business Improvement District <input type="checkbox"/> PA: Public Agency <input type="checkbox"/> CDC: Community Development Corporations <input type="checkbox"/> SE: Social Enterprise <input checked="" type="checkbox"/> NPOMS: Non profit organization for implementing the Main Street initiative <input type="checkbox"/> NPCBPO: Non profit Community-Based Planning Organization other than CDC, SE, MS	<i>Reference by law</i>     501 (c) (3)



	<input type="checkbox"/> TOD <input type="checkbox"/> OTHER		
<b>Partnership composition</b> <i>Source:</i>	<i>Name</i> Washington Gateway Main Street, Inc.	<i>Public/Private/NGO</i> Non profit organization	<i>% Initial Capital Invested</i>
<b>Number of board directors</b> <i>Source: Washington Gateway Main Street website</i>	12		

\* This datum is calculated both for the actual area of the project and for the area of the census tracts on which the project insists, which is relevant for its correspondance with population, also calculated on census tract base

## 1.2 Abstract of the initiative

Sources: : Washington Gateway Main Street website, Interview form,

*The case study in brief (What is the case study, max 15 rows)*

Washington Street has historically been the only land entrance to the city of Boston, the commercial route connecting peninsular Boston to the mainland. Although it was subject to many urban renewals especially in the 60's and 70's, acres of land remained vacant and many of the historic buildings were ruined. In 1995 Mayor Menino appointed a 28-member Task Force, which together with residents developed an Action Plan for the street's revitalization with two main purposes. First of all, the creation of a neighborhood shopping district, accessible through public transportation and well integrated in its historical fabric. Secondly, the increase in middle-income housing but, at the same time, the retention of the neighborhood' social and economic diversity against gentrification phenomena. In 1997 Washington Gateway was officially designated as a Main Street (Washington Gateway Main Street Inc.) and began implementing the Task Force's Action Plan using the ready-made model of the National Trust's Four Point Approach and the Boston Main Streets Program's funding. The street's physical transformation began in 2002 together with the replacement of the old Orange Line: brick sidewalks, granite curbing and crosswalks, lighting, and sheltered canopies were built and the new Silver Line Bus Rapid Transit was put in place. To prevent the displacement of current communities often associated with gentrification, the city focused on housing opportunities for a range of family household incomes. Investments began to flow in the area and remarkable number of new shops opened, making the corridor a destination for local services, home furnishings, art, and dining. Many historic buildings were renewed, such as the Historic Federal-era and Victorian structures that were listed and designated on the National Register of Historic Places, intermixed with contemporary loft developments.

*The Challenge (Why the case worth discussing, max 5 rows)*

In 1987 the Elevated Railway structure was dismantled and the strategic position of the area called for the opening of new development opportunities. The delay in the installation of the Transit Replacement Service and the street reconstruction had a chilling effect on reinvestment activity. The real challenge was to convince property owners and prospective developers to invest in the area but at the same time, to maintain the historical identity of the



neighborhood through a continuous and active involvement of the community.

*The Context (Salient points about the environment and the circumstances affecting the issues at hand, max 10 rows)*

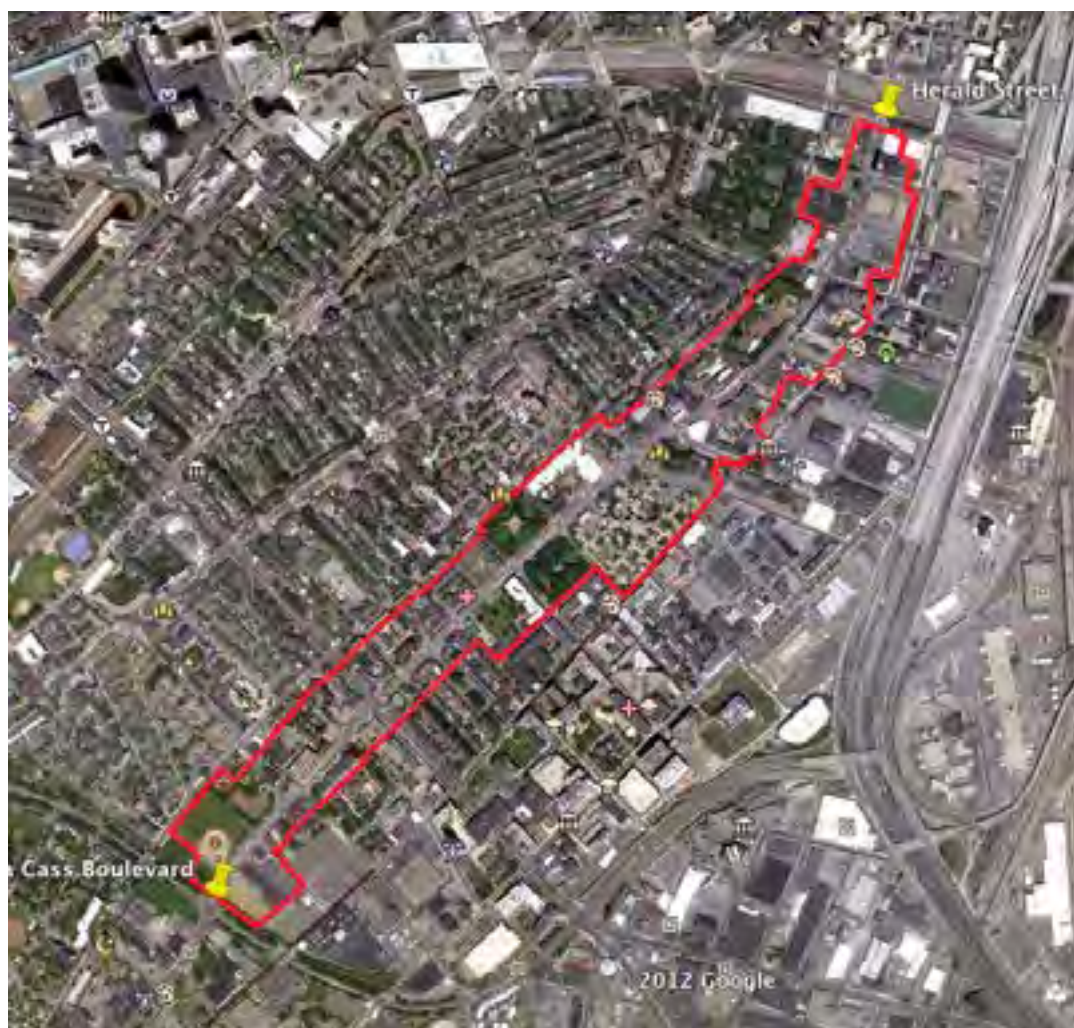
Being Washinton Street the geographical “Neck” of Boston, it became a center of culture and commerce for the whole surrounding area. Theaters hosted musicals, comedies and vaudeville and all kind of restaurants were opened to serve the burgeoning middle class, including business owners, bankers and industrialists. Washington Street became a wealthy residential district made of stately row houses — most built in the mid-1800s — and Victorian parks. As immigrant families found their way to Back Bay and Roxbury, many white families moved away and the South End became a tenement district with a high percentage of landlordism absentee. Washington Street's theaters were converted to movie houses and apartments became rooming houses. Entire families moved away and between 1950 and 1970 the whole area lost two-third of its population, giving space to suburbanization, prostitution and drug. In the 1960's the neighborhood was considered one of the poorest of the city.

*The Strategy (Brief description of the approach adopted to address the challenges, max 10 rows)*

The Washington Street Task Force adopted a participatory planning approach and together with the Boston Redevelopment Authority and the community began to work on new zoning and design guidelines. Mixed-use zoning was adopted in order to maintain the commercial historic spine and the housing identity of the neighborhood. Starting from the Silver Line Transite Replacement Service project, a citizens oversight committee was appointed to guide decisions about the design and reconstruction of Washington Street. The City of Boston attended the effort of improving the parks and public open spaces along Washington Street, together with improving and maintaining some city-owned properties and redeveloping vacant or underutilized land and building. Opportunities for new jobs and businesses were created, also encouraging local banks to implement small business lending initiatives, promoting technical assistance and business loans. The architectural, social and cultural history of the area was re-emphasize through a new marketing strategy, encouraging art-related businesses and restaurants and the creation of a district-wide business association to promote and lobby for businesses in the whole South End and Lower Roxbury.

### 1.3 Map

Source: own elaboration from Google Earth Pro



## 1.4 Budget size

Source: IRS

	2003	2004	2005	2006	2007	2008	2009	2010
Expenditure	149.249	150.810	n.a.	157.446	59.984	91.773	91.375	76.076
Revenue	147.886	159.527	n.a.	133.113	62.628	109.319	95.772	84.117
Total Budget	10.631	19.348	n.a.	7.307	9.951	27.497	31.894	39.935
Of which: Asset	11.994	10.631	n.a.	31.640	7.307	9.951	27.497	31.894

## 1.5 Vacancy rate

Source: U.S. Census Bureau

Vacancy	% 2000	% 2010	Percentage of change from previous year	Percentage of change from the starting point
Vacant commercial property (sqm or units)	n.a.	n.a.	n.a.	n.a.

Vacant housing property (sqm or units)	7%	4%		-3%
Vacant land (sqm or units)	28.328 sqm			

## 1.6 Strategic Priorities

Source: Interview form

Priorities	Description
<input checked="" type="checkbox"/> Retail Enhancement	Storefront improvements; promotion and marketing of events
<input checked="" type="checkbox"/> Economic Revitalization	Promotion of business loans and technical assistance; creation of business association; new zoning for Neighborhood Development Area (NDA)
<input checked="" type="checkbox"/> Security and Safety	Collaboration with the Boston Police Department
<input checked="" type="checkbox"/> Building Restoration/Renewal	Design of a new streetscape, including visual improvements and mix of residential, commercial and recreational use;
<input type="checkbox"/> Innovation/Green Technologies	
<input type="checkbox"/> Education and Training	
<input type="checkbox"/> Job Creation/Social works	
<input type="checkbox"/> Technology Transfer	
<input type="checkbox"/> Capacity Building	
<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	Creation of parking garages for commercial expansion; provision of affordable housing;
<input type="checkbox"/> Local produce valorisation	
<input checked="" type="checkbox"/> Cultural enrichment	Art business encouragement;
<input checked="" type="checkbox"/> Natural Beauty, Green Space and biodiversity	Improvement and beautification of parks and public open spaces

## 1.7 Private sector involvement

Source: Interview form

- All Business enterprises are associated: ☐ if not indicate the % 0
- All merchants are associated: ☐ if not indicate the % 0
- Other private entities (non profit) ☐ if not indicate the % 0

## 1.8 Public investment programs

Source: Interview form

Policy focus for public investment program	Description
--	-------------

Tax policy focus	Federal Tax Exempt
Fiscal policy focus	
Economic development organizations	
University focus	
Recruitment	
Business Aid (Start-up, Spill Over, funding, copyright, etc.)	Business training, funding, technical assistance
Credit Access	
Local Welfare Policy	Affordable housing
Urban Planning Policy (property rights, land use change, zoning, TDR, preservation, etc.)	Zoning (NDA); redevelopment of vacant land and buildings, historic building preservation

## 2 II SECTION: SOCIOECONOMIC STRUCTURE

*Please, refer to Annex 1*

### 2.1 Demographic data

### 2.2 Labour Market

### 2.3 Production

### 3 III SECTION: FISCAL ANALYSIS SUMMARY

#### 3.1 Items of expenditure

Source: IRS 990 FORMS 2003 and 2010

Items	Expenditure (\$)		Total (2003)	Total (2010)
	Public	Private		
General & administrative			11.547	65.579
Social services				
Capital improvements				
Streetscape/sidewalk maintenance and repair				
Graffiti removal				
Beautification & Horticulture			13.925 (included in program services)	
Holiday lighting				
Sanitation				
Security				
Marketing, communication special events and tourism				
Education				
Job creation initiative				
Resident initiative				
Other:				
Programme services			131.094	8.705
of which: storefront improvements			25.000	
of which: Marketing, communication special events and tourism			4.576	1.792
Fundraising			6.608	
<i>Total</i>			149.249	76.076

#### 3.2 Source of revenue

Source: : IRS 990 FORMS 2003 and 2010

Items	revenue (\$)		Total (2003)	Total (2010)
	Public	Private		
Program service revenue				25.730
Special contracts				
Investment income				54
Fundraising & special events				
Government Grants			147.886	58.333
Private contributions (auto-taxation)	15.016			
Interest				
Assessment (fee or levy)				
Rental income				

Other				
<i>Total</i>			147.886	84.117

#### 4 IV SECTION: MARKETING AND PROMOTION

##### 4.1 Business attraction, creation, retention and assistance programs

Source: Washington Gateway Main Street Statistical Summary 2000-2010

Program	Description	Number	Financial sources <sup>1</sup>	
			Public	Private
Attraction of business new to the area	Net new businesses	61	n.a.	n.a.
Creation of new business (start-ups)				
Retention of business	n.a.	n.a.	n.a.	n.a.
Assistance weak business	n.a.	n.a.	n.a.	n.a.

##### 4.2 Services and improvements

Source: Washington Gateway Main Street Statistical Summary 2000-2010

Programs	Description	Item	Financial sources		
			Public	Private	Total
<input checked="" type="checkbox"/> Retail Enhancement	Business investment				\$ 13.2 million
	New business space	159.850 sf			
	Net new jobs	582			
<input type="checkbox"/> Economic Revitalization					
<input checked="" type="checkbox"/> Security and Safety	Collaboration with police department and creation of a new police station				
<input checked="" type="checkbox"/> Building Restoration/Renewal	Storefront improvement	50			
<input type="checkbox"/> Innovation/Green Technologies					
<input type="checkbox"/> Education and Training					
<input checked="" type="checkbox"/> Job Creation/Social works	Volunteer work	22.600 hours			
<input type="checkbox"/> Technology Transfer					
<input type="checkbox"/> Capacity Building					

<sup>1</sup> E.g. Federal, State, County or City Programs, CDC, Private Corporations, Social Enterprises, Private University, Private Investments Found, Foundations, etc.



<input checked="" type="checkbox"/> Local services/provisions (housing, leisure, etc.)	Partecipation and encouragement of affordable housing.	1,056			
	Creation of parking spaces	1.100			
<input type="checkbox"/> Local produce valorisation					
<input type="checkbox"/> Cultural enrichment					
Natural Beauty,	Open space improvements				\$ 2,8 millions
<input checked="" type="checkbox"/> Green Space and biodiversity					
<input type="checkbox"/> Other					

## 5 V SECTION: STAKEHOLDERS AND GOVERNANCE

### 5.1 Local development organizations (not partners)

Source: Washington Gateway Task Force Report

Name	Typology (size)	Level of influence (with respect to the size of the organization)
Religious leaders (Cathedral of Holy Cross and Roman Catholic Archdiocese of Boston)	Religious	Medium
Artist community	Arts	Low
Bank representatives	Bank	Low
Boston Society of Architects/ Harvard Graduate School of Design	Architecture society/university students	Medium
Tremont Business Association	Business association	High

### 5.2 Local elected official and community board members

"Regarding Main Streets, the distinction "elected/members" is irrelevant because the Board of Directors are formed by members representing the neighborhood's community and elected by the community itself. Even if they may be ex-officio members, in their political role they act substantially as facilitators but without any formal involvement of the agencies they work for."

Source: Washington Gateway Main Street website

Name	Elected/member	Political role
Guy D. Busa Jr.	President of the Board	Civil engineer at Howard/Stein-Hudson Associates (HSH)
Marc LaCasse	Board Vice Chairperson	Partner at The McCormack Firm
Edward D. Bean	Board of Directors	Business owner
Kate Moran Carter	Board of Directors	Associate with the law firm of Robinson & Cole LLP
Stephen Chan	Board of Directors	Advisor to the Mayor for the City of Boston
Michael E. Colby	Board of Directors	Policy Director at the Boston Redevelopment Authority (BRA)
Bud Larievy	Board of Directors	Interim Senior Program Director of Boards of Directors of Boston Agencies
Dimitry Neyshadt	Board of Directors	Financial Advisor at Strategic Financial Partners
Craig Nicholson	Board of Directors	Director of Sustainable Development at Ajax Partners and US Green Building Council LEED Accredited Professional

Carla J. Richards	Board of Directors	<i>Director of Community Relations at Boston University Medical Center</i>
Michael Semizoglou	Board of Directors	<i>Commercial Lender for Framingham Co-operative Bank</i>

### 5.3 Owners/tenants

Source:

Typology	Number
Commercial property owners	-
Industrial property owners	-
Commercial Tenants	-
Resident owners	-
Community organizations	-

## 6 VI SECTION: SPATIAL DATA

### 6.1 Real Estate

Source: City of Boston website

Typology	Average 2000		Average 2010		Renovated Buildings		New Buildings	
	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>	<i>sqm</i>	<i>\$/sqm</i>
Housing 1 family residential	149,4	2216	149,4	4977	N.A.	N.A.	N.A.	N.A.
Housing 2 family residential	263,7	1370	263,7	4415	N.A.	N.A.	N.A.	N.A.
Housing 3 family residential	342,7	1065	342,7	2984	N.A.	N.A.	N.A.	N.A.
Housing (4 to 6 family residential)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Housing (7 or more family residential, condominium)	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Commerce	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Industry	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Advanced services sector	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
Parking	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

### 6.2 Average Market Value

Source: City of Boston website

Typology	Before the initiative (Year)	After the initiative (Year)
Housing 1 family residential	\$ 2216/sqm	\$ 4977/sqm
Housing 2 family residential	\$ 1370/sqm	\$ 4415/sqm
Housing 3 family residential	\$ 1065/sqm	\$ 2984/sqm
Housing (4 to 6 family residential)	N.A	N.A
Housing (7 or more family residential, condominium)	N.A	N.A
Commerce	N.A	N.A
Industry	N.A	N.A

### 6.3 Commerce and advanced services sectors

Source: own elaboration from Google Maps

Typology	Units	Renovated Buildings		New Buildings	
		sqm	sqm	sqm	sqm
Mall	1	N.A.	N.A.	N.A.	N.A.
Farmer market	1	N.A.	N.A.	N.A.	N.A.
Small retail	20	N.A.	N.A.	N.A.	N.A.
Handcrafts	n.a.	N.A.	N.A.	N.A.	N.A.
Business financial	10	N.A.	N.A.	N.A.	N.A.
Administration buildings	0	N.A.	N.A.	N.A.	N.A.
Insurance	3	N.A.	N.A.	N.A.	N.A.
Restaurants	23 c.a.	N.A.	N.A.	N.A.	N.A.
B&B	1	N.A.	N.A.	N.A.	N.A.
Hotel	2	N.A.	N.A.	N.A.	N.A.
Cinema	0	N.A.	N.A.	N.A.	N.A.
Museum/art galleries	6	N.A.	N.A.	N.A.	N.A.
Theatres	0	N.A.	N.A.	N.A.	N.A.
Universities / campus	2	N.A.	N.A.	N.A.	N.A.

### 6.4 Community facilities

Source: own elaboration from Google Maps

Typology	Units	Renovated Buildings (sqm or number)		New Buildings (sqm or number)		Increase after district (sqm or number)
		Private	public	private	public	
Schools	5	N.A.	N.A.	N.A.	N.A.	N.A.
Public libraries	0	N.A.	N.A.	N.A.	N.A.	N.A.
Post office	0	N.A.	N.A.	N.A.	N.A.	N.A.
Hospital/medical center	1	N.A.	N.A.	N.A.	N.A.	N.A.
Safety Security	1	N.A.	N.A.	N.A.	N.A.	N.A.
Job center	0	N.A.	N.A.	N.A.	N.A.	N.A.
Public park/recreation	4	N.A.	N.A.	N.A.	N.A.	N.A.
Train Station	0	N.A.	N.A.	N.A.	N.A.	N.A.
Bus station	0	N.A.	N.A.	N.A.	N.A.	N.A.
Bike car sharing service	0	N.A.	N.A.	N.A.	N.A.	N.A.
Housing	5	N.A.	N.A.	N.A.	N.A.	N.A.

### 6.5 Accessibility

Source: MBTA

Distance from Central Boston	Average Time	Average Km
By subway	11 min.	3,2
By bus		3,2
By car	8 min.	3,2
By rail	n.a.	n.a.

## 6.6 Supply chain: supply of local products

Products	Supplier (origin)	Distance from the area
Foods	N.A.	N.A.
Handcrafts	N.A.	N.A.
Others	N.A.	N.A.

## 6.7 Environmental data

Indicator	Before the project	After the project	Percentage point change from the beginning
CO2 emission per square meter	N.A.	N.A.	N.A.
Ratio of green space to built-up area	N.A.	N.A.	N.A.
Ratio of brownfield land (previously occupied by development) to green field land consumed by the scheme	N.A.	N.A.	N.A.
% use of space over 24 hours	N.A.	N.A.	N.A.
Density level per square metre of scheme	N.A.	N.A.	N.A.
% of recycled material used in the built environment	N.A.	N.A.	N.A.
% of non-renewable resources consumed in current scheme	N.A.	N.A.	N.A.
LEEDs, green building initiatives undertaken ( <a href="http://www.usgbc.org">www.usgbc.org</a> )	N.A.	N.A.	N.A.
Energy efficiency measures undertaken	N.A.	N.A.	N.A.
Other environmental indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.8 Social data

Indicator	Before the project	After the project	Percentage point change from the beginning
Crime rate	N.A.	N.A.	N.A.
Social service personnel per 1,000	N.A.	N.A.	N.A.

population			
Occupancy levels in residential area (voids and vacant properties)	N.A.	N.A.	N.A.
% of hospital recovery	N.A.	N.A.	N.A.
Other social indicators specifically applied to the initiative	N.A.	N.A.	N.A.

## 6.9 Geographical information (GIS based)

Source

Layer	Description
Land use map	<a href="http://www.mass.gov">www.mass.gov</a>
Zoning map	<a href="http://www.mass.gov">www.mass.gov</a>
Community facilities	<a href="http://www.mass.gov">www.mass.gov</a>
Cultural facilities (Theatres, cinemas, art centres)	Field work/ desk analysis
Heritage	Field work/ desk analysis
Bicycle ways	<a href="http://www.mass.gov">www.mass.gov</a>
Pedestrian routes and amenities	<a href="http://www.mass.gov">www.mass.gov</a>
Traffic calming measures	Field work
Public spaces (Squares, plazas, streets)	<a href="http://www.mass.gov">www.mass.gov</a>
Green spaces	<a href="http://www.mass.gov">www.mass.gov</a>
Connectivity grid	Desk analysis



## 7 VII SECTION: VISUAL ANALYSIS

### 7.1 Map with view points



## 7.2 Pictures

At least 12; specify number code, date, day of the week, hour, notes on the people presence and or people behaviour, notes on the general quality of the environment.

### Picture n.1

Date: 29-01-2012

Day of the week: Sunday

Time: 12 p.m.

Notes:

Children using one of the two renovated playgrounds.



### Picture n.2

Date: 31-01-2012

Day of the week: Monday

Time: 1 p.m.

Notes:

One of the many graffiti made by local artist to beautify the area. The artist community is a backbone of the development of the entire area, especially between Washington Street and Harrison Avenue where art galleries are located.





**Picture n.3**

*Date:* 29-01-2012

*Day of the week:* Sunday

*Time:* 12 p.m.

*Notes:*

The Cathedral High School located in the Roman Catholic Archdiocese of Boston. In the background the Cathedral of the Holy Cross, the largest Roman Catholic church in New England. Religious leaders are considered as important stakeholders in the area.



**Picture n.4**

*Date:* 29-01-2012

*Day of the week:* Sunday

*Time:* 12 p.m.

*Notes:*

The marble and granite building constructed in the Renaissance Revival style between 1911 and 1917 and renewed with the help of South End Historical Landmarks and the Boston Redevelopment Authority. The renovated building - featuring three new floors of glass set back from the existing building - hosts the South End branch of CityBank, which also comes with a \$75,000 pledge over a three-year period to support the Washington Gateway Main Street Program.





**Picture n.5**

*Date:* 31-01-2012

*Day of the week:* Monday

*Time:* 1 p.m.

*Notes:*

The William Blackstone Elementary School is an example of the building's architecture at the time when the Orange Line Elevated Railway was in place. Neither the entrance nor windows overlooked on to Washington Street. Main Street Program created a new school playground facing the street.



**Picture n.6**

*Date:* 29-01-2012

*Day of the week:* Sunday

*Time:* 12 p.m.

*Notes:*

Franklin Square, one of the twin squares on Washington Street, was designed by Charles Bulfinch.

Seventy percent of Washington Gateway is within a National Historic District designed by the National Register of Historic Places.



**Picture n.7**

*Date:* 31-01-2012

*Day of the week:* Monday

*Time:* 1 p.m.

*Notes:*

Rutland/Washington Community Garden, given by the City of Boston and the Boston Redevelopment Authority in 1991 for permanent public benefit to the South End/Lower Roxbury Open Space Land Trust, Inc., a non-profit Neighborhood-based Organization.



**Picture n.8**

*Date:* 31-01-2012

*Day of the week:* Monday

*Time:* 1 p.m.

*Notes:*

The South End Community Health Centre, a project by Washington Gateway Main Street and example of the mixed-use of the building. On the ground floor some specialist stores such as Walgreens, while other floors are residential.





### Picture n.9

*Date:* 31-01-2012

*Day of the week:* Monday

*Time:* 1 p.m.

*Notes:*

Don Quijote Market is a historic grocery store that serves the district's low income and Hispanic residents. Main Street Program helped the owner to renew its storefront and expand the store.



### Picture n.10

*Date:* 29-01-2012

*Day of the week:* Sunday

*Time:* 12 p.m.

*Notes:*

An example of commercial diversification that meets different targets of clients.





### Picture n.11

Date: 29-01-2012

Day of the week: Sunday

Time: 12 p.m.

Notes:

The Main Street program worked with MBTA to redesign bus shelters and kiosks at each bus stop that show maps and historical information about the area.



### Picture n.12

Date: 29-01-2012

Day of the week: Sunday

Time: 12 p.m.

Notes:

One of the historic pictures shown on the kiosks. It represents Washington Street at the time of the dismantling of the Elevated Rail.





**Picture n.13**

*Date:* 29-01-2012

*Day of the week:* Sunday

*Time:* 12 p.m.

*Notes:*

The SOWA Open Market, with art galleries, a Vintage Market and a Farmer Market. The SOWA district (South of Washington), a former brick factory, was redeveloped by GTI Properties at the beginning of the new millenium.

