



TOWN OF CONCORD

TOWN HOUSE - P.O. BOX 535
CONCORD, MASSACHUSETTS 01742

OLD NORTH BRIDGE

MCI Concord Advisory Board Agenda

Monday, September 23, 2024 at 12:00 PM

Town House, Select Board Room and Hybrid via Zoom

More information on the MCI Concord Advisory Board,

MCI Concord closure, and FAQs:

<https://concordma.gov/3514/MCI-Concord-Closure>

Join Zoom Meeting

<https://us02web.zoom.us/j/84225481221?pwd=15ip4fk2czybCbbbDbazMqEmAztiXt.1>

Meeting ID: 842 2548 1221

Passcode: 152007

Dial In Toll-Free: 833 548 0276

#	Time*	Agenda Item
I.	12:00 PM	Call to Order - Clerk of the Meeting
II.	12:05 PM	Approve Meeting Minutes - September 9, 2024 – Lee Smith, Clerk of the Meeting
III.	12:10 PM	Discussion with the Urban Land Institute (ULI) regarding Technical Assistance Panels
IV.	12:40 PM	Subcommittee Reports - Legal & Government Affairs - Land Use Planning & Strategy - Community Outreach
V.	12:55 PM	Governance Matters - Discuss first Quarterly Report to Select Board - Citizen Correspondence and Feedback - Future Schedule of Advisory Board

VI.	1:10 PM	DCAMM Bi-Weekly Coordination Meeting Update
VII.	1:15 PM	Town Staff Update – Megan Zammuto, Deputy Town Manager
VIII.	1:25 PM	Public Comment
IX.	1:30 PM	Action Item Recap and Adjournment

**Times are approximate and subject to change*



The Town of Concord endeavors to make public meetings accessible to all members of the community. To request a meeting accommodation or modification, please contact our ADA Coordinator Jessica Porter at jporter@concordma.gov or at 978-318-3028. Please make any requests for accommodation or modifications at least two (2) business days prior to the scheduled meeting.

**Town of Concord
MCI Concord Advisory Board
Minutes
September 9, 2024**

Pursuant to notice duly filed with the Town Clerk, the MCI Concord Advisory Board convened in a meeting both in-person at 22 Monument Square on the 2nd floor in the Select Board Room and via Zoom at 12:00 PM on September 9, 2024.

Present were: Erin Cusker (joined at 12:07), Dan Gainsboro, Mark Howell, Peter Lowitt, Patrick McCurdy, Linda Miller, Elizabeth Akehurst-Moore, Emily Rush, and Lee Smith

Also present were: Megan Zammuto, Deputy Town Manager, Alan Cathcart, Public Works Director, Elizabeth Hughes, Town Planner and Shannon McAndrew, Management Specialist

Call to Order

Co-Chair Gainsboro called the meeting to order at 12:00 PM.

Approve Meeting Minutes

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to approve the meeting minutes from August 19, 2024 and August 26, 2024.

Roll Call Vote:

Erin Cusker – Not yet present
Dan Gainsboro – Aye
Mark Howell – Aye
Peter Lowitt – Aye
Patrick McCurdy – Aye
Linda Miller – Aye
Elizabeth Akehurst-Moore – Aye
Emily Rush – Aye
Lee Smith – Aye

Review and Discuss Proposed DCAMM Public Forum Agenda and Meeting Questionnaire for Public Forum

Co-Chair Dan Gainsboro opened the discussion regarding the DCAMM public forum agenda and proposed meeting questionnaire. Mr. Gainsboro noted that Co-Chair McCurdy will make comments on behalf of the Advisory Board at the public forum.

There was confusion amongst the Advisory Board members on whether the meeting questionnaire was distributed to the members ahead of this meeting, because it seemed that some members had seen it, and others had not. Ms. McAndrew clarified that she did not distribute the meeting questionnaire because it had been stamped as “confidential” by DCAMM.

Paul Lillehaugen, Senior Project Manager at DCAMM, commented on the meeting questionnaire for those members who have not seen it that it is meant for community members to complete if they attend the public forum, so that it will be available via hardcopy at the meeting and

Town of Concord
MCI Concord Advisory Board
Minutes
September 9, 2024

available to complete online from Thursday, September 12, 2024 (day of forum) to Sunday, September 15, 2024. Mr. Lillehaugen explained that the questionnaire is short, just looking to receive initial comments and feedback from the community on what they're looking forward to in the development process and what may give them pause in the development process.

The Advisory Board discussed the flyer that Town staff put together to be distributed at the public forum on behalf of the Board.

Ms. Akehurst-Moore suggested that a section be added to show how community members can sign up to receive notifications from the Town website regarding MCI Concord.

Mr. Smith suggested that the Select Board member listed be Mark Howell, as the Select Board member of the Advisory Board.

**Town Staff Update and Discussion of Wastewater Treatment Plant Offer –
Megan Zammuto, Deputy Town Manager & Alan Cathcart, Public Works Director**

Deputy Town Manager Megan Zammuto noted that the Town has received DCAMM's offer for the wastewater treatment plant, which is being reviewed by Town Counsel. Ms. Zammuto continued that the Town would meet with DCAMM in the coming weeks to coordinate on the offer. Ms. Zammuto also commented that she gave remarks to the Concord Bridge regarding the offer and that Public Works Director Alan Cathcart may discuss the offer and wastewater in general in the Town with the Concord Bridge further.

Co-Chair Gainsboro asked if the NOVO Riverside Commons development is planning to tie into Town sewer.

Keith Bergman, member of the public and Chair of the Concord Municipal Affordable Housing Trust, responded yes.

Ms. Akehurst-Moore asked why the Town should buy the treatment plant rather than the state continue to own it and the Town buy capacity from the state.

Public Works Director Alan Cathcart responded that the Town does not have to buy the treatment plant if the Town determines it is not worth it and that the offer is meant to be mutually beneficial for the Town and state.

Ms. Miller asked when Weston and Sampson's report would become available.

Mr. Cathcart responded that Weston and Sampson's report would be broader than in relation to development at the MCI Concord site, also looking into additional disposal sites and performing a needs assessment of the treatment plant itself. Once this is done, DCAMM will then hire an engineering firm to perform complimentary work.

**Town of Concord
MCI Concord Advisory Board
Minutes
September 9, 2024**

Mr. Smith noted that the Town should make its interests known relative to acreage at the site and understand how much capacity will be needed on site for development, since some capacity will need to be continued to be reserved for other state properties in the area, like the farm.

Ms. Akehurst-Moore asked if the state has an opinion about the Town's lack of wastewater capacity.

Mr. Cathcart responded that the state has appointed a task force to look into the challenges of regulations for wastewater treatment and capacity issues, as there is a disconnect regarding regulations potentially being too stark.

Ms. Cusker asked if capacity could be added by expanding the treatment plant and/or through the installation of septic systems. Ms. Cusker also asked if a cost for the treatment plant is known.

Mr. Cathcart responded yes, but that would not be easy and that a cost for the treatment plant has not yet been determined.

Ms. Zammuto lastly commented on interest in the Advisory Board's work in public outreach. Ms. Zammuto noted that DCAMM has not moved forward with hiring a consultant at this time because they would like to have a better understanding in the interests of the Board's goals in public outreach and understanding of the Board's asks in funding and resources.

Reports on Subcommittees

Co-Chair McCurdy opened the discussion on the Advisory Board's formation of subcommittees. Mr. McCurdy noted that next week, it is the Co-Chairs' goal to have the three subcommittees have their first meeting and identify a Chair of the subcommittee and to discuss the subcommittee's scope of work and goals moving forward.

Ms. Miller asked if the Co-Chairs would appoint the Chair of the subcommittees.

Co-Chair Gainsboro responded no, that this would be mutually decided on at the first subcommittee meetings.

Ms. McAndrew will coordinate the scheduling and agenda postings for the first subcommittee meetings.

Schedule for first Advisory Board Public Outreach Meeting

The Advisory Board concurred that the next public outreach meeting opportunity regarding MCI Concord will be in collaboration with the Concord-Carlisle League of Women's Voters for a First Friday event on Friday, November 1, 2024.

Mr. Smith noted that he thinks working with the League on public outreach events will be effective.

**Town of Concord
MCI Concord Advisory Board
Minutes
September 9, 2024**

Mr. Howell noted that perhaps the Advisory Board could also try to get an additional public outreach meeting opportunity on the calendar for October 2024, too.

Review of Existing Condition Information

Co-Chair Gainsboro commented that Mr. Boynton included a memorandum in the meeting packet regarding the Envision Concord 2030 master plan and that the Advisory Board still needs to consider how they would like to discuss the Town's various master plans.

Mr. Howell commented that the summary of Envision Concord 2030 was helpful. Mr. Howell continued and encouraged the Advisory Board to keep the Warners Pond Task Force's work in their consideration with master plans.

Mr. Smith noted that down the line it would be helpful to have a joint meeting with the Warners Pond Task Force. Mr. Smith also commented that the Advisory Board may want to consider an Energy/Sustainability subcommittee in the future.

The Advisory Board concurred on the consideration of the following Town master plans:

- Envision Concord 2030
- West Concord Master Plan
- Housing Production Plan
- Sustainable Concord Climate Action Plan
- Recreation Strategic Plan
- Open Space and Recreation Plan (2015)
- Junction Village Open Space Plan
- Wastewater Management Plan

Public Comment

Keith Bergman, member of the public and Chair of the Concord Municipal Affordable Housing Trust commented that he plans to make a statement at the DCAMM Public Forum on behalf of the Trust to endorse the incorporation of the Junction Village property in the master planning of the MCI Concord site and that the trust has reserved \$50,000.00 for pre-development expenses of the Junction Village property.

Adjournment

Upon a motion duly made and seconded, it was UNANIMOUSLY **voted:** to adjourn the meeting at 1:30 PM.

Meeting Materials:

[MCI Concord Advisory Board Meeting Packet for September 9, 2024](#)

[MCI Concord Advisory Board Meeting Recording for September 9, 2024](#)



ULI BOSTON/NEW ENGLAND TECHNICAL ASSISTANCE PANEL REPORT

REIMAGINING COMMUNITIES: MEASURING THE IMPACT OF TECHNICAL ASSISTANCE PANELS



**Urban Land
Institute**

Boston/New England

URBAN LAND INSTITUTE (ULI)

The Urban Land Institute is a 501(c) (3) nonprofit research and education organization supported by its members. The mission of the Urban Land Institute is to provide leadership in the responsible use of land and in creating and sustaining thriving communities worldwide. Founded in 1936, the institute now has over 40,000 members worldwide representing the entire spectrum of land use and real estate development disciplines, working in private enterprise and public service, including developers, architects, planners, lawyers, bankers, and economic development professionals, among others.

ULI BOSTON/NEW ENGLAND

The Boston/New England District Council of ULI serves the six New England states and has over 1,400 members. As a preeminent, multidisciplinary real estate forum, ULI Boston/New England facilitates the open exchange of ideas, information, and experience among local, and regional leaders and policy makers dedicated to creating better places.

ABOUT ADVISORY SERVICES

ULI Advisory Services panels offer unbiased and independent solutions to the most complex problems facing communities. Panels bring together the best and brightest from ULI's diverse membership — developers, planners, financiers, market analysts, economists, architects, designers, and public officials — to provide practical solutions and objective advice not available from any other source.

ABOUT THE TECHNICAL ASSISTANCE PANEL (TAP) PROGRAM

ULI Boston/New England's Technical Assistance Panels are modeled after ULI's Advisory Service Panels that serve to address the most challenging real estate and land use issues facing communities today.

ULI Boston/New England TAPs are convened by the Real Estate Advisory Committee, which consists of planning and development professionals who provide pro bono recommendations at the request of public officials and nonprofit organizations facing complex land use challenges. TAPs are assembled with a group of diverse professionals who have experience in the issues posed by the specific project. Each TAP spends one to two days visiting study sites, analyzing existing conditions, identifying specific planning and development issues, and formulating realistic and actionable recommendations to move initiatives forward. ULI Boston/New England's TAP program is sponsored in part by MassDevelopment and The Massachusetts Housing Partnership, who help identify communities that can benefit from the TAP program.

During a TAP, ULI Boston/New England members leverage their expertise in a one-day charette by analyzing existing conditions, identifying specific planning and development issues, and formulating realistic and actionable recommendations to move challenging land use issues forward.

THE REAL ESTATE ADVISORY COMMITTEE & ULI LEADERSHIP

REAL ESTATE ADVISORY COMMITTEE CO-CHAIRS:

Susan Connelly, Director of Community Assistance, Massachusetts Housing Partnership
Nyal McDonough, Senior Asset Manager, Taurus Investment Holdings, LLC
Larry Spang, Principal, Arrowstreet

REPORT STEERING COMMITTEE

Manikka Bowman, ULI Boston/New England
Emily Innes, Harriman
Richard Lampman, Berkeley Building Company
Christine Madore, MassDevelopment
Sara Marsh, ULI Boston/New England
Nyal McDonough, Taurus Investment Holdings, LLC
Claire O'Neil, MassDevelopment
Ed O'Rourke, Commodore Builders
Jamie Simchik, Simchik Planning & Development

ULI BOSTON/NEW ENGLAND DISTRICT COUNCIL

District Council Chair: Matt Pullen, NKF Capital Markets
District Council Vice-Chair: Carlos Febres-Mazzei, Quaker Lane Capital

STAFF

Michelle Landers, Executive Director
Manikka Bowman, Director of Policy and Outreach
Sara Marsh, Manager
John Wilson, Associate

ABOUT RIVERA CONSULTING, INC.

To produce and shape a more inclusive public commons, Rivera Consulting, Inc. is committed to the co-creation, innovation, and co-advancement of a 21st-century social contract. Our team has a multidimensional professional background that includes urban planning, government, nonprofit, public policy and political experience. In today's world and the one that is emerging, we understand the opportunities and challenges that our clients face daily to be successful. We work directly with change agents, public sector anchor institutions, community-based organizations, and movement building political candidates at the intersection of people, planning and politics.

Cover: Duck Mill, Union Crossing. Photo credit: Heidi Gumula, DBVW Architecture.



Table of Contents

Executive Summary	5
Project Narrative	6
Methodology	8
Quantitative Survey Results	12
ULI Boston/New England TAP Case Studies	16
Haverhill	17
Ashland	20
Lawrence	23
Worcester	27
Conclusion	31

Executive Summary

In partnership with ULI Boston/New England and its Real Estate Advisory Committee, Rivera Consulting Inc. designed and implemented a mixed-methods evaluation assessment of ULI Boston/New England's Technical Assistance Panels (TAPs). Spanning nearly two decades of municipal engagements, TAP panelists have advised 50 municipalities on issues of land use and economic development, along with other issues of local importance. This report set out to assess the impact of those engagements through the use of both quantitative and qualitative means, centered on the input and opinion of TAP community sponsors across Massachusetts and New England.

To inform the creation of those assessment tools, researchers developed a methodological impact framework based on the work of Professor Donald Kirkpatrick. His Four-level Training Evaluation Model highlights four key points of engagement for any technical assistance program: 1) Reaction, 2) Learning, 3) Behavior, and 4) Results. These engagement points informed the creation of both a program logic model and impact matrix that framed the assessment's discovery research. Quantitative and qualitative assessment tools were created with this baseline framework in mind.

Quantitatively, an online survey was deployed to assess what influence, if any, the TAP had on a municipality's behavior and approach to stakeholder engagement, planning, and development. This was followed by questions centered on observed outcomes in those municipalities related to the stated goals of ULI Boston/New England's recommendations and ideology.

According to survey respondents, 82% said their behavior and approach regarding "municipal planning and economic development" was affected, while 70% indicated the same for the "redevelopment of key municipal assets". For observed outcomes, 78% of respondents said their municipality attempted to implement planning recommendations contained within their TAP report, with 62% reporting their municipality had redeveloped at least one key municipal asset studied within their report in accordance with panelist recommendations.

Qualitatively, four Massachusetts TAP municipalities were chosen for long-form case study narratives: Haverhill (2011), Lawrence (2012), Worcester (2014), and Ashland (2017). These were informed by TAP community participant interviews with municipal mayors, planning staff, and nonprofit partners. The narratives confirm data collected in the quantitative survey that illustrate the utility of third-party advisory outfits such as ULI Boston/New England for communities that may lack the resources for in-depth planning exercises. Other TAP community participants often noted the value of panelists validating current municipal goals and strategies as a means to improved stakeholder engagement.

Project Narrative

Beginning in June of 2019, Rivera Consulting Inc. conducted a mixed-methods evaluation assessment of the ULI Boston/New England Technical Assistance Panel (TAP) program. Since 2002, the District Council had engaged in 50 TAPs spanning urban, suburban, and rural municipalities across New England, with the vast majority occurring in Massachusetts.

ULI and its members have been asked to study and offer recommendations on some of the most pressing challenges to municipal land-use and economic development strategies of today. In an intensive one- to two-day multidisciplinary engagement, community stakeholders of diverse backgrounds come together with ULI to offer their perspectives on issues as finite as sidewalk curb design to the seemingly infinite obstacles of the affordable housing crisis and climate change mitigation.

This assessment set out to design and enact a methodological framework to measure the impact of the TAP program upon participants and desired municipal outcomes. As communities continue to contend with an ever changing and challenging economic and developmental landscape, understanding the impact and role of an organization like ULI Boston/New England can set the stage for improved municipal development practices.

Project design and implementation was done in partnership with members of the ULI Boston/New England Real Estate Advisory Committee, the group of members who oversee the TAP program along with District Council staff. Members of the committee willingly devoted their time to provide feedback on all aspects of the assessment, lending their expertise and experience to shape the project design.

To develop a preliminary program impact model, researchers began by conducting an exhaustive cataloguing of all 50 TAPs, noting all study-area challenges and associated ULI member recommendations. This led to the identification of five primary TAP themes: key asset redevelopment, downtown revitalization, neighborhood revitalization, corridor revitalization, and municipal master planning. Additionally, the most often cited ULI member recommendations were identified, of which the top four were zoning reform, wayfinding/signage/streetscape improvements, increased connectivity, and private investment incentives.

Using Professor Donald Kirkpatrick's Four-level Training Evaluation Model¹, researchers developed a program logic model, as well as a TAP impact matrix that centered around the linear process of municipal outcomes in the realm of planning, zoning, public investment, and development.

With an impact mixed method model, researchers engaged the opinion of TAP community sponsors through both quantitative and qualitative means. An online survey was developed and sent to primary sponsors for all 50 engagements. The survey secured a response coverage of 84% of all TAP engagements, with 46 respondents in total. In conjunction, four qualitative

¹ Kirkpatrick, Donald and Kirkpatrick, James. Evaluation Training Programs: The Four Levels. San Francisco, CA, Berrett-Koehler Publishers Inc., 2006

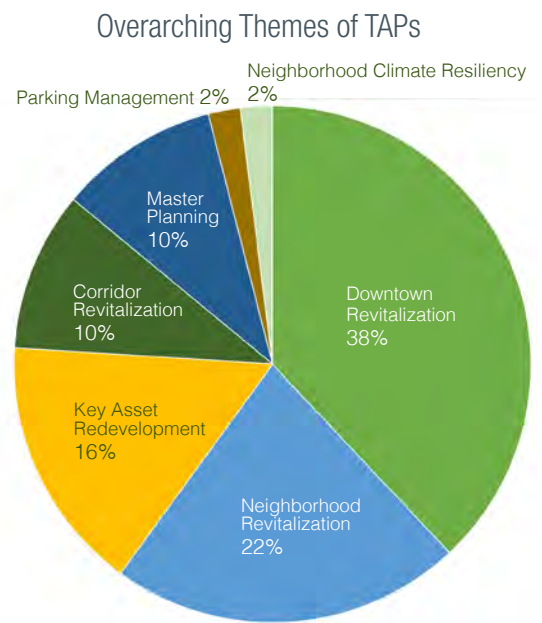
TAP case studies were done via stakeholder participant interviews with the communities of Haverhill, Lawrence, Worcester, and Ashland. These were chosen for the diversity of municipal demographics as well as the differing themes and challenges each presented.

We thank all community stakeholders throughout the Commonwealth and New England who graciously offered their time to participate in this assessment. As this report will show, the complicated nature and demanding rigor of municipal life places a premium on the time of those who made this assessment possible. It is our hope that this work strengthens and fortifies the relationship between New England municipalities and ULI Boston/New England, while illuminating the need for public/private/nonprofit partnerships that place a premium on long-term sustainable municipal planning and development. In our view, supporting and understanding the needs of municipal actors that strive on a daily basis to improve their communities is an important step in furthering the progress needed to create livable and welcoming communities for all residents.

Methodology

Discovery Research and the TAP Impact Model

The researchers read all of the 50 taps from the summer of 2002 to spring of 2019. Beginning with the TAP on the Somerville, Mass. Kiley Barrel Project site in June of 2002, researchers read and analyzed all 50 TAPs conducted by ULI Boston/New England. All engagements were summarized by both the specific challenges addressed within an individual TAP, as well as the recommendations offered by the ULI panel. Each TAP was assigned an overarching theme, of which seven were identified, summarized, and then catalogued to formulate a baseline ULI Boston/New England ideology, as well as support the creation of the quantitative and qualitative assessment survey tools.



Sixteen primary recommendations were identified. The following percentages indicate the regularity per a TAP in which a specific recommendation was utilized:

Key Tap Recommendations	% of times that the recommendation was made in ULI Boston/New England TAPs
Zoning Reform	65%
Wayfinding/Signage and Streetscape Improvements	57%
Increased Study-area Connectivity	55%
Private Investment Incentives	55%
Placemaking	39%
Residential Development	37%
Improved Community Engagement	33%
Improved Stakeholder Collaboration	29%
Mixed-use Development	27%
Increased Density	24%
Business Association Needed	22%
Parking Management Plan	18%
Increased Municipal Staff	12%
Transit Improvements	12%
Increased Green Space	12%
Environmental Action Needed	10%

To frame the short-, medium-, and long-term engagement points of the TAP process, researchers utilized the work of Donald Kirkpatrick, former Professor Emeritus at the University of Wisconsin-Madison. First developed in 1959, his Four-level Training Evaluation Model is the long-held standard bearer for conducting evaluations of technical assistance programs. Specifically, Kirkpatrick’s model provides an outline for assessing the efficacy of technical assistance programs focused on impacting learned behavior and desired outcomes. The four points of the Kirkpatrick Model and its relation to potential TAP impact are as follows:

Reaction:	Measures the TAP community’s opinion of the TAP on the day it occurs
Learning:	Measures whether or not the TAP resulted in a knowledge gain for the TAP community
Behavior:	Measures whether the TAP community actually applied the knowledge they gained in a valuable way
Results:	Measures return on investment by showing that changes in learning and behavior led to changes in municipal outcomes for TAP communities

Using Kirkpatrick’s model as an assessment guideline, follow-up research was conducted on all 50 TAP communities to determine how municipalities had utilized the report in the days, months, and years following ULI Boston/New England’s engagement. This research was done through a combination of municipal and state government press clippings, municipal planning documents, and primary government resources such as the yearly budget, municipal grants, and other state legislature items.

As a result, researchers identified four linear and ordinal policy areas that demonstrate the TAPs relationship to actual long-term municipal land-use and economic development: 1) Planning 2) Zoning 3) Public Investment 4) Development.

From this research, 15 TAP impact metrics were identified to summarize the different areas of impact in which municipalities had utilized ULI Boston/New England’s analysis and recommendations. These metrics were subsequently used to inform the development of both the quantitative and qualitative assessment survey tools.

<p>Planning</p> <ul style="list-style-type: none"> • Municipal Planning Document Completed/ Initiated • TAP Publicly Cited or Used in Planning Document • TAP Informs 3rd Party Analysis • Community Group or Municipal Committee Created in Response to TAP • Additional Staff Hired/Long-term Technical Assistance Acquired <p>Zoning</p> <ul style="list-style-type: none"> • New Downtown Zoning Overlay • New Village/Neighborhood Zoning • New Site-specific Zoning 	<p>Investments</p> <ul style="list-style-type: none"> • Increased Municipal/State Funding • Streetscape/Public Use Improvements • State Infrastructure Grants (MassWorks etc.) <p>Development</p> <ul style="list-style-type: none"> • Key Asset “Request for Proposal” Initiated • Key Asset Development Tax-credits Accessed • Key Asset Redeveloped • New Municipal Programming/Placemaking
---	---

To demonstrate the shared relationships between the TAP program's designed activities and its intended outcomes for municipalities, researchers then developed a TAP logic model to illustrate in a more detailed fashion the overall process in which a TAP community utilizes the multidisciplinary planning engagement.

ULI Boston/New England Logic Model

SITUATION

INPUTS	ACTIVITIES	OUTPUTS	SHORT-TERM OUTCOMES	INTERMEDIATE-TERM OUTCOMES	LONG-TERM OUTCOMES
ULI Members	Walking Tour	Two Hours of Study Area Discovery	Study Area Asset Identification	Increased Municipal Planning	Increased Municipal/State Funding
ULI Staff	Stakeholder Interviews	Two-Three Hours of Stakeholder Input	Study Area Challenge Identification	Informing 3rd Party Analysis	Wayfinding and Streetscape Improvements
Local Stakeholders	Closed-door Charette	Four Hours of Project Planning and Analysis	Study Area Solution Identification	Newly Formed Municipal or Community Groups	Key Asset Redevelopment
Physical Space (TAP Meeting Room, Public Presentation)	PowerPoint Creation	Two Hours of Public Discussion	Stakeholder Collaboration	Increased Staff or Long-term Technical Assistance	Downtown or Corridor Economic Revitalization
TAP Application Process	Public Presentation and Q + A	Two Months of Final Report Writing	Community Engagement	New Municipal Zoning	Increased Private Investment

EXTERNAL FACTORS

Quantitative Survey Tool

Following the creation of the evaluation TAP impact model, researchers developed a quantitative survey for municipalities, which comprise the primary TAP applicant and sponsor. The survey built upon the Kirkpatrick Model framework, with the majority of questions focused on Level-four "Result" municipal outcomes, as well Level-two/three "Learning & Behavior" retrospection. Due to some respondents being many years removed from the day of the TAP itself, Level-one "Reaction" opinions were not measured.

A demographic section asked for baseline information regarding the respondent's municipal position at the time of their TAP, how long they held that position, and if they currently still worked within that municipality. This was done to ensure an appropriate level of institutional municipal knowledge for the survey universe. Of the survey's 46 respondents, 84.8% had held

their municipal position for longer than one year at the time of their TAP, with 41.3% on the job for more than five years. At the time of survey distribution, 84.7% still worked within their TAP community, with 63% holding the same position they held at the time of ULI Boston/New England's engagement.

The survey universe was determined by culling the list of primary contacts listed by ULI Boston/New England in each TAP report, who were emailed requesting their participation in the online survey. Follow up phone calls were placed to potential respondents to answer any questions regarding the assessment and to encourage survey completion. A final follow up email was sent by ULI Boston/New England's Executive Director in order to ensure a robust response rate.

Survey language, metrics, and open-ended response inquiries were co-created with both ULI Boston/New England staff, as well as input and feedback from members of the Real Estate Advisory Committee.

Qualitative Survey Tool

Four TAP communities were chosen for participant-interview case study narratives: Haverhill, Lawrence, Worcester, and Ashland. The community selection process was done in partnership with both ULI Boston/New England staff and members of the ULI Boston/New England Real Estate Advisory Committee. These communities were chosen to display the variety and demographic diversity of communities of which the TAP serves, with population size ranging from 16,000 residents in Ashland to 185,000 residents in Worcester. Similarly, all four TAP engagements addressed distinct challenges that highlight an array of policy subject areas, such as, downtown revitalization (Haverhill), neighborhood revitalization (Lawrence), key asset redevelopment (Worcester), or municipal master planning (Ashland).

Similar to the quantitative survey universe, participant interview selection was derived from the primary contact list within each TAP report. Interviews took place either in-person or over the phone, with all interviews recorded and transcribed. Interviews were semi-structured, with a nine-question survey tool centered on the Four-level Training Evaluation Kirkpatrick Model.

The quantity of sources and sponsor type per case study varied. In total, 13 individuals contributed to the case study narratives. This included two municipal mayors, one town manager, seven current municipal employees, two former municipal employees, and one nonprofit project director.

Quantitative Survey Results

Of the 50 TAPs conducted by ULI Boston/New England through 2019, 42 municipalities participated in the online survey to assess their opinions on topics related to changes in municipal behavior and outcomes. The survey results that follow are presented based on a developed impact model that measures community-reported changes in learning and behavior following a TAP, and municipal outcomes on topics related to the stated goals of ULI Boston/New England's municipal engagements.

Level one “Reaction: *Measures the TAP community's opinion of the TAP on the day it occurs*

As previously noted, the quantitative survey did not ask TAP community sponsors to provide their view and opinion of the engagement on the day it was delivered. This was chosen due to the large passage of time for many respondents who understandably may struggle to recall their immediate reactions in real time. The case study portion of this report expands on the significance of this level through participant interviews.

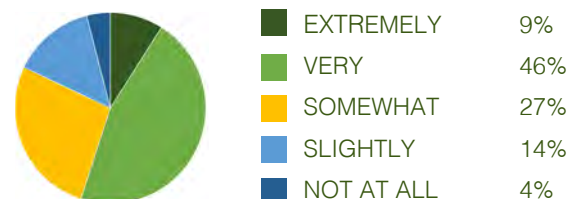
For future TAP engagements, researchers and ULI Boston/New England will be developing a small Level One “Reaction” survey tool to be distributed to primary TAP sponsors within a week of the TAP. This tool will serve to both assist TAP applicants in potential next steps and pathways of communication with ULI Boston/New England, while supplying ULI Boston/New England with an in-moment snapshot of their TAP delivery procedures and methods.

Level two/three “Learning & Behavior”: *Measures whether or not the TAP resulted in a knowledge gain for the TAP community and whether primary stakeholders actually applied the knowledge they gained in a valuable way*

TAP community sponsors were asked to assess what influence, if any, the TAP had on their municipality's behavior and approach to stakeholder engagement, planning, and development. Using a five-point Likert scale ranging from “extremely affected” to “not at all affected”, the survey asked how respondents may have learned from the TAP or how behavior or practices may have changed. Open-ended qualitative responses were collected as well to provide context from TAP community stakeholders.

82% of TAP community sponsors said their behavior and approach to **“Municipal Planning and Economic Development Strategies”** was affected.

Did the TAP process affect your municipality's behavior and approach to municipal planning and economic development strategies?

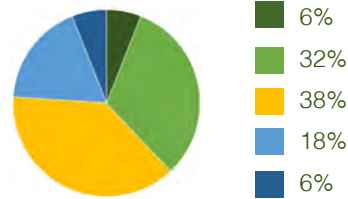


“ Our TAP represented a first bringing together of cross-sector partnerships and recommended many important best practices.

– East Boston, MA

76% of TAP community sponsors said their behavior and approach to **“Stakeholder Engagement”** was affected.

Did the TAP process affect your municipality’s behavior and approach to stakeholder engagement?

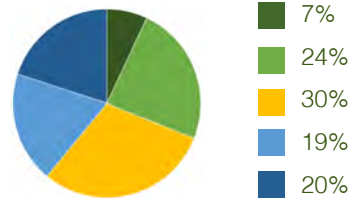


“ The TAP influenced our behavior to do significant community engagement for other projects being implemented in the city.

– East Providence RI stakeholder

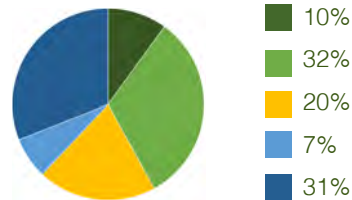
61% of TAP community sponsors said their behavior and approach to **“Municipal Zoning Strategies”** was affected.

Did the TAP process affect your municipality’s behavior and approach to municipal zoning strategies?



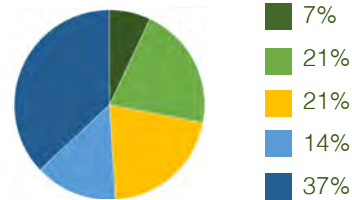
62% of TAP community sponsors said their behavior and approach to **“Shared Local Public-use Spaces and Streetscape Investments”** was affected.

Did the TAP process affect your municipality’s behavior and approach to shared local public-use spaces and streetscape investments?



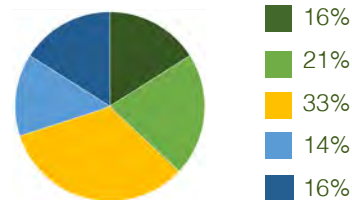
Only 49% of TAP community sponsors said their behavior and approach to **“Soliciting Potential State Government Partnerships”** was affected.

Did the TAP process affect your municipality’s behavior and approach to soliciting potential State Government partnerships?



70% of TAP community sponsors said their behavior and approach to the **“Redevelopment of Key Municipal Assets”** was affected.

Did the TAP process affect your municipality’s behavior and approach to the redevelopment of key municipal assets?



Level Four “Results”: Measures return on investment by showing that changes in learning and behavior led to changes in municipal outcomes for TAP communities

TAP community sponsors were then asked to assess what planning and development changes, if any, their municipality implemented in the years following the TAP. If they were unsure of any result, they were asked to select “I don’t know/Not sure”. Open-ended qualitative responses were collected as well to provide context from TAP community sponsors.

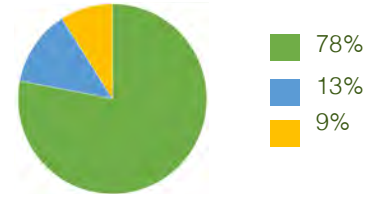
Planning & Zoning

LEGEND

- Yes
- No
- I don't know/
Not sure

78% of TAP community sponsors said their municipality took formal steps to implement planning recommendations contained within their TAP report.

Did your municipality take formal steps to implement any planning recommendations within your TAP report, regardless of the outcome?

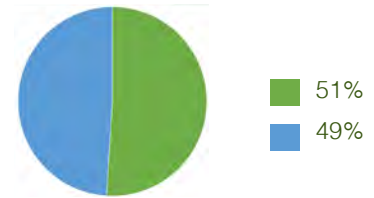


“ The TAP process is very valuable to towns like ours which suffer from a chronic lack of planning capacity. It models good planning behavior and demonstrates how to advance planning and development conversations in a meaningful way.

– Dedham, MA

51% of TAP community sponsors said their municipality hired additional staff or secured long-term technical planning assistance within two years of their TAP report.

Did your municipality hire any additional full or part-time staff, or hire any outside consulting group to provide long-term technical planning assistance, within 2 years of your TAP?

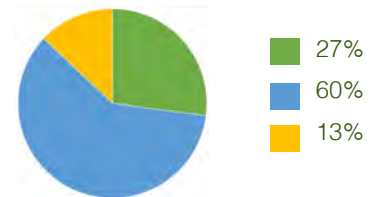


“ We stumbled out of the gate after the TAP report was issued, despite good intentions. We then reorganized the efforts to allocate funds for a contracted point person. Since then we've worked incrementally on many of the concepts introduced in the TAP report, ranging from wayfinding signage to making our marina area more vibrant.

– Northeast Harbor, ME

Only **27%** of TAP community sponsors said their municipality created new municipal committees or community/neighborhood/ business associations in relation to their TAP process.

Were any new municipal committees or community/ neighborhood/business associations created in relation to your TAP?

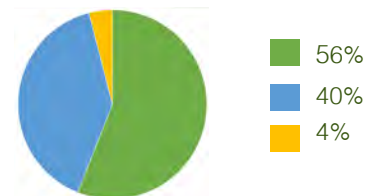


“ After the TAP, Northbridge established an Economic Development Committee that is utilizing the TAP report in a recently completed economic strategic plan. The TAP has helped establish a focus for this area in town.

– Northbridge, MA

56% of TAP community sponsors said their municipality has attempted to implement recommended zoning changes within their TAP study area.

Did the municipal government attempt to implement any zoning changes as it relates to the TAP study area?



“ The zoning changes adopted in 2018 were largely based on recommendations from the TAP report. The changes were overwhelmingly approved and had broad community support.

– Eastham, MA

“ We revised the Central Business zone to increase the area, add density, reduce parking and allow more as-of-right and residential only uses.

– Framingham, MA

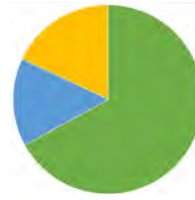
Within two years of their TAP report, community sponsors reported on a variety of municipal planning documents that utilized ULI recommendations:

- » Master Planning
- » Economic Development Strategies
- » Comprehensive Zoning
- » Housing Development
- » Streetscape Design Improvements
- » Parking Management
- » Green Space and Parks

Public Investments and Development

67% of TAP community sponsors said there were increased municipal investments related to the stated goals and recommendations of their TAP report.

Were there any increased municipal investments related to the stated goals and recommendations of your TAP report?



67%
15%
18%

LEGEND

Yes
No
I don't know/
Not sure

“ Our TAP process led directly to the award of a Site Readiness Grant, which queued up an \$18 million revitalization plan that is in development. That private development plan was in turn successfully leveraged by the community into \$1.5 million MassWorks infrastructure award, which will supplement \$3 million in local infrastructure spending.

– Clinton, MA

Only **33%** of TAP community sponsors said their municipality secured State Investments (such as MassWorks Infrastructure grants) related to the stated goals and recommendations of their TAP report.

Did your municipality secure any State investments related to the stated goals and recommendations of your TAP report, including State infrastructure grants such as MassWorks or programmatic investments through entities such as MassDevelopment?



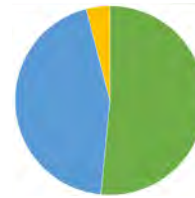
33%
51%
16%

“ We have highly limited resources and also limited land area. A recommendation in the report was to construct a municipal sewer system—that was, and still is, way beyond the financial ability of this community.

– Hamilton, MA

51% of TAP community sponsors said their municipality issued a “Request for Proposal” on a key developable asset addressed in their TAP report within five years of the engagement.

Did your municipality issue any Requests for Proposals for key developable assets addressed within your TAP report within five years of your TAP?



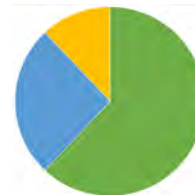
51%
44%
4%

“ The TAP Report set the stage for large-scale mill redevelopment projects. This has led to MassWorks Infrastructure grant awards, developers acquiring mill properties, on-going Brownfield remediation, and additional planning around streetscape, wayfinding, and housing.

– Chicopee, MA

62% of TAP community sponsors said at least one key developable asset addressed in their TAP report had been redeveloped consistent with ULI Boston/New England recommendations.

Were any key developable assets addressed within your TAP report redeveloped consistent with ULI Boston recommendations?



62%
26%
12%

“ A key aspect was having the TAP within the first year of our new Main Streets organization. For some time, people would reference ideas from the TAP. Because the parcels and challenges are so big and complex the results haven't yet come. Nevertheless, Union Square has been dramatically advancing around those tricky parcels to a position where the \$1 billion redevelopment is finally near a reality.

– Somerville, MA

ULI Boston/New England TAP Case Studies

Haverhill

Community Context

The Haverhill TAP took place in November of 2011 at the request of local municipal government officials. While it had been almost 40 years since its inception, Haverhill was still dealing with the ill effects of an urban renewal plan that saw the demolition of historic buildings throughout much of its downtown. It had left Merrimack Street and its adjoining river namesake relatively dormant for decades prior to ULI Boston's TAP intervention in 2011.

"You had a perfect case study," according to Andrew Herlihy, Division Director of Haverhill Community Development. "We were seeing signs of life in our historic western end of downtown, the Washington Street end, and it was just a wasteland on the eastern edge of downtown, where the urban renewal had occurred. ULI was able to get into the whole issue of how we deal with that."

With access and sight lines to the Merrimack River greatly restricted due to designs implemented decades prior, the appeal of residential development along the river had been limited. This, combined with archaic zoning provisions, had left the Merrimack Street corridor and riverfront lacking in the needed foot traffic to support local business.

"There was nobody living there," said Bill Pillsbury, Haverhill's Economic Development and Planning Director. "The buildings left there were literally a visual and physical barrier to the river. That key asset was not available to us to pursue because of the remains of urban renewal. We needed to make some major changes."

In the TAP application, city officials requested the panel address land-use and economic development strategies for the Merrimack Street corridor and the riverfront in downtown Haverhill. This included a number of key developable assets with the study area, including the long-vacant Woolworth Department Store and the adjoining Ocasio Martial Arts Building, a stretch of the corridor that many in the city considered the key to unlocking investment along the riverfront.

Panelists ultimately recommended the following high-level action steps and planning considerations:

- Enhance the destination-appeal and draw of downtown Haverhill as a whole, and Merrimack Street in particular, by means of creating anchor type draws of two types:
 - Unique public amenities (along with supporting public amenities such as streetscape)
 - Activity anchors such as theater, other cultural use, and/or innovation center
- Support private building redevelopment (and possibly anchor amenities) by means of:
 - Zoning and public parking allocation
 - Proactive redevelopment implementation in marketing and financial assistance

Impact Narrative

A. Reaction

Early in the process, Herlihy noted that with the sale of the city-owned Hale Hospital in 2001, the city had accrued nearly \$95 million in debt. “We had very little in the way of planning staff, planning expertise. The ability to do a study of this nature on our own was just not in the cards for us.”

In 2011, Pillsbury the sole city planner at the time, also responsible for economic development, community development, and health and inspectional services. In order to get a planning exercise of this magnitude off the ground and to parlay it into new investments and development, it needed to be initiated by outside voices and advisors.

“There wasn't a deep bench,” said Pillsbury. “The bottom line was we knew we needed to get some help. The TAP came in at the right time to give us a coalescing of thought around how to proceed.”

As the day of the TAP unfolded, much of the discussion centered on the 21-foot-high river flood wall, an obvious physical and visual barrier to connecting residents to the Merrimack River. With a visually unappealing and large structure complicating any potential accessibility designs, ULI panelists emphasized the need for a wholesale reshaping of the riverfront. The wall, maintained and overseen by the Army Corps of Engineers, wasn't going anywhere. Panelists suggested the next best option.

“The opportunity was presented and first catalyzed in people's thinking the day of the TAP which basically said: you can build on top of it,” said Pillsbury. “The Army Corps was very concerned. But we figured out from an engineering perspective how to build on top of the floodwall and to have a boardwalk structurally integrated into the floodwall in a way that wouldn't damage it.”

Panelists pointed to the recently developed and popular High Line boardwalk in New York City as a similar successful concept that planners could reference in the early stages of design. For Mayor James Fiorentini, the outside expertise of the TAP process helped lend credibility with municipal partners.

“ULI can help us focus, they can help us look at best practices in other communities,” noted the Mayor. “Having people like ULI come up before the City Council that night and say this is the best practice from other cities, that helped a great deal.”

B. Learning & Behavior

The redesign and increased connectivity of the riverfront was only half the puzzle for Haverhill planners. To take advantage of this potentially revived asset, the city and ULI panelists agreed that a renewed emphasis on a comprehensive permitting and zoning structure would be critical for the corridor. And with multiple property owners overlapping key areas for potential development, Pillsbury came out of the TAP with immediate action steps to make the study site more amenable to potential private investment.

“What we learned was that we needed to take a very aggressive approach in trying to proceed to get control of property down there,” said Pillsbury. “We had an old Woolworth Building on the corner, which had been there and shuttered for literally 42 years. How do we intervene in that process as a city and try to be catalytic to making some of those things happen?”

Pillsbury viewed the focus on zoning and land-use reform as a key pillar to the process.

“It gave us an opportunity to think outside the box about how to pursue the zoning changes,” said Pillsbury. “What we were able to do is make a monumental shift in introducing residences

into the downtown. That's something we had not done before. From a planning point of view, it was a rethinking of the traditional approach to zoning where we would be creating an environment where development could occur."

C. Results

Pillsbury highlighted the value of having a report to spur discussion with both state officials and federal officials who initially balked at the concept of a newly constructed boardwalk.

"We would go in and sit down with Secretaries of Economic Development or [other officials], and we'd say, 'hey, we want to build a boardwalk', and they'd say 'okay, where's your design?'," said Pillsbury. "Having a conceptual document as a preliminary roadmap was critical. I think the TAP document really did help us in that regard quite a bit."

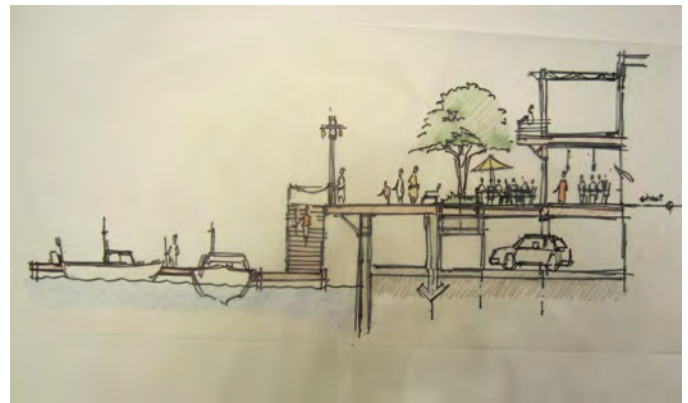
"I wrote a lot of these state grant applications, and I literally would mention in every one, if not lift wholesale, stuff from the ULI report," said Herlihy. "To show that this isn't just our opinion, we had a group of 20 outside professionals come in here, and this is what they came up with. It definitely helped us when we were trying to attract state and federal funding."

This led to deeper conversations with representatives from the Greater Haverhill Foundation, which had participated in the TAP process during the stakeholder interview process. After a series of nonprofit partnerships, the redevelopment of both the Woolworth Building and the Ocasio Martial Arts building was complete. Now known as Harbor Place, the two-building, mixed-use complex features 80 mixed-income rental units, 15,000 square feet of ground-floor retail space, and more than 50,000 square feet of commercial space for tenants including UMass-Lowell, which utilizes the first floor as a satellite campus. The project was supported with more than \$13 million in MassWorks infrastructure grants acquired by the city, with public investment supporting connections to the boardwalk.

Now with nearly 1,600 feet of new boardwalk being built on top of the flood wall, and anchor developments such as Harbor Place thriving, Herlihy looks back on the 2011 intervention as a clear marker for the turnaround of this once-struggling area of downtown Haverhill.

"I consider it to be sort of a turning point," said Herlihy. "It seemed like the history of downtown was losing stuff up until that point, losing this store and this long-time place would go out. It was always about losing stuff. Ever since the TAP it's been about gaining stuff, we've been adding, adding, adding. It's been a different dynamic down there."

"People saw the vision," said Fiorentini. "Words don't really count, but visions do."



Haverhill Boardwalk Rendering, Before. Photo credit: Provided by the City of Haverhill.



Boardwalk and Rail trail, After. Photo credit: The City of Haverhill.



Rear view of Harbor Place. Photo credit: The Architectural Team.

Ashland

Community Context

The Ashland Technical Assistance Panel (TAP), done in partnership with sponsor MassDevelopment, took place in December, 2017 at the request of local municipal government officials. At the time, Ashland had already made some progress in repurposing land for dense residential development, but it was understood that planning and action steps were needed to change the perception of Ashland as just a “bedroom community”.

“We had the genesis of this downtown revitalization project,” said Ashland Town Manager Michael Herbert. “We were really at the nascent stages of our infrastructure planning. Us saying it is one thing, but when you have a group of architects, designers, and professionals outside of the organization saying the same thing, it lends credibility. We’ve really kind of been moving along since the TAP.”

Having recently begun her role as Ashland’s Economic Development Director at the time of the TAP, Beth Reynolds immediately viewed stakeholder engagement as the key to this culture shift.

“Growing the business community, as well as linking the business community with residents downtown, that was one of the big things when I got here,” said Reynolds. “From the minute I started, we had been talking about revitalizing downtown and giving people a reason to come downtown. When we did the TAP, the same things came up that we had been hearing, so it meshed with what we were working with.”

In the TAP application, officials requested the panel address three core issues:

- Considering current market forces, what mix of uses presents the greatest potential for downtown redevelopment?
- Do any state and federal environmental permitting challenges exist for future downtown development?
- What can the town do to stimulate private investment downtown?

Panelists ultimately recommended the following high-level action steps and planning considerations:

- Encourage a “sense of place” and downtown walkability
- Conduct feasibility studies to discover best uses for town-owned parcels
- Leverage town-owned properties and incentives to attract private investment

Impact Narrative

A. Reaction

On the day of the TAP, ULI panelists noted challenges with the walkability and connectivity of downtown Ashland to both the north and south. To capitalize on any new residential developments and increased retail offerings, officials had to implement strategies to stimulate pedestrian activity for businesses.

As the TAP report states, Ashland had to “Create A ‘There’ There,” in both the forward-facing built environment of local businesses and the pedestrian design that encourages local residents to populate downtown. That meant engaging both local stakeholders and state officials to transform the lived environment.

“The TAP definitely got more people engaged,” said Reynolds. “I was just looking at the TAP interview stakeholder list and I think the process helped show them that we wanted to make this community big and strong and vibrant. I think they needed to see that in our leadership. When we did this, it showed them that we were in it for the long haul.”

Assistant Town Manager Jennifer Ball agreed, seeing the TAP process as a way to bolster revitalization strategies that had long been in discussion prior to the intervention.

“We had several plans that people had undertaken over the years, and I think it validated a lot of those ideas,” said Ball. “The process helped in legitimizing those, which is really helpful. That day helped legitimize some of the things we were hearing, both formally and informally.”

B. Learning & Behavior

Coming out of the intervention, Ball and her colleagues moved on a direct recommendation from the TAP report that called for mechanisms that could incentivize storefront and signage improvements. Panelists suggested a Facade Improvement Grant program that could catalyze built environment improvements as part of an overall branding campaign. Officials took a proposal to the Ashland town meeting in 2018 immediately following the TAP, which was subsequently approved by residents.

The Sign and Facade Improvement Program “matches up to half of the project’s cost or \$5,000 (whichever is less) for facade and/or sign improvements with town funding through the Ashland Economic Development Incentive Program.” Funding can be used for such projects as exterior signs, awnings, landscaping, and correction of any code violations, amongst other amenities.

“We’ve already approved about \$46,000 to go out to new businesses coming in, as well as sign and facade improvements for existing businesses,” said Reynolds.

For Herbert, the facade grant program was emblematic of a bigger shift in municipal priorities coming out of ULI Boston’s intervention.

“One of the things that the TAP process did was reinforce the fact that you need to have this public investment to really spur the private investment,” said Herbert. “I don’t think you can point to the TAP as being the single point of success for this, but it did help us reinforce that point that you need to make these public investments to spur private investment to get the kind of downtown that you want.”

C. Results

With that in mind, Ashland undertook a larger downtown planning initiative with the goal of implementing a new parking utilization plan, undergrounding of existing utilities, and improving the streetscape with wider sidewalks and new bike lanes for major corridors. With the TAP report



RiverWalk Bridge, photo credit: The Town of Ashland.



The Bagel Table, photo credit: The Town of Ashland.

and larger scale planning initiative in tow, officials secured \$6.8 million in municipal funding, along with a \$3 million MassWorks Infrastructure Grant.

“We were able to get \$10.5 million appropriated at our Town Meeting, that’s pretty much unheard of in this town,” said Herbert. “Three years ago, that was just kind of a pipe dream.”

Those investments are also supporting efforts to increase residential connectivity to the downtown, a key TAP recommendation. In October of 2018, the town broke ground on the Riverwalk Trail Enhancement Project, an effort nearly 10 years in the making. Critically, the new trail will connect the Ashland MBTA Commuter Rail Station to downtown via a short-span bridge.

“One of the things that was recommended in the TAP was to formalize the gateways into town from the north and south,” said Herbert. “We’ve really started to do that, especially on the north end with the Riverwalk project, so if you’re driving up that way, you’ll see this big bridge that’s being constructed right now. We’ll be doing more of that design and implementation through the downtown streetscape process.”

Officials also secured a grant from MassDevelopment to explore the possibility of a Business Improvement District (BID) within Ashland. Through the BID feasibility analysis, Reynolds held public forums to engage local business owners to gauge interest in their participation as well as formalize increased pathways of communication.

Reynolds said planning exercises like that have been key to Ashland’s recent success, and that the TAP process helped her and others rethink traditional development approaches.

“It’s okay to think outside the box, and I don’t think a lot of communities do that. I don’t know if this is just something with the TAP, but when it came in, we started thinking of things; thinking about the future, thinking outside the box. You take a few risks, and you ask a few questions, and some things stick and some don’t. But you can’t be afraid to try, and I think that’s important in this process.”

And according to Herbert, it’s that combination of new ideas, along with the validation of old ones, that made the TAP a worthwhile endeavor for him and his team.

“Eventually, you stay in the job long enough, there is a polarization that can happen,” said Herbert. “People think you’re just saying something because it’s what you’ve always said, and because it reinforces the vision that you’ve put forward. But when you have a group of disparate professionals coming together, looking at the same evidence, and seeing the same thing; it’s really huge.”

“It helps build trust,” said Reynolds. “Really, ‘we know what we’re doing, you can trust us’.”

Lawrence

Community Context

The Lawrence Technical Assistance Panel took place December, 2012, done in partnership with MassDevelopment and the nonprofit community advocacy organization Groundwork Lawrence. Still in the midst of recovering from the Great Recession of 2008, market realities were heightening the challenges of redeveloping expansive and long-vacant mill properties across the North Canal Historic District.

“At the time the city had really little resources, financially as well as human resources,” said Brad Buschur, Project Director of Groundwork Lawrence. “I think whenever your city is limited, with no resources to provide a stimulus, you really embrace the opportunities presented to you.”

When asked about the challenges Lawrence and the North Canal faced prior to the TAP, Mayor Dan Rivera—an At-Large City Councilor at the time—was succinct.

“All of them,” said Rivera. “We had a hodgepodge of people trying to do good things, real Herculean efforts to make things better without real planning. We had all these old mill buildings that everyone was trying to figure out how to redevelop and bring online, and put into production, and I’m positive that the city was not being very helpful. I think it was ‘opportunity without direction’.”

In the TAP application, the City and Groundwork Lawrence (co-applicants) articulated three specific questions for the panel to address as it considered the existing conditions in the North Canal Historic District. These were:

- What are the main factors impacting high vacancy rates and slow lease up of mill properties?
- What strategies should the mill owners implement to facilitate more lease up?
- How can a City government with strained resources support the strategies?

Panelists ultimately recommended the following high-level action steps and planning considerations:

- Smooth the entitlement process by fast-tracking permitting and empowering a development point person
- Leverage local and state relationships, including private and nonprofit community actors
- Be creative and clever in the judicious use of investment mechanisms and tax credits
- Focus on transportation and the development of comprehensive streetscape planning



Duck Mill, pre-development, photo credit: ULI Lawrence TAP.



Duck Mill, Union Crossing. Photo credit: Heidi Gumula, DBVW Architecture.

Impact Narrative

A. Reaction

Prior to the day of the TAP itself, representatives of the community will meet with panel members to discuss the upcoming engagement and review the submitted application to provide context for the upcoming walking tour and stakeholder interviews. For Jim Barnes, Lawrence's Community Development Director at the time, that planning session set a standard that immediately established metrics of success for him and his team.

"That planning meeting was really helpful," said Barnes.

"We wanted to make sure that we had something that was a disciplined, well-organized, and professional operation."

That standard, according to Barnes, carried over to the day itself.

"The preliminary presentations were really good, it was just really professionally done," said Barnes. "It brought business, economic development, and political leaders together, with a group of professionals, architects and engineers. That was really positive at the time. We were dealing with political leaders who had spent a lot of time sniping at each other, so it was nice to have this level of professional discipline."

And in older industrial cities like Lawrence, according to Rivera, a culture of long-term planning can be difficult to develop in light of ongoing daily challenges that require immediate municipal attention. Like Barnes, Rivera saw the TAP process as an important exercise to be replicated and recommended amongst community stakeholders on a neighborhood level.

"It made it so that the discussions were bite-sized enough," said Rivera. "That's what we did in the North Canal District. It helps you see what could possibly be next. I think that's what this planning process did, it set up a culture of plan, design, construct, build, and I think people have been running with it."

Prior to that point, according to Rivera, panel members spurred discussion that often became stagnated among local municipal actors.

"I think one of the challenges of local leadership is that the closeness breeds contempt," said Rivera. "If you call in an outside outfit, with a high cache and proven record of doing other stuff, then everyone sits up and flies right. When ULI did this and had these discussions, everyone wanted to make sure they were getting the best out of it for them. That's always a huge problem to get people to think past what's the problem of the day."

B. Learning & Behavior

As the newly elected Mayor of Lawrence in 2014, Rivera agreed with ULI Boston/New England's assessment that empowering the city's planning and development departments was a top priority. As a first step, Rivera hired a municipal Planning Director who had deep urban planning training and experience, a shift from previous mayors who had installed appointees who often lacked the professional preparation and typically served as a political appointee of the Mayor. He also reorganized the Offices of Community Development, Economic Development, Inspectional Services and Planning functions under the umbrella of the newly formed Office of Planning and Development. For Rivera, it was an effort to institutionalize a depoliticized planning ethos, critical for effective management and development of land use and economic development.

"Now, the Economic Development Director sits out there with the planners and doesn't get caught up in the day-to-day troubleshooting of my office," said Rivera. "I would be surprised if there's not a direct line between ULI Boston's effort and the people who were at that table making that reform a reality. It's one of the things we did early on in my administration because we wanted to get the development stuff on track."

As the city's Community Development Director, Barnes claims the shift in planning priorities had a direct effect on resource allocation as he and others have also lobbied the Commonwealth for public investment.

"Once we had the director for the Office of Planning and Development on board, Mayor Rivera made sure that that person was at every planning commission meeting," said Barnes. "That was really important. The TAP report and a few others became the basis for when we started to make our case to one funder or another."

"Showing MassDevelopment that we could do a process like this led to other opportunities with them as well," said Buschur, noting the study area had been designated as Transformative Development District by MassDevelopment in 2018. "It developed trust that the city is going to be present and show up."



Ferrous Technology Park Groundwork, before and after. Photo credit: Groundwork Lawrence.

C. Results

Of the seven key developable assets referenced in the TAP study area, five have been wholly redeveloped or are nearing the end stages of redevelopment as of early 2020. That development was supplemented by a series of MassWorks infrastructure grants totaling over \$9 million that included significant public investments along the North Canal mill corridor. The Duck Mill has been redeveloped into low-income housing, serving 73 families, while the Pacific and Everett Mills continue to add new housing options. Additionally, the former Ferrous Technology site has been converted into a widely-used public park. In total, over 1,000 new housing units have been developed at former mill sites since 2013.

“There’s been a lot of affordable housing development that’s happening in the Mill District,” said Buschur. “It’s really interesting to walk that same route today and see mill courtyards in big areas that were once derelict. It’s really kind of remarkable to see the transformation that’s happened.”

Rivera concurred, while noting the planning fatigue that can occur in gateway communities that struggle to produce results. For the Mayor and his administration, a planning exercise like the TAP provided a realistic roadmap on a neighborhood level that made change manageable.

“I think generally people felt like planning was a waste of time, because we never did what we planned for,” said Rivera. “Frankly, in communities like Lawrence, we get studied to death. The question is always, ‘what do we do with the information?’ I think for the first time after this plan was done, the North Canal felt like there was a trajectory and a set of facts for the area that got them to be one of the best prepared development sectors in the whole city.”

Worcester

Community Context

The Worcester, Technical Assistance Panel, done in partnership with sponsor MassDevelopment, took place in September, 2014 at the request of local municipal government officials. Often described as the northern gateway to downtown Worcester, city officials had dealt with several “stop and starts” with the three architectural pillars of Lincoln Square.

There was the old Worcester County Courthouse, a 246,000 square foot structure that had been vacant since 2007. Across the street was the Memorial Auditorium, which ceased operations in 2007 and had sat largely vacant since 1999. And immediately to the east was the former Boy’s Club, a 40,000 square foot building which had been wholly inactive since 2006.

“We had these three great big buildings that were sitting there,” said Amanda Gregoire, Worcester’s Senior Project Manager in the Executive Office of Economic Development. “We were having difficulty getting folks interested in them.”

For over 80 years, these three massive structures comprised the heart of Lincoln Square. But for nearly a decade, little movement had occurred to redevelop these key downtown assets.

In the TAP application, officials requested the panel address three specific topics:

- What types of uses would be a good fit for the identified parcels?
- How can the city create connectivity between the parcels, what types of infrastructure improvements could help facilitate this connectivity, and do any current features serve as impediments to connectivity?
- How can the City encourage unique and sustainable development and what types of funding mechanisms exist?

Panelists ultimately recommended the following high-level action steps and planning considerations:

- Avoid bundling the development of all three properties within one plan
- Consider a variety of large-scale residential mixed uses for the Courthouse, an institutional reimagining for the auditorium, and creative tax-credit mechanisms for the Boy’s Club
- Complete surrounding streetscape improvements while engaging local universities in the development process



Worcester Court House Annex, photo credit: Trinity Financial.

Impact Narrative

A. Reaction

Having been built in 1832, the courthouse had undergone several renovations and additions over the course of the prior 180 years. Much discussion on the day of the TAP centered on possible remediation efforts. Notably, a large annex was installed behind the original historical structure in 1954. Originally, officials viewed the annex as an eyesore that clashed with the original architecture, making it likely to be demolished to make room for parking along with any new mixed-use development. TAP panelists noted however that the annex, with its “layout and large windows” would be conducive to residential use. Paul Morano, the city’s former Director of Business Assistance, was surprised with the reaction as he led the walking tour, but that observation turned into a key selling point with potential developers.

“I remember when we walked through that building, and other panelists said it that evening as well, that it doesn’t make any sense to knock that down, you could just use it as housing,” said Morano. “So the [eventual] developer decided to keep the rear portion and convert it into housing.”

Michael Traynor, Worcester’s Chief Development Officer, noted that “once we did a request for interest, every developer that answered wanted to redevelop that annex.”

For Morano, the value of the TAP wasn’t just to bolster potential external partnerships. It provided credibility with elected officials who valued the voice of outside experts.

“When I was with the City, the administration could do a plan and submit it to the City Council and they’d be like, ‘oh sure, that’s fine,’” said Morano. “But when you have someone like ULI Boston/New England come in and present, who’s an expert, they look at it totally differently and say, ‘this is fantastic.’ So sometimes you just need that name on the plan.”

B. Learning & Behavior

As the TAP recommended reuse option for the Courthouse, the city moved forward with developing the historical structure for residential use. As for the Memorial Auditorium however, both panelists and stakeholders viewed possible redevelopment options as much more fluid.

“The auditorium, I think, for a long time had been the one that no one was quite sure how to tackle,” said Gregoire.

“It was always the wild card,” added Morano.

With similar large-scale performing arts centers already thriving throughout the city, restoring the building to its original use was considered infeasible. And its present design did not lend itself



Worcester Court House, photo credit: Tocci Building Corp.

easily to residential development, making any transition to housing costly and time consuming. The TAP report stated that “the time may have come to reimagine the property as a place where people come together in new ways.”

“The TAP helped take Lincoln Square from just a planning exercise to something that was alive to people in a way it wasn’t before, especially with the auditorium,” said Gregoire. “Through this plan, we engaged the auditorium board in a way that we hadn’t up until that point.”

Gregoire added that having the TAP report was an important step for Memorial Auditorium board members who had struggled to conceptualize possible reuse strategies in the previous decade.

“It was a lack of something to point to at the end of the day,” said Gregoire. “The TAP gave a jumping off point to say, here’s some ideas for what could happen with this building and the future of this building. It catalyzed some creative thinking that maybe wasn’t quite there yet.”

“We had a couple of unsuccessful starts trying to bring some groups together,” said Traynor. “I think the TAP process really got our focus and our thinking in line with how we were going to do this. The city couldn’t do it alone, we were going to need some partners.”

New efforts to generate excitement and interest in the auditorium began in earnest soon after the TAP. Auditorium management began opening up the building to locals and tourists alike who were interested in touring the historic structure. This aligned with the panelist recommendations that sought to activate the surrounding area as the city explored viable reuse options.

“The manager started opening the auditorium and letting people do little tours as a nostalgia piece, just to generate some buzz and activity,” said Gregoire. “They did a couple of events there too. So this was the very start of those sort of activities.”

C. Results

In December of 2018, Trinity Financial signed a deed on the Courthouse, making it a taxable property for the first time in the 174-year history of the building. In response, the Department of Housing and Community Development (DHCD) committed state and federal Low-Income Housing Tax Credits to the redevelopment, generating \$20.9 million in equity financing for the project.

The redeveloped courthouse will consist of 117 housing units. Of the 117 units, thirteen will serve extremely low-income households. Thirty-seven units will serve households at or below 60% of Area Median Income (AMI), while 16 units will be deemed affordable at 80% of AMI. Forty five will be so called “workforce housing” units, with only the final six units reserved for market-rate housing.

Morano emphasized MassDevelopment’s involvement as a TAP sponsor as being critical to opening the door to state funding partnerships, easing the process in which local officials made the case for public investments in the property.

“It made it a lot easier for MassDevelopment to make the case for state funding,” said Morano. “It’s a lot easier for them to make the case for state funds if there’s a plan like this going, that what we’re trying to do makes sense.”

As noted in the TAP report, panelists viewed the auditorium ripe for collaborative institutional use or an arts and incubator/maker space. In May of 2019, the city came to an agreement with the Architectural Heritage Foundation (AHF) and Becker College with the goal of a large-scale renovation that will repurpose the building into an innovative technology, arts, and education center.

And in September of 2018, the city sold the former Boys Club to a development company for \$300,000. While originally slated to be a school for children with autism, the new owner is now soliciting new proposals for potential development as of May 2019.

With AHF on track to complete its purchase of the auditorium in June of 2021, the city is nearing its goal of placing all three landmark Lincoln Square properties on its tax rolls for the first time in the city’s history. And with a combination of new residential development and diverse institutional and commercial offerings on the way, Lincoln Square has become emblematic of the changing landscape of a new and thriving downtown Worcester. And for Gregoire, the range and variety of voices offered by ULI Boston/New England and its members served as an important factor in the years that followed.

“The diversity of the people who served on the panel, they weren’t from all one industry,” said Gregoire. “Getting that holistic view was great. When you’re working in planning, you have that one perspective. On our own, we wouldn’t have been able to hand pick this great group of industry professionals across sectors and bring them in. It gave us a tool that we would have never been able to have.”

Conclusion

Technical Assistance Panels are just one example of how ULI engages its members to achieve its mission. They show the power of bringing people together to work through complicated issues, and how land use experts, municipal officials, and community members can leverage a range of experience and perspectives to make communities better.

It is inspiring to ULI staff and members to see their hard work bring to fruition real change. To see housing, community space, and commercial real estate where once there was unused or underutilized property is one of the most visible examples of how ULI members can impact the built environment. It is incredibly rewarding to bring a fresh perspective to a community that may underestimate its potential to attract investment or that may benefit from private sector insight.

Through the course of these many TAPs, ULI staff and members have had the opportunity to work with an array of dedicated and talented planners, economic development professionals, municipal staff, and elected officials. The TAP process is where public private partnerships begin. We understand that there is some risk involved in inviting a group of unbiased real estate practitioners to examine a thorny local issue and potentially make unwanted or unexpected recommendations. However, we've learned that communities are often willing to take the risk because of ULI's long history of integrity – and our strong brand. While not all TAP recommendations are implemented, our panelists continue to provide the advice that they think will help the community achieve its goals.

The scope of this research project represents over 5,000 volunteer hours at a value of nearly \$1,000,000. Over 300 members have volunteered their valuable time to give back to communities. On behalf of the Urban Land Institute, we wish to extend to them our thanks.



**Urban Land
Institute**

Boston/New England

www.boston.uli.org

DRAFT – WILL BE FORMATTED BY SHANNON MCANDREW ONCE DISCUSSED BY BOARD

Town of Concord - MCI Concord Advisory Board – Quarterly report

September 10th, 2024

Dear Selectboard, in accordance with the charge of the MCI Advisory Board (AB), we are pleased to present our first quarterly report for your consideration. Given the complexity and far-reaching nature of this charge we are restating the goals and duties and provide an update (*in italics*) on the progress of each bullet below:

The purpose of the Advisory Board is to educate and advise the Select Board on the most effective strategy to achieve a disposition of the MCI Concord property most favorable to the interests of the Town. The Board will rely on community input and the expertise of its members.

Duties

- Begin community outreach to learn the preferences of Concord residents and create a foundation for informed, sustained dialogue with townspeople. Hold at least one public forum to solicit community ideas. *The AB has created and populated three subcommittees to effectively distribute and expedite the completion of the duties. These three subcommittees include: Legal/Government, Visioning, Planning and Land use and Community Engagement. The AB plans to introduce itself to the Concord residents at DCAMM's MCI-Concord Redevelopment first Public Hearing & Information session scheduled for 7PM on the night of September 12th. With the help of town staff, the AB created a one-page project explainer flyer with contact information and a QR code to enable residents to learn more about the project.*
- Convene listening sessions, focus groups and interviews with community stakeholders to deepen understanding of the site and identify the opportunities and challenges of the site. *The AB views this duty as one of the most critical aspects of its charge and has begun to develop a scope of work and outcomes to facilitate the hiring of an outside communications consultant.*
- Coordinate and communicate with DCAMM. Serve as a community voice to DCAMM efforts regarding the site. Approved: April 16, 2024. *The AB has met with DCAMM project staff on multiple occasions to familiarize themselves with the status of the project and critical timetables. Dan Gainsboro meets biweekly with members of the DCAMM project team as well as town staff to ensure efforts are well coordinated.*
- Explore other state agencies (MAPC, Mass Development, MADOT, etc.) and advise the Select Board on how to integrate their services. *The AB has received and reviewed a memo from DOT regarding the status of planning for the Route 2 Corridor improvements. The AB will be meeting with DOT later this fall.*
- Determine the criteria and priorities of the town to evaluate potential scenarios should the project advance into the Planning Phase. *The AB has begun to develop goals and success criteria for the this effort and expects to further refine these criteria in the three subcommittees over the next several weeks.*

- Research “Best Practices” from successful state projects and “What to Avoid” from failed – or delayed – projects. *Individual members of the AB have collected and shared with the entire AB recent examples of similar state projects. In addition, the AB is exploring the feasibility and benefits and costs of utilizing the Urban Land Institute (ULI) Technical Assistance Program (TAP) and is scheduled to meet with members of the ULI program at the September 23rd meeting of the AB.*
- Work with the Town Manager’s MCI staff team to highlight municipal needs, opportunities, and concerns. e.g. Waste Water Treatment Facility. *The AB has met with Alan Cathcart, DPW Director, to better understand the approach the town is using to consider and plan for the possibility of acquiring the existing wastewater treatment plant the state owns located at the MCI site. Consideration will be given to how this additional capacity would fit into the town’s comprehensive wastewater plan (CWP). In addition, the AB expects to meet with CMLP as well as the Comprehensive Sustainable Energy Committee and affordable housing groups at future meetings.*
- Keep abreast of legislation and legislative hearings to propose and/or respond to potential changes. *The AB is in regular contact with State Representative Simon Cataldo’s office and State Senator Mike Barret to ensure that they are kept abreast of the latest developments relative to the MCI property.*
- Explore funding opportunities to offset lost PILOT, utility and any other revenues as well as funds for planning efforts. *The AB envisions this being a key part of the Visioning, Planning and Land use subcommittee’s work and will incorporate analysis of economic build out scenarios as part of the outside consultant work.*
- Develop likely scenarios and the fiscal impacts to the town from incremental revenues and demands on services. *Same as above*
- Evaluate short and longer-term zoning methods available. *The AB met with town counsel to review existing zoning and better understand zoning options for shaping the future development of the site. This task will most likely be augmented by an outside zoning consultant and it is expected will include consideration of the application of a form-based code.*
- Review available traffic and transportation studies, including the Route 2 Corridor Study, and recommend other new studies if needed. *The AB has received and reviewed a memo from DOT regarding the status of planning for the Route 2 Corridor improvements. The AB will be meeting with DOT later this fall. The AB has reviewed the Envision Concord 2030 plan and West Concord Master Plan. In addition, the AB will review latest iteration of Concord’s Transportation Plan*
- Identify and recommend local stakeholders and community experts who can be considered for advancement to the next phase of the project, if applicable. *The AB has developed a comprehensive list of stakeholders for this project and will continue to refine this list as their work progresses and new committees emerge.*
- Provide quarterly, written reports to the Select Board. *The AB expects to issue its first quarterly report on September 13th, 2024*
- Recommend duties and membership if/when the Advisory Board’s charge expands. *The AB continues to monitor its effectiveness as it organizes itself for the endeavor.*

Respectfully submitted by, Dan Gainsboro & Patrick McCurdy

DRAFT



TOWN OF CONCORD
Office of the Town Manager
Town House
P.O. Box 535
Concord, Massachusetts 01742

To: MCI Concord Advisory Board

From: Shannon McAndrew, Management Specialist

Date: September 23, 2024

Re: Citizen Correspondence and Idea Tracking

As we know, DCAMM recently held its first Public Hearing regarding MCI Concord. Since the hearing, there seems to have been an uptick in citizen correspondence received by Advisory Board members. To make sure that all Board members are receiving correspondence intended for the full Board, I'd like to propose the following process:

- The Town set up a designated email address for the Advisory Board, which is MCIconcordBoard@concordma.gov.
 - o Firstly, encourage all community members to use this email address as the channel to communicate with the full Board, opposed to personal email addresses.
 - o Secondly, if community members email your personal email address with an email intended for the full Board, please forward the email to the designated MCIconcordBoard email address. This will allow for emails received for the full Board to be easily tracked by me (opposed to forwarding these directly to my personal Town email).
- The Advisory Board should decide how correspondence should be published with the community.
 - o Option 1: Correspondence is included at the end of each Advisory Board meeting packet.
 - I would propose in the Advisory Board packet, rather than subcommittee packets, in order to avoid duplicate work for myself.
 - o Option 2: Correspondence is posted in a packet on your webpage, in a similar manner to the Select Board correspondence. The Select Board correspondence webpage can be viewed [here](#), for reference.

The Advisory Board has also expressed interest in tracking community members' development ideas that are received through correspondence. I would be happy to do this in an Excel spreadsheet that periodically updated on your webpage, say once

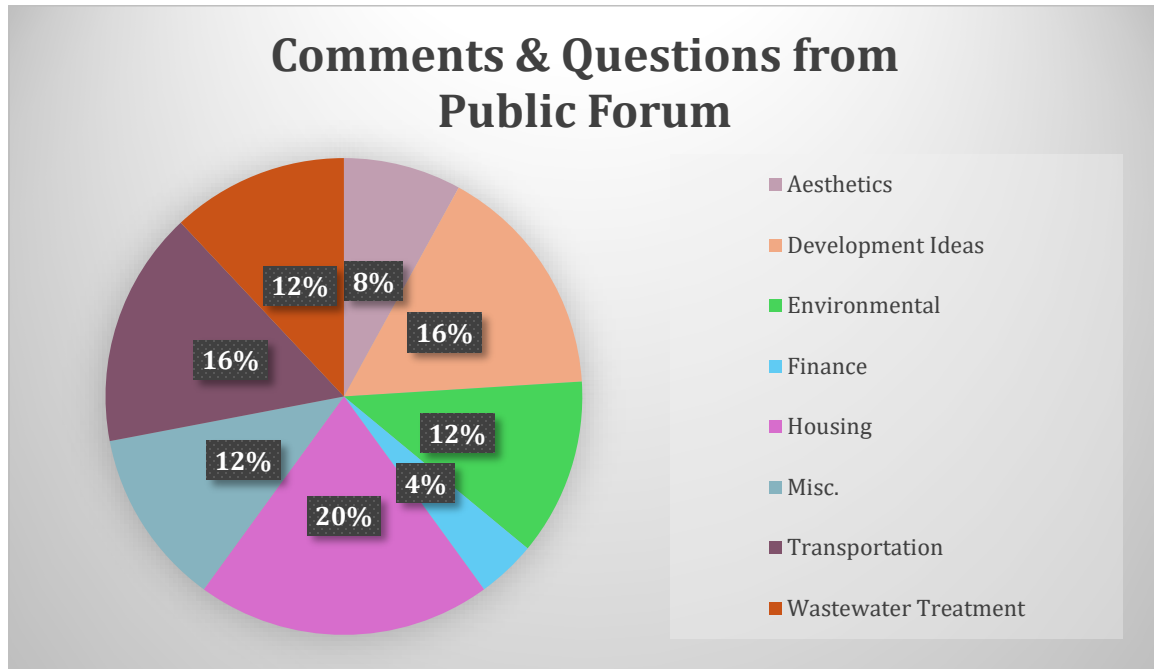
a month, depending on the level of correspondence being received at the time or to be more frequent by request of the Board. I would request that the Board determine the format of the spreadsheet, such as, do you want the ideas being tracked via category of idea, etc. Then, I am happy to get started.

Re: De-Briefing the DCAMM Public Hearing

As requested by the Advisory Board, I tracked questions and comments made during the Public Hearing by category. Categories were:

- Aesthetics/Intermediate Beautification
- Development Ideas
- Environmental/Sustainability
- Finance/Taxes
- Housing
- Miscellaneous
- Transportation
- Wastewater Treatment Facility

Here is a chart breakdown of the questions and comments made by these categories:



Here is a sampling of some of the comments received:

- Keep in mind the housing needs of older community members
- No big box development
- Keep scale and character of existing development
- Exciting opportunity for synergy with green space, West Concord, and varied transportation modes
- Connectivity with West Concord
- Consider light industrial development
- Multi-modal transportation area, focus beyond the Rt. rotary
- Extend outreach beyond Concord with respect to the regional impact
- Construct an underpass rather than a flyover, greenspace on top
- Incorporate the mission of the prison in some way; rehabilitation, mental health, and healing
- Open up tours of the prison to the community
- Incorporate the arts; ex. a mural on the walls
- Designate it a historic landmark to influence development restrictions
- Involve young people in the planning process
- Don't forget the prisoners who have been transferred to other facilities, there are still opportunities to be involved