

## ADMIN CAPACITY

# Best Practice Compendium

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Admin Capacity v1.2  
August 30, 2021





# Improve zoning, licensing, and permitting interactions






Provided by SME Consultant

BSC Group, Inc.

Location

Various locations - subject matter is about processes not a location-based project

Origin	Multiple municipalities – Examples are not site/community specific
Budget	 Low budget (Under \$50,000)
Timeframe	 Short term (Less than 5 years) – many achievable in days to weeks
Risk	 Low risk
Key Performance Indicators	Municipalities needed to modify permitting requirements/procedures to meet the needs of businesses who needed to change/modify business practices to respond to COVID and public health concerns and regulations. This included actions by municipalities to expedite permitting processes. Success is measured by tracking: the ease of filing and obtaining a permit; how quickly permits are issued; and the ratio of permits issued vs. permits denied.
Partners & Resources	Municipal Departments, Boards and Commissions such as: Planning Board, Zoning Board of Appeals, License Commission Health Department, Police, Fire, Department of Public Works (DPW) Business support organizations such as Chamber of Commerce, Business Improvement Districts (BID's)

## Diagnostic

The COVID-19 pandemic required municipalities to rapidly adapt their regulatory processes through an evolving public health crisis to help businesses survive. Though challenging, a crisis such as COVID presented communities and businesses with new opportunities for improved and streamlined operations.

When COVID-19 impacts reached Massachusetts in the spring of 2020, public health precautions quickly initiated a transition to less in-person contact for retail transactions. To adapt and remain in business, retailers sought approval for new actions such as: increased delivery service; short-term parking for take-out and curbside pickup; alcohol to go; and a transition from indoor to outdoor dining, fitness, shopping and recreational activities.

These changes required municipalities to consider new regulatory procedures, adaptation of prior regulations, and taking advantage of the state's relaxation of certain requirements. Throughout Massachusetts, municipalities and businesses met the COVID challenge by taking chances, being flexible, pivoting business models, and thinking creatively and "outside the box." Critical to the success was the transition to online permitting processes, permits and approvals for new approaches to deliver products/food to customers, leniency for outdoor eating and drinking, and other unique and creative solutions.

## Action Items

Municipalities worked to quickly adapt or modify rules and regulations to support the business community, knowing that time was of the essence. The following actions were proven to be successful. These actions were either initiated by municipalities or requested by business owners and then approved by municipalities.

- Waive time limits for permits to minimize the need to re-apply to continue an approved action
- Encourage Boards and Commissions to hold joint meetings to expedite and streamline certain permitting processes
- Improve municipal websites and outreach to businesses to explain current as well as changes to the regulatory framework
- Encourage Planning Boards to either grant the following or gave planning staff the ability to provide administrative approvals to relax certain zoning requirements such as :
  - Temporary or permanent reduction in parking requirements to provide additional outdoor dining and gathering in areas currently used for parking.
  - Relaxed signage requirements to allow temporary signs to promote outdoor sales and dining
- Establish procedures for police, fire and public works to easily review/approve requests to block-off on-street parking spaces or portions of streets to be used for outdoor dining/events
- Create requirements describing how to safely block-off portions of a roadway or on-street parking with rigid and visible barriers to allow them to be safely used by pedestrians/customers.
- Waive some permitting requirements and fast-track others for a more efficient permitting process to allow businesses to quickly take advantage of a more flexible regulatory framework.

## Process

### Promote associations who can speak for the greater good

- form new or strengthen existing business associations who speak for all the businesses in a commercial area to advocate for permitting and regulatory changes to benefit all businesses. This minimizes pitting the interests of one business versus another and provides a unified voice in promoting change.

### Make it easier for businesses to find the information they need

- Municipalities should consolidate all relevant business information in a single location on the municipality's website including permitting and regulatory items. Streamlined permitting and joint meetings of permitting boards is also encouraged to expedite permit requests.

### Propose that successful temporary regulations to become permanent

- Where permitting changes made to accommodate COVID have proven successful, municipalities should consider making temporary changes permanent.

### Roll-over permits

- Some municipalities who issued permits in 2020 for COVID related accommodations have agreed to allow those permits to "roll-over" to 2021 through a written request from the business, and therefore avoiding a full permit re-application.





# Zoning for a Resilient Downtown



Provided by SME Consultant      Levine Planning Strategies, LLC

Location      Burlington, VT

Origin	City of Burlington (VT) Office of City Planning
Budget	 High Budget – \$450,000 (HUD Sustainable Communities Challenge Grant)
Timeframe	 Medium Timeframe – 6 years (3 years' planning & 3 years to finalize code)
Risk	 Medium Risk – increased timeframe and cost helped reduce risk
Key Performance Indicators	Growth and survival of existing businesses; number of business expansions
Partners & Resources	Federal agencies; Community & Economic Development Office; Mayor's Office

## Diagnostic

Downtown businesses often need to adapt and change quickly. However, many local zoning codes make it difficult to quickly adjust business models. In many cities, use tables are many pages long, with many common uses requiring a discretionary review. Adding a new use or adding space to a business, even on a trial basis, can be difficult to do. In addition, changes may trigger increased parking requirements that cannot easily be met in a downtown setting. For these reasons, many downtown businesses are reluctant to change their model and potentially find a successful new strategy.

This problem predates COVID-19. However, in the wake of the pandemic, businesses had to adapt quickly, experiment, and be prepared to provide new uses to attract customers. In the short-term, many communities were flexible. Going forward, however, it's likely that many communities will return to reviewing changes in use or space. At the same time, research suggests that businesses need flexibility to succeed post-COVID-19.

Some communities have responded to this issue by reducing the number of uses in their zoning. Others have simply made it easier to add a new use on site or expand existing uses. Still others have looked to remove use limitations altogether in certain zones, focusing on goals outlined in local plans to guide decisions.

## Action Items

An important step to help businesses post-COVID is to think about zoning requirements as a small business might. What if a record store wanted to add a small bookstore in the back of their space? Would that be allowed? Would they have to somehow provide additional parking? Would it require a public process with the risk and cost of being denied? If so, communities should think about whether that is their goal. In some cases, it may make sense to keep zoning restrictions on certain uses. For example, drive thru restaurants often have negative externalities, especially in a downtown location. On the other hand, a walk-up window for pedestrians is likely to have few of those negative effects, and can help drive local businesses as visitors continue to be wary of going indoors. Once you have a sense of how your zoning affects business decisions, it would be advisable to check in with some local businesses to get their thoughts as well.

With that data in hand, communities can use their plans to guide how to change their zoning. A few small steps may make a big difference. These could include:

- Reducing or removing regulations on outdoor dining in zoning. Licensing and other municipal processes can usually suffice;
- Revising parking requirements for new uses downtown. Re-tenanting an existing space, or changing from one use to another, should not generally trigger any new parking requirements; and
- Streamlining the review process for changes in use. Either reduce the number of use groups in zoning so small changes don't trigger zoning review or allow more uses by right. If some public review is appropriate, rely on staff-level administrative review as much as possible.

## Process

Burlington's planning process began in earnest in 2010 when the city received a Sustainable Communities Challenge Grant from the U.S. Department of Housing & Urban Development. That grant made it possible to develop a plan for the downtown and waterfront, called "PlanBTV." The vision in that plan was then codified in a form-based code beginning in 2013. The new zoning reduced the number of uses downtown by 50%. More importantly, it made it easier for a business to modify their use category by significantly reducing the timeframe and risk to the business. Changes such as these are ongoing. Most recently, city planners have worked to update the definitions and uses for food and beverage uses to recognize the rise of new dining and drinking options.

Not every community needs to have as extensive a process as Burlington. Simply auditing the use table, streamlining the list of uses, and making it easier to change from one use to another, would be helpful for downtown businesses post-pandemic. That process could be done at a much lower cost and much more quickly.





*The Pine Street Enterprise District in Burlington (Credit above & cover: David White, FAICP, Burlington Office of City Planning)*





Image: Lenox, Marblehead, Methuen

# Develop or update the municipality’s sign code



**Provided by SME Consultant** Emily Keys Innes, AICP, LEED AP ND, Innes Associates Ltd.

**Location** Not Applicable

Origin	Innes Associates Ltd. on behalf of the Rapid Recovery Program sponsored by the Commonwealth of Massachusetts	
Budget	 Low (less than \$50,000)	 Medium (\$50,000-\$200,000)
Timeframe	 Short Term (1-5 years)	
Risk	 Medium	
Costs	<p>Costs will include the consultant's time and legal review by the municipality's counsel.</p> <p>The range for the consultant's time is between \$35,000-\$60,000, depending on the level of public engagement and how illustrative the code is. Review by municipal counsel may be covered by the municipal on-call agreement or may need to be added to the cost of the project.</p>	

## Potential Sources of Funding

In addition to municipal funds, the following are appropriate sources:

### American Rescue Plan Act (ARPA)

Assistance to small businesses includes loans, grants, in-kind assistance, technical assistance, or other services. These funds should cover assistance with the design of façade, storefront, or site improvements when tied to a specific impact of the COVID-19 pandemic. Creating or revising the sign code may be linked to a façade/storefront improvement program. Possible impacts are addressed in the sections on **Key Performance Indicators** and **Diagnostic**.

### Commonwealth of Massachusetts One Stop for Growth

*Massachusetts Downtown Initiative (project limit \$25,000)*

*Department of Housing and Community Development (DHCD)*

All communities are eligible to apply. Some of the funding for this program is reserved for non-entitlement Community Development Block Grant (CDBG) communities. MDI staff will assign a consultant to assist the community with the technical services, which would include developing the sign code. The MDI grant may be sufficient for the full project for a smaller community unless the community is looking for a more extensive set of illustrations or a significant public engagement process. A larger community may need additional funding.

*Community Planning Grants (project limit \$25,000-\$75,000)*

*Executive Office of Energy and Environmental Affairs*

A Community Planning Grant may be used for Zoning Review and Updates, which could include the sign code if it is part of the municipality's zoning bylaws or ordinance. All Massachusetts communities are eligible to apply for this grant.

### District Local Technical Assistance Grant

*Regional Planning Agencies (RPAs) and DHCD*

Funds for this program are allocated to the regional planning agencies. These funds may be used for planning projects. Each RPA has a different focus on how these funds may be used to meet the state's funding goals.

All municipalities are eligible to apply directly to their RPA. The RPA will work with the municipality on the program; a separate consultant is not usually required.

## Diagnostic

Updating a sign code and combining the update with financial assistance to small businesses to bring their signs into compliance can help address negative impacts from the COVID-19 pandemic. Signs are critical information to identify active businesses to customers. Outdated signs may suggest that a business is no longer in operation. Signs in disrepair may be dangerous or may contribute to a perception that a business area is not safe, discouraging potential customers.

Challenges across municipalities include the following:

Existing signage is outdated, inconsistent, or in disrepair.

The sign code is inconsistent with current best practices, new sign technology, or legal decisions related to signage regulations (ex. Reed v. Town of Gilbert).

The approval process is perceived as onerous and/or arbitrary, especially for a small business.

Enforcement has become an issue and/or sign permits are regularly approved with waivers.

Sign code decisions are regularly appealed.

### Risk: Explanation

The risk for this project is in part dependent on the form of government and whether the design guidelines will be an advisory document or incorporated into the zoning bylaw/ordinance as specific standards.

The highest risk would be a Town form of government in which the design guidelines become part of the zoning bylaws and municipal regulations have been controversial in the community.

In general, experienced developers and builders like the predictability of a clear set of design guidelines which is consistently applied by a municipality. Property owners with less development experience are likely to have more concerns.

A second risk category is creating a sign code that is too restrictive. This sends a negative message to those who are considering investing in the community. Guidelines for sign design that are too subjective send a similar negative message in that applicants cannot be certain as to how the guidelines will apply to them.

### Key Performance Indicators

Sign codes are important for several reasons:

- Visibility of businesses who wish to attract customers/clients.
- Pedestrian and vehicular safety (reduce distractions).
- Community aesthetics.
- Reduction in light pollution.

KPI for this project could include the following:

- Successful adoption of the new/updated code.
- Compliance of code with legal precedents.
- Implementation of streamlined process for approvals.
- Number of noncomplying/ nonconforming signs replaced.

If this project is accompanied by a façade/storefront improvement project, additional KPI related to the numbers of signs upgraded to meet the new code could be added. Without such a program, new applications will be dependent on changes in tenants or on enforcement of noncomplying/ nonconforming signs.

### Partners & Resources

- Municipal staff (planning and economic development, building and/or zoning inspector)
- Municipal boards (City Council/Board of Selectmen, Planning Board, Zoning Board of Appeals, Design Review Board, Economic Development Committee)
- Property/business owners
- Downtown organizations

## Action Item

Key actions include the following:

- Understand why the sign code should be created/updated/replaced. What are the areas of greatest concern?
- Decide whether this is a project that can be done in-house or requires a consultant with appropriate expertise.
- Decide which funding source is appropriate and, if the source is a grant program, apply for funds.
- If a consultant is deemed appropriate, go through the Commonwealth's procurement process (unless the grant program has an on-call consultant).
- Identify the people/organizations who need to be part of this process.
- Develop an engagement process appropriate for the municipality and the required approval process.
- Once the code has been approved, consider a public education program to inform people on a regular basis about the code and its implications. Key targets for this campaign include business and property owners and commercial real estate brokers.
- Consider aligning the enforcement process with the new regulations to ensure the effort leads to the anticipated improvements.

## Process

The timeframe will vary depending on whether the municipality has a city form of government or requires Town Meeting to approve bylaw changes. From the kick-off to entering the municipal approval process, the project should take 8-12 months.

- **Months 1-2:** Review existing code; develop sign inventory; interview municipal staff, boards with approval responsibility, former applicants, local land use lawyers, others with relevant experience and concerns.
- **Months 3-4:** Research appropriate precedents; develop public outreach/engagement program.
- **Months 5-7:** Engage with business/property owners and public on options and concerns; develop draft code; develop illustrations and decide whether illustrations are part of code or a separate document. Consider meetings with appropriate boards to introduce the draft code and receive feedback.
- **Months 8-9:** Revise the code to its final draft prior to the municipal approval process. Publicize the final draft prior to City Council/Town Meeting review and approval.



## Example 1: Sign Code Bylaw Study

Dedham, Massachusetts

**Town Contact**  
Jeremy Rosenberger  
Town Planner  
[jrosenberger@dedham-ma.gov](mailto:jrosenberger@dedham-ma.gov)

**Consultant**  
Innes Associates Ltd., Harriman, and  
Steven Cecil Design & Planning

**Cost**  
<\$50,000

**Status**  
Draft code will go to Town Meeting in  
Fall 2021.

### Characteristics

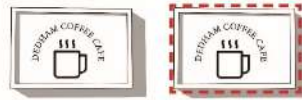
- Sign Code is part of the General Bylaws.
- Code is text-based and will be hosted on eCode
- Illustrations are in a separate document.

### Illustrations of Selected Sign Standards in the Dedham Signage Code

To assist in understanding some of the specific standards within the Dedham Signage Code, these illustrations indicate how typical circumstances may be applied. As illustrations, they are not intended to replace or alter the design standards or their interpretation; in every instance, the text of the Signage Code and its interpretation by the Town will govern reviews and approvals.

1. Calculating the Area of Individual Signs
2. Calculating the Maximum Area for Window Signs
3. Calculating the Maximum Sign Area Length of Proposed Facades along Streets
4. Calculating the Maximum Sign Area Length of Proposed Facades along Private Roads
5. Identifying and Using Sign Standards
6. Identifying Sign Area Standards
7. Identifying Sign Area Standards
8. Identifying Sign Area Standards

#### 1. CALCULATING THE AREA OF INDIVIDUAL SIGNS



For signs with borders or backing surface integral to the sign, the sign area is calculated by including them.

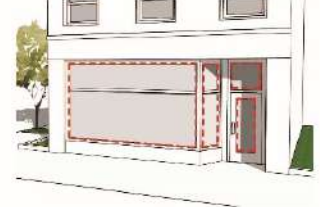
Dedham Coffee Cafe

For signs with individual letters, the calculation is based on an outline that encompasses them.



For complex sign shapes, the sign area is calculated by adding together the areas of simple geometries that encompass the sign, text and graphics.

#### 2. CALCULATING THE MAXIMUM AREA FOR WINDOW SIGNS



The maximum area of window signs may not exceed 25% of the total window and door glazing area of a business or establishment. The total window area is the sum of the glazing of the components of a storefront.

For any business or establishment and as part of this maximum sign area, one window sign may consist of a Digital Display Sign or Edge Lit Sign up to a maximum area of 2 square feet, or 1 Neon-Type Sign with a maximum area of 6 square feet.

*Courtesy of the Town of Dedham, Innes Associates, Harriman, and Steven Cecil Design & Planning*

## Example 2: Sign Regulations Update

Arlington, Massachusetts

**Town Contact**  
Jenny Raitt  
Director  
Department of Planning and Community  
Development  
[jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us)

**Consultant**  
Lisa Wise Consulting, San Luis Obispo, CA

**Cost**  
<\$50,000

**Status**  
Bylaw adopted by Town Meeting in 2019.

### Characteristics

- Sign Code is part of the Zoning Bylaws.
- Code is primarily text-based but includes illustrations.
- The Zoning Bylaws are provided in a stand-alone PDF.

**2-11. SIGNAGE**

(1) Standards for All Permanent Building-Mounted Sign Types. The following sign types are allowed, subject to the criteria listed under each sign type:

(1) Awnings Signs. Awnings signs must comply with the standards provided in the table below.

Standard	Requirements
Sign Area	1 sq. ft. of sign area per linear foot of awning width.
Mounting Height	Min. of 8 ft. from the bottom of the awning to the nearest ground level.
Sign Placement	Signs shall be placed on the ground or second floor of a building. Must not project above, below, or beyond the edge of the face of the building work or architectural elements on which it is located. Sign width shall not be greater than 50% of the width of the awning face or its attachment to the building.
Relocation from back of curb	None.
Notification	None. Unimpaired or Unimpaired under the awning.
Permitting	Sign permit required. See Section 6.2.2(A).

**End Notes:**  
If an awning is placed on multi-story fronts, each business is allowed signage no greater than 50% of the width of the storefront.

(2) Bracket Sign. Bracket signs must comply with the standards provided in the table below.

Standard	Requirements
Number of Signs	Max. 1 per business.
Sign Area	Max. 12 sq. ft.
Mounting Height	Min. of 8 ft. from the bottom of the sign to the nearest ground level.
Sign Placement	Must be mounted perpendicular to the building face or corner of the building. If mounted below the awning of a building or overhanging structure, must not extend beyond the edge of the structure on which it is located. Max. 5 feet from the building facade.
Sign Projection	None. Unimpaired or Unimpaired under the awning.
Notification	None. Unimpaired or Unimpaired under the awning.
Permitting	Sign permit required. See Section 6.2.2(A).

**End Notes:**  
If an awning is placed on multi-story fronts, each business is allowed signage no greater than 50% of the width of the storefront.

**Town of Arlington Zoning Bylaw**

*Courtesy of the Town of Arlington and Lisa Wise Consulting*

### Example 3: Sign Audit & Recommendations Report

Portland, Maine

#### City Contact

Christine Grimando, AICP  
Director, Planning & Urban  
Development Department  
[cdg@portlandmaine.gov](mailto:cdg@portlandmaine.gov)

#### Consultant

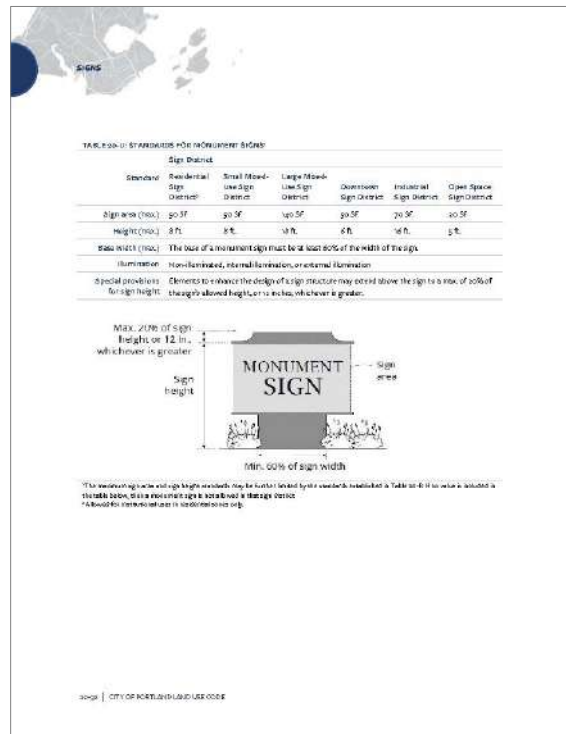
ReCode and Lisa Wise Consulting,  
Inc.

#### Cost

\$50,000

#### Characteristics

- Sign Code is part of the Zoning Bylaws.
- Code is primarily text-based but includes illustrations.
- The Zoning Bylaws are provided in a stand-alone PDF.



*Courtesy of the Town of Dedham and Gamble Associates*

### Selected Resources

Signage Foundation, Inc. ([the.signagefoundation.org](http://the.signagefoundation.org)) has a great research library of articles. Some of the links are broken, but you may be able to search for the articles on another search engine.

These non-Massachusetts model sign codes are helpful but should be reviewed by municipal counsel first to make sure the provisions are compatible with Massachusetts General Laws.

- The Pennsylvania chapter of the APA has a model sign code. The current link is <https://planningpa.org/wp-content/uploads/Model-Sign-Plan-2.pdf>
- Also in Pennsylvania is the Model Sign Ordinance from the Montgomery County Planning Commission (Pennsylvania), 2014. The current link is <http://www.montcopa.org/DocumentCenter/View/7070>
- Scenic Michigan produced the Michigan Sign Guidebook: The Local Planning and Regulation of Signs. The second edition, published in 2021, is available here: <https://scenicmichigan.org/sign-regulation-guidebook/>



# Strategy Guide for Activating Public Spaces






Provided by SME Consultant

Central Massachusetts Regional Planning Commission

Location

Worcester, MA

Origin	CMRPC
Budget	 Medium
Timeframe	 Medium Term
Risk	 Medium Risk
Key Performance Indicators	Communities will have realistic action plan for easily permitting commercial and community activity on a range of public spaces
Partners & Resources	Regional Planning Agency, Municipal Planning Boards and Staff

## Action Items

### 1.0 Background and Baseline Research

- 1.1 Inventory of public spaces (public and private): Identify the location and basic characteristics of all public spaces within the study area, including access, ownership and suitability for public activities
- 1.2 Inventory of existing permitted activities and processes : Review all processes for issuing of permits for public and privately organized events within public spaces
- 1.3 Stakeholder Identification and Outreach: Identify and solicit feedback from organizations, companies and individuals that have in the past held public events or showed interest in holding public events within the town or study area
- 1.4 SWOT Analysis : Analyze potential opportunities and challenges around utilization of public spaces
- 1.5 Case Studies and Resources: Research similar communities in the state and region and create a catalogue of realistic, achievable activities

### 2.0 Community Input

- 2.1 Municipal Listening Session(s): Solicit feedback on existing processes, paying special attention to what has worked, where friction points may be
- 2.2 Community / Stakeholder Listening Session(s): Solicit feedback from community stakeholders on opportunities and challenges
- 2.3 Summary of Community Feedback: Summarize all community feedback and develop recommendations for reducing friction points

### 3.0 Strategy Guide Development and Review

- 3.1 Summary and analysis of existing processes
- 3.2 Opportunities and Challenges
- 3.3 Case Studies
- 3.4 Recommendations for streamlining the permitting process
- 3.5 Review all recommendations with municipality and incorporate recommended edits

## Process

1. Outreach and background research
2. Develop draft materials and visuals
3. Municipal review and revision





# Shared Streets - Peer Exchange







Provided by SME Consultant

Metropolitan Area Planning Council

Location

Virtual

Origin	Cities and towns across the Commonwealth
Budget	 Low - Budget
Timeframe	 Short-term (3-9 months)
Risk	  Low – Medium Risk
Key Performance Indicators	Number of participants, evaluation and data captured
Partners & Resources	Funding from Massachusetts Department of Transportation; Partners included local business associations; resident groups; artists; DPW, Fire, Transportation Department

## Diagnostic

The MassDOT Shared Streets and Spaces Program was established in June 2020 in response to the COVID-19 public health crisis with the goal of helping Massachusetts cities and towns adopt quick-/launch quick-build projects that would support public health, safe mobility, and renewed commerce in their communities. The program was relaunched in November 2020 with a focus of addressing winter-related challenges. Since its inception, the program has awarded a total of \$26.4 million dollars to 161 municipalities and four transit authorities to implement 232 projects. Grant-funded projects have ranged from dedicated bus and bike lanes to seasonal parklets, road diets, safer crosswalks, and new bike share stations.

## Action Item

In January 2021, the Metropolitan Area Planning Council in partnership with MassDOT and the Solomon Foundation hosted a peer exchange for the grant recipients of the first round of funding. The goal of the exchange was for communities who had successfully implemented projects to come together and share lessons, challenges and successes across their work. 65 people attended the peer exchange itself, with municipal staff, engineers, public utilities, elected officials, nonprofits representing 57 communities from across the Commonwealth.

## Process

In order to host similar spaces of peer learning, special attention should be paid to recruiting a group of diverse communities that represent different:

- Project types (outdoor dining, temporary sidewalks, bike lanes, bus lanes)
- Project locations (suburban, urban, rural)
- Scale of projects (small, medium, large)

Peer exchanges should be held in a neutral space and light facilitation provided for small group discussions to occur. We recommend that group discussions are divided by topics of interest which can be determined through the registration process (i.e. asking "what topics on your shared street project would you like to discuss").

Following the peer exchange, a brief summary of highlights and lessons learned should be produced by the organizers to distribute to participants.

## Shared Streets Peer Exchange Summary and highlights

The following was the summary produced from the January 2021 peer exchange where participants shared their experience with the **process** of planning to implementation of shared streets projects within their communities.

- **Shared Streets Peer Exchange Summary and highlights**
- *How has your project impacted or changed your community's streets?*
- **Initial hesitation paved the way for later enthusiasm**
- Less pushback than anticipated once projects implemented.
- Pilot projects showed what is possible short- and long-term.
- Great opportunity to engage the local business community.
- Community feedback on projects identified areas for future projects
- **Visibility has played important role for permanence**
- Visible projects allowed people to see the change that could take place.
- Communities reported traffic has slowed or calmed.
- Some reported more kids walking or biking to school, and people using the bike lanes to commute to work.
- **Projects addressed the need of local businesses**
- Creative solutions to parking.
- Outdoor dining and retail was lifeline for businesses in the summer and fall.
- Success could bring regulatory change in future, such as expedited permitting.
- Challenge of snow removal and winter maintenance addressed by relocating street furniture to public facilities
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## Shared Streets Peer Exchange Summary and highlights

### Shared Streets - Peer Exchange Summary and highlights

#### *What was challenging or went well from planning to implementation?*

##### Solicit project support for long-term success

- Pitch as “pilot” and demonstrate economic benefits
- Coordinate with business owners through social media, focus group, WhatsApp, texting
- Supportive residents can help get the word out
- Outreach to older adult communities can be challenging – important to engage senior centers, etc.

##### Look into existing projects for new ideas

- Success in identifying projects through plans and wish lists of existing projects.

##### Plan for expenses

- Plan for unanticipated expenses in collaboration with business associations, community groups, and others.

##### Keep up to code with implementation (ADA, etc.)

- Critical to ensure compliance with ADA regulations, which requires creativity.

##### Consider cross-departmental coordination

- Working with DPW, Fire and Police Departments early on is critical.
- Important to keep everyone on the same page for maintenance and storage.
- Consider waiving permits and fees.

##### Plan for procurement

- Procuring materials on time is challenging – plan in advance, if possible.
- Important to communicate expectations and follow-up for future projects.
- Some communities worked with local nonprofits for procurement – made process smoother.





*Belmont Shared Streets – Outdoor dining*  
*Photo credit: MAPC*



*Town Center shared space in West Stockbridge*  
*Photo credit: Erin Clark*



*Outdoor dining in Salem with painted concrete barriers*  
*Photo credit: City of Salem, MA*



*Shared safe outdoor dining space in Norwood*  
*Photo credit: Town of Norwood, MA*



*Outdoor dining in Plymouth with planters to buffer pedestrian crossing*  
*Photo credit: Jerry Kelleher*



*A snowy parklet in Melrose Town Center*  
*Photo credit: Melrose Pedestrian and Bicyclist Committee*





Outdoor dining and commerce in Moody Street in Waltham  
Photo credit: Martha Creedon



Hay bales/pumpkin-festooned crosswalks in Topsfield  
Photo Credit: Town of Topsfield, MA



Cummins Highway Boston quick build protected bike lane  
Photo credit: Liveable Streets Alliance



Watertown Pedestrian Walkway  
Photo credit: Erin Clark



Outdoor dining and painted concrete barriers in Amherst  
Photo credit: Erin Clark



Public parklet in Wellesley  
Photo credit: Town of Wellesley






La Santa Tacos and Tequila [photo by Jeff Owen, NMCOG]

# Tyngsborough: Expedite License Modifications for Outdoor Dining



Provided by SME Consultant      Northern Middlesex Council of Governments

Location      Tyngsborough, MA

Origin	Baker-Polito Administration, ABCC, and Tyngsborough Board of Selectmen
Budget	 Low- Applications do not require a fee. Municipal staff time is required for processing, review and inspections.
Timeframe	 Short-term – Less than 1 week for the community to revise procedures, notify establishments and receive applications, plus up to 1 week to review and approve applications
Risk	 Low – Potential lack of political will; opposition from abutters or neighborhood; noise levels, especially late evening
Key Performance Indicators	Modifications to licensed premises permitting the service of alcohol in a designated outdoor area allowed restaurants to increase their revenue stream. Indicators could include the number of license modifications approved, number of customers served, sales, and the change in visitors to the district. Cooperation of the establishments would be required.
Partners & Resources	Local Licensing Authority (e.g. Board of Selectmen); municipal departments responsible for the review of the applications and required inspections, e.g. Fire Department, Building Inspector



## Diagnostic

The process for obtaining a modification to a victualler (restaurant) license or a license to serve alcohol for on-premise consumption typically requires 60 days.

Due to emergency health restrictions imposed early on in the COVID-19 pandemic, restaurants were not allowed to provide indoor sit-down service, greatly impacting their revenues. Furthermore, restaurants that did not already have a license that allowed for outdoor service needed a seek a license modification and demonstrate their ability to comply with COVID-19 health and safety requirements. Without a streamlined process in place, the license modification process would typically take up to two months, jeopardizing the survival of many restaurants that were already struggling.

## Action Items

In June 2020, the Massachusetts Alcoholic Beverages Control Commission (ABCC) notified Local Licensing Authorities that due to the impacts of the COVID-19 pandemic, and in accordance with the Reopening Massachusetts Plan issued by Governor Baker, local authorities could streamline applications for temporary modifications to licenses for serving alcohol on premise.

In Tyngsborough, holders of licenses for on premise liquor consumption applied to the Board of Selectmen for a temporary modification of their premises to include a designated area outside. The application did not need to be reviewed during a duly posted public hearing, the selectmen did not need to advertise the hearing in a local newspaper and did not need to notify abutters. Additionally, the selectmen did not need to get ABCC approval prior to issuing the temporary modification. This changed the process of getting a modification from 60 days to a week.

The Board of Selectmen utilized this same application process to consider modifications to Common Victualler Licenses, which are the license required to serve food in Tyngsborough. If a business possessed both types of licenses, they were able to apply for both modifications with a single application.



*Top Photo: Dream Diner Outdoor Seating (photo credit: www.dreamdiner.com)*



*Center Photo: Dream Diner Tent with Outdoor Seating (photo by Jeff Owen, NMC06)*



*Bottom Photo: Cazadores Restaurante Mexicano Tent with Outdoor Seating (photo by Jeff Owen, NMC06)*



## Action Items (continued)

In order to accommodate license modification requests in time for Phase II reopening of outdoor service at restaurants, Tyngsborough's Board of Selectmen (the Local Licensing Authority) notified holders of Common Victualler Licenses and on premise liquor licenses of the streamlined license modifications within days of the State's announcement.

Fourteen applications were received in Tyngsborough, including eight restaurants located along Middlesex Road, the town's primary commercial corridor and an area described locally as "restaurant row". Every application was approved within one week. Unlike locations within some downtown areas, outdoor dining accommodation could be addressed on-site in this suburban setting.

## Process

- Local Licensing Authority (e.g. the Board of Selectmen) amends temporary license modification process.
- Licensing Agent sends a notice to all Common Victualler and Section 12 Liquor License holders informing them of the opportunity to modify their licenses.
- Applications are reviewed by all relevant departments to ensure that plans adhere to all relevant local, state, and federal building codes, public safety orders, and health guidelines.
- Prior to opening, business are required to be in compliance with both the general business and industry specific standards released by the Commonwealth, including maintaining a COVID-19 control plan template, posting a compliance attestation poster visible to patrons and other visitors, and additional signage to describe the rules for maintaining social distancing, hygiene protocols, and cleaning.
- An onsite inspection is performed prior to commencing outdoor service.
- Tyngsborough imposed the following additional limitations:
  1. The outdoor area must be roped off, fenced off, or blocked off by other means.
  2. Installation of a tent was permitted with inspection by the Tyngsborough Fire Department but tents must be open aired, meaning only a roof. No tents with side walls were permitted.
  3. All tables must be 6 feet apart.
  4. No parties of larger than 6 people were permitted.
  5. All employees must wear masks at all times.
  6. Patrons are required to wear masks except for when seated at their own table.

# Streamlining Special Event Permitting



Provided by SME Consultant

Pioneer Valley Planning Commission

Location

Osceola County, Florida

Origin	Massachusetts Association of Regional Planning Agencies, Osceola County (FL) Board of County Commissioners Community Development Department
Budget	 Low-cost, municipal staff engagement
Timeframe	 Short-term, may require changes to municipal review processes
Risk	 Low risk
Key Performance Indicators	Number of permits reviewed and issued, length of permitting and approval process
Partners & Resources	Municipal departments, to include, but not limited to Planning, Police, Fire, Building, DPW, and Health, and Town/City Administration; DLTA funding to assess permitting
Diagnostic	<p>The COVID pandemic has unleashed creativity and permissiveness in municipal special events permitting that cities and towns want to hold onto as society opens up. Elements to be retained include easing the burden of applying for permits and making sure costs reflect the amount of effort necessary to process the permits and do not result in inequitable access by different groups.</p> <p>More efficient and easier permitting processes can lead to quicker turn-around and peace of mind for those organizing these events for the community. Streamlining event permitting can help agencies organizing events to use their resources more efficiently and will result in better events when permitted on a singular parcel as zoning dictates.</p> <p>The following example is a regulatory process taken from Osceola County in Florida that employs best practices for special event permitting: a central repository for application with the ability to submit electronically and follow the permit review process via electronic permitting. Review processes are done transparently and discussed at routinely scheduled meetings in conformance with the local government's regulatory codes.</p>

## Action Item

In order to streamline your permitting process, the municipality should review its permitting powers: who reviews and approves, how much does the permit cost, is there an appeal procedure, etc.

The following Best Practices can be used to improve communication between stakeholders and the community about the local permitting process for special events. For this best practice, the Osceola County Board of County Commissioners utilizes these techniques to ensure an expedient, open permitting process for their special events.

- Single Point of Contact
- Users' Guide to Permitting with Permitting Flow Charts & Checklists
- Clear Submittal Requirements
- Concurrent Applications
- Combined Public Hearings, if needed
- Pre-Application Process
- Development Review Committee (DRC)
- Regularly scheduled inter-departmental meetings
- Physical proximity of professional staff to review

These best practices apply to streamlining special event applications that are allowed in specific areas of a community. In most cases, the zoning district would dictate the type of uses allowed in a community. This particular example permits special events as a type of use in commercially zoned areas and have a limitation of occurrences per calendar year.

## Process

As listed above, streamlined permitting can be realized if a municipality explores the concepts below. Not only has COVID maybe expedited these processes, but it has likely created a more permanent change in the ways municipalities interact with special events.


1. Single Point of Contact. The Community Development Department was the repository for the initial application and would determine if requirements were met leading to the scheduling of a Development Review Committee Meeting.
2. Users' Guide to Permitting and Permitting Flow Charts and Checklists. If a community already has a product like this, the process for permitting for special events can be incorporated into the existing guide. As the government provided an electronic permitting system, following the flow of the permit was easy for the applicant to see what either was missing or if a staff review had occurred.
3. Clear Submittal Requirements. Special event permit applications required documented permission from the property owner, site plan, photos, proof of insurance, and a narrative description of the event. Other documents would be required if necessary.
4. Concurrent Applications. Other required application permits, and their approvals, would need to be furnished as part of the permit approval process. The communication internally would be to ensure those permit approvals were occurring with the County Health Department or Public Safety, if necessary.
5. Combined Public Hearings, if needed. This was not a likely occurrence due to the local regulation, however, concurrent approvals would occur at a designated meeting of the local Development Review Committee.
6. Pre-Application Process. The point of contact for the process was the specific department staff person who would be able to address outstanding issues and questions regarding the permit requirements.

## Process (Continued)

Development Review Committee. The administrative approval of the DRC would occur either through a consent agenda or if pulled to be addressed publicly. The DRC included DPW, Buildings, and Planning/Zoning. The Departments of Public Safety and Health and the School District are often attendees at these meetings.

Regularly scheduled inter-departmental meetings. These meetings kept the issues of the specific special event permit in the County's pipeline of coordinated reviews.

Physical proximity of professional staff to review. The County Administration Building housed all departments. The housing of all departments in the building allowed for a One-Stop shop of sorts. Like with other permitting, increased the ability of interdepartmental staff communications with applicants and each other.

	<h3 style="text-align: center;">Osceola County Special Event Application</h3> <p>Osceola County Board of County Commissioners Community Development Department 1 Courthouse Square, Suite 1400 Kissimmee, FL 34741 Phone: (407)742-0200 Specialpermits@osceola.org</p> <p style="text-align: right;">Application No.: _____ Date Received: _____</p>
<p><b><u>Submittal Checklist</u></b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Property Owner Authorization</li> <li><input type="checkbox"/> Proof of Ownership</li> <li><input type="checkbox"/> Legal Description</li> <li><input checked="" type="checkbox"/> Narrative describing the event in detail. Including:             <ul style="list-style-type: none"> <li>• Sounds which will project beyond the property lines.</li> <li>• Vehicular Traffic and parking</li> </ul> </li> <li><input checked="" type="checkbox"/> Site plan showing:             <ul style="list-style-type: none"> <li>• Lot Dimensions,</li> <li>• Location of Special Event (with all details of set-up), Setbacks of set-up from property and right-of-way lines, Driveways, identifying parking and access, roads, tents, signs, portable toilets, and any other structures and setbacks from property lines and any other existing site improvements</li> </ul> </li> <li><input type="checkbox"/> Application Fees \$620.00</li> </ul>	<p>In accordance with Chapter 3, Article 3.8, Section 3.8.1.O of the Osceola County Land Development Code, authorization for a Special Event is issued to:</p> <p><b><u>Applicant</u></b></p> <p>Name: _____</p> <p>Agent/Lessee: _____ Tax ID# _____</p> <p>Address: _____</p> <p>Email: _____ Phone: _____</p> <p><b><u>Event Details</u></b></p> <p>Address of Event: _____</p> <p>Parcel Number: _____</p> <p>Dates of Event: _____ Hours: _____</p> <p>Event on County property? Yes ( <input type="checkbox"/> ) No ( <input type="checkbox"/> ) If yes provide liability Insurance. The insurance shall have a limit not less than \$1 million per occurrence for the general aggregate.</p> <p>_____</p> <p><b>Details of Event:</b> (a narrative may be attached to describe the event in detail.)</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>

*An application like this existed both as a fillable paper version and electronically at the county's permitting website.*

# Permitting Pop-Up Events



Provided by SME Consultant

Pioneer Valley Planning Commission

Location

Fort Worth, TX; Austin, TX; Burlington, VT

Origin	Fort Worth, TX; Austin, TX; Burlington, VT
Budget	 Medium cost, municipal staff participation/training and possible investment in permitting software
Timeframe	 Medium-term, will require changes to municipal review processes
Risk	 Low Risk
Key Performance Indicators	Number of permits reviewed and issued, length of permitting and approval process, collaborator level of satisfaction
Partners & Resources	Municipal departments, to include, but not limited to Planning, Police, Fire, Building, DPW, and Health, and Town/City Administration; DLTA funding to assess permitting
Diagnostic	<p>As downtowns emerge from the pandemic partners, collaborators and business improvement districts are eager to plan and hold pop-up (time-limited and purposefully impermanent) events, such as a pancake breakfast, to bring people back to these vital retail and commercial centers. In Springfield MA both the city and collaborators have been frustrated by the city's event permitting process and are eager to seize this moment to improve the process. Issues identified include: lack of an on-line event permitting process; requirement to pay fees using cash; necessity to make in-person visits to multiple city offices; time required, and confusion about the materials required to make the request. Springfield is in the midst of addressing this issue; <a href="#">Fort Worth TX</a>, <a href="#">Austin TX</a> and Burlington VT are Best Practice sites as they have implemented on-line relatively easy to navigate event permitting processes. Fort Worth has a robust on-line event permitting system that includes a downloadable manual as well as numerous topic specific PDFs and a phone number to call with questions and/or for additional information. Austin TX has created the Austin Center for Events, an interdisciplinary team to assist applicants through the event permitting process, and Burlington VT produced an <a href="#">exemplary manual</a> in 2018 that is referenced by most cities working on this issue.</p> <p>More efficient and easier permitting processes can lead to quicker turn-around and peace of mind for those organizing these events for the community and will increase the likelihood of such events happening and bringing people back to our city and town centers and other commercial districts. Implementing on-line permitting for local government is an appropriate and approved use of COVID recovery funds from the federal government so it is timely to advance this best practice.</p>



## Action Plan

Permitting a pop-up event efficiently requires municipal staff to differentiate permitting processes for permanent versus impermanent events. An important pre-requisite for a user-friendly efficient pop-up permitting process is a user-friendly municipal website. Making sure your municipal website is easy to navigate and includes a "How do I..." option is recommended because many applicants will come to the municipality not knowing where to start. Ideally the municipality will accept pop-up event applications electronically, and this may require new software, staff training, and updates to the existing municipal permitting processes; additional best practices are to identify a municipal staff person charged with helping applicants to navigate the process and including a flow chart or other visual display of the process. In Burlington VT the event permitting process is facilitated by an Associate Planner in the Planning Department but the approvals and permits are granted by the Department of Public Works (DPW), the entity responsible for streets and rights of way-the location where most events happen. In Fort Worth TX they have an Outdoor Events Manager to facilitate the process and they differentiate between neighborhood events (that require a one-page form) and larger city-wide events that require a 6 page form).

Just as many cities and towns have a Development Review Committee, made of municipal staff representing the departments that need to sign off on new developments (DPW, Planning, Building, Police, Fire, Health, Legal, Licensing), it is recommended that municipalities form a comparable pop-up event review committee. In Springfield this group is called the "Events and Festival Committee". Applicants visit this committee to propose pop-up events and receive preliminary approval, and then have to visit all the participating departments to receive their separate approvals. Stream-lining this process to move from paper to an electronic application would enable the Events & Festivals committee to forward their preliminary approval to all the relevant municipal departments clearly stating any necessary supplemental information required from the applicant. The applicant provides the necessary information electronically and the permit is issued.

Pop-up event applications can be simplified, but by their very nature are not simple and it may make sense to explain this to potential applicants. Applicants will need to explain where the event is taking place, provide a site plan, proof of insurance, and an operations plan. Fort Worth TX provides sample traffic plans and sample site plans as part of the application process on their outdoor events webpage.



## Office of Outdoor Events

Any outdoor gathering on public or private property that attracts more than 500 attendees, requires a street to be closed, sells food or beverages, or uses tents, stages, bleachers, fireworks, open flames or portable toilets requires a city permit. The rules also apply to parades, neighborhood events requiring the use of city streets, events in parks and some First Amendment activity.

Events conducted entirely on the property of a church, educational institution, college or university campus, or on property containing an occupied residence are exempt. Also, events per contracts with the City or at City-owned facilities and at the Texas Motor Speedway are exempt.

Event organizers are required to apply to the city within a lead time based on event size and purpose in order to obtain approval, be placed on the city's Event Calendar, attend the Pre-Event Committee Meeting and provide notice to surrounding property owners. Two committees are in charge of scheduling events, reviewing event plans and applications. The Event Calendar Committee includes city staff and representatives from Sundance Square, Downtown Fort Worth Inc., the Cultural District, Fort Worth South, the Chambers of Commerce and the Stockyards. The Pre-Event Committee includes city staff and representatives from Trinity Metro, the Texas Alcoholic Beverage Commission and various stakeholders. A designated employee from the City's Public Events Department will serve as special events manager to coordinate the process.

Please carefully read the guidelines below for **document submission deadlines** specifically for Neighborhood Events and Parades, Large Outdoor Events and Parades, and First Amendment activity.



### Contact Us

**Location**  
Fort Worth

### Ordinance

- [View the ordinance »](#)
- [View the latest updates »](#)

(PDF, 86KB)

### Other

View information on Fort Worth street classifications in the [Master Thoroughfare Plan](#).

**Staff Contact:**  
Cynthia Alexander, Outdoor Events  
Manager  
817-392-7894

*Office of Outdoor Events, City of Fort Worth, TX*  
<https://www.fortworthtexas.gov/departments/public-events/outdoor-events>

## Process

Permitting a Pop-Up event efficiently requires municipal staff (especially decision-makers) to believe in the importance and utility of pop-up events. Municipalities need a pop-up event champion(s) to secure the necessary human and financial resources to make these processes work efficiently and effectively. Consider reaching out to your BID or any existing business support organization if you are experiencing push-back from CEOs or other decision-makers. Investing in an on-line permitting software package and related training and web-site updates and refinements is the ideal process for facilitating pop-up events for larger municipalities hoping to host numerous events annually. Fort Worth TX is using Accela for their on-line permitting. The pandemic has taught cities and towns around the country that we do not need as much paper and in-person contact as we used to think we did and that we can conduct work on-line safely, securely and efficiently. Moving to on-line applications has increased employee safety, customer satisfaction and will facilitate pop-up events.

As identified in the Action Plan, the process to make pop-up event permitting more efficient is:

1. Assess your current situation: are your collaborators and affected municipal staff happy with the existing process? Identify 'pain points' and start improving there. Who makes decisions and why? Who is missing? And what can you learn from COVID innovations that can become permanent?
2. User-friendly municipal website. Fort Worth, TX, designed their page to have a landing page where you could easily find the documents and requirements of what was needed for special events. Additionally, a citation and link to the city ordinance is presented which establishes the justification for the requirements to follow.
3. On-line and/or e-permitting software. At a minimum accept applications via email, and consider investing in e-permitting software, especially after the pandemic as such investments by municipal government are an approved use of federal COVID recovery funds. Accela permitting software is being used in Fort Worth to process pop-up event applications.
4. Identify and publicize a Pop-up event coordinator. A municipal staff person or department needs to be identified as the primary contact for pop-up permits. The staff person assists the applicant with ensuring the review process is comprehensible and efficient and that all the requirements of the application are met. In Burlington, VT, the Associate Planner in the Planning Department is the facilitator of the application and process. In Fort Worth, the Office of Outdoor Events has a staff contact, an Outdoor Events Manager, who is tasked with facilitating the process of review and determining whether an application is for neighborhood events or larger city-wide events, which is determined in accordance with their City Ordinance.
5. Create a Manual that describes the process and publicize it widely and regularly. All three example cities have developed beautiful, easy to follow manuals that not only explain the local permitting process but also help applicants differentiate between the kinds of pop-up events possible and how to design and implement effective ones.
6. Provide sample documents. Fort Worth requires a site plan and offers a sample version on the permit website to make it easier for applicants to understand what is needed.

## Process (Continued)

7. Create a pop-up event permitting review committee comprised of the municipal staff representing departments that need to approve the permits: Streets (DPW), law enforcement and public safety, Insurance (Legal), Parks or Schools if not on the streets, and others as appropriate to your situation.

For municipalities not yet ready to move to an on-line permitting process, it is recommended that you mimic the effectiveness of on-line permitting in real life by forming a pop-up event review committee, similar to a Development Review Committee, with very clear guidance on all information required of applicants to host a pop-up event and commit to requiring no more than two meetings with the applicant: one for preliminary approval and the second to receive any information missing from the first visit. Each department that needs to sign off should delegate a pop-up event staff person and a back-up. Fees should be able to be paid using credit cards or other on-line payment methods.

Some additional resources utilized for this document and will be used to explore further recommendations for permitting pop-up events can be found here:

Delaware Valley Regional Planning Commission produced a Toolkit on "The Pop-Up Economy" that explains three different kinds of pop-up events: shops, events and planning, emphasizing the temporary nature of pop-up events and how cities and towns can more easily facilitate such happenings.

<https://www.dvrpc.org/reports/MIT026.pdf>



# Determining a District Management Model for Downtown Reading



Provided by SME Consultant

Ann McFarland Burke , Downtown Consultant

Location

Reading, MA

Origin	Town of Reading, MA
Budget	<div></div> <div>A Massachusetts Downtown Initiative grant provided Technical Assistance. The Town provided staff support and early coordination.</div>
Timeframe	<div></div> <div>The process took approximately 18 months. This timeframe was expanded due to the pandemic and extensive community education undertaken as part of the process.</div>
Risk	<div></div> <div>Political , property owner, tenant and other stakeholder consensus for preferred organization model is required to successfully establish a downtown organization</div>
Key Performance Indicators	Establishment of a sustainable downtown organizations with a real defined program , sustainability model and appropriate staff support.
Partners & Resources	Town of Reading, downtown advisory and steering committee and other downtown stakeholders



## Diagnostic

The creation of a downtown management organization was intended to establish a dedicated organization that would provide supplemental programs, services and advocacy for the downtown. The downtown organization would undertake activities to attract businesses, investment, customers and residents to downtown. These could include marketing, placemaking, business development and advocacy.

Determining the appropriate downtown management organization model was a unique process for the Reading community, downtown property owners and businesses. The process included extensive outreach and community education to explore program priorities, financial sustainability, organizational models and champions from both the private and public sector.

## Action Item

Economic Development Plans for downtown Reading had included the recommendation to establish a sustainable downtown organization to support the economic and social health of the downtown. The Town of Reading spearheaded activity to launch the process of community and property owner engagement to explore what model would be appropriate for downtown Reading. This included:

- Identification of staff and financial resources
- Creating a Community Outreach and Engagement Strategy
- Research to identify community priorities / recommendations
- Peer learning from other communities
- Consensus building among stakeholders
- Transition of leadership to private sector

## Process

- The Town of Reading secured Massachusetts Downtown Initiative Technical Assistance funding and committed staff to initiate and support
- A large broad-based community advisory/working group was formed to provide input and feedback
- A survey was widely distributed to community residents, businesses and other stakeholders - 1600 responses were received providing insight into program priorities and community preferences

## Process (Continued)

- **Community Outreach Event** - A Pizza/ Ice Cream Social brought over 150 residents to provide input
- **3 Community Forums** – Panels featuring executive directors of different types of downtown organizations described their programs, challenges and models.
- **Working sessions with Advisory committee** to discuss specific model alternatives / cost and benefits
- **One on one conversations** with key stakeholders
- **Consensus building** with stakeholders and recommendation of preferred model and next steps.
- **Transition from city led effort to Steering committee** comprised of property owners, businesses, and other stakeholders to lead organizational effort. City staff continued staff support. TA support continued through additional MDI grant.
- **BID Steering Committee.** BID organizational process underway

Town of Reading Sponsored Pop-Up Event

*ReImagine Reading*  
*Pizza and Ice Cream Social*



**September 18th from 6 pm to 8pm**  
**Pleasant Street Center**  
**49 Pleasant Street**

A pop-up public event to help launch a downtown organization featuring local businesses, free pizza, ice cream, photo booth and more

Please RSVP on Eventbrite by 9/16: [https://ice\\_cream\\_social.eventbrite.com](https://ice_cream_social.eventbrite.com)

**ALL ARE WELCOME!**

For more information, please contact Andrew MacNichol, Staff Planner at [amacnichol@reading-ma.us](mailto:amacnichol@reading-ma.us)



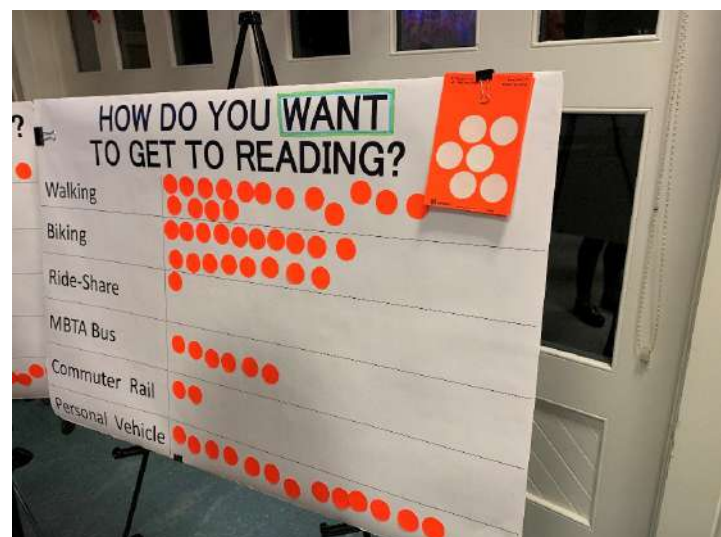
*ReImagine Reading*  
**SURVEY!**



Or by web: <https://www.readingma.gov/reimagine-reading>

Scan QR Code with your phone camera to take the survey

More Info on back 



*Stakeholder engagement process*



# Formation of a Business Improvement District in Hudson, MA



Provided by SME Consultant

Ann McFarland Burke, Downtown Consultant

Location

Hudson, MA

Origin	Downtown Hudson Business Association, Town of Hudson, MA	
Budget		MDI Grant for Technical Assistance. Town staff provided support to Steering committee.
Timeframe		Short term (<5 years). Planning, Signature campaign and Initiation took approximately 2 years
Risk		Medium Risk – property owner, business and political support required for success.
Key Performance Indicators	Formal vote by Board of Selectmen to formally establish the BID, corporate and tax filings completed, staffing and initiation of services	
Partners & Resources	Hudson Planning Dept, Property Owner Steering Committee, MDI, donated legal, graphic design	

## Diagnostic

The Hudson BID was formed to capitalize on an emerging renaissance of downtown and sustain positive economic growth. New activities, cultural events and entrepreneurs had begun the positive momentum for the downtown and stakeholders believed a BID would help ensure sustainable success. The BID created a way for downtown Hudson to implement a BID Improvement Plan that included wayfinding, enhanced and well-managed parking, infrastructure improvements, marketing and event coordination. The BID services were designed to help the downtown continue to grow and thrive as a destination to shop, work, live and visit.

Hudson had an engaged business community, as well as property owner and town administration support for the effort.

The strong steering committee and town support resulted in overwhelming buy-in of property owners (80%) and the unanimous vote by the Board of Selectmen to approve the BID.

## Action Item

To form a BID, a community must have the support of 60 % of the property owners representing 51% of the assessed within the proposed district. Hudson is a small BID with 120 parcels in the district.

The Downtown Hudson Business Association in partnership with the Town of Hudson spearheaded activities to form a BID and execute the step- by- step process to successfully create a BID in Hudson. This included:

- Identification of staff and financial resources
- Establishment of a strong property owner based steering committee
- Creation of a property owner outreach strategy
- Consensus among stakeholders on program priorities, fee structure, boundaries and budget
- Execution of the petition process and formal approval by Board of Selectmen
- Initialization of BID services

## Process

Forming a Business Improvement District is a four phase project. Resources to help a community organize and execute the strategies and legislative authorization process can be found in these publications :

[How To Form a BID in MA- Manual available at www.mass.gov/ MDI](http://www.mass.gov/MDI)

[BID Case Studies available at www. massdevelopment.com](http://www.massdevelopment.com)

Hudson began their BID formation process scratch.. A working committee that included stakeholder property owners and planning staff undertook the following steps to successfully build a BID in Hudson.

BID Case



## Process (Continued)

### PHASE 1 - TEST THE FEASIBILITY

1. Verify minimum baseline conditions
2. Develop a case statement for the BID.
3. Introduce the BID concept to stakeholders
4. Recruit the steering committee.
5. Find the resources.
6. Establish preliminary boundaries.
7. Create a property owner database.
8. Develop a plan outline and timeline.

### PHASE 2 - CREATE THE BID IMPROVEMENT PLAN

1. Conduct a needs assessment.
2. Outreach to the community.
3. Write the BID Improvement Plan.
4. Determine the budget.
5. Establish a fee formula.
6. Develop the Memorandum of Understanding.
7. Establish a billing mechanism.

### PHASE 3 - CONDUCT THE PETITION PROCESS

1. Prepare the BID Petition.
2. Organize the Petition Signature Campaign.
3. Mail information package to property owners.
4. Conduct the signature campaign.
5. Organize the legislative authorization process



## New entrepreneurs in Downtown Hudson



## Gateway Rotary to Downtown



## Process continued

### PHASE 4 - INITIATE OPERATIONS

1. Form Bylaws and Articles of Organization.
2. Establish the initial Board of Directors.
3. Apply for nonprofit status.
4. Communicate with members.
5. Hire staff.
6. Select vendors.
7. Formally launch services.

## Early Highlights

**A Seat at the Table / Partnership with the Town of Hudson-** The BID provides a unified voice and effective advocacy for downtown businesses and property owners.

- **Enhanced Downtown Appearance** - Implemented wayfinding signage, banners, hanging baskets, holiday lighting, benches and other physical enhancements to the district to create a more appealing experience for the visitors to downtown Hudson.

- **Rotary Gateway** - The BID has been active in the design, implementation and communication to property owners and tenants on the Gateway rotary project. These efforts help mitigate the disruption caused by construction by ensuring timely communication and execution of the project.

- **Business Support** -Actively working with property owners to retain and recruit tenants. Vacancy rates in the BID fell from 11% to 5% since its inception in 2017 . Provided free TA on PPP and other financial relief programs during Covid.

- **Creating Collaborations** - Formed new collaborations with groups and organizations that were previously untapped resources.

## The Legislative Authorization Process





# Culturally Competent Volunteer and Mentoring for Black Entrepreneurs



Provided by SME Consultant

Jeanette Nigro, Principal – Perch Advisors LLC

Location

New York City

Origin	Developed by Hester Street in partnership with United Way of New York City and Perch Advisors
Budget	 Development of training and implementation of volunteer/mentorship program cost under \$50,000
Timeframe	 Short Term (Less than 5 years) – Program was developed and launched in less than 6 months
Risk	 Low Risk: Public will was high and the program could be developed, scaled, and replicated
Key Performance Indicators	Number of volunteers trained on providing culturally competent mentoring; number of volunteers citing a better understanding of implicit bias and historical discrimination; number of businesses supported through volunteer/mentorship programs; exit surveying to determine impacts to improved business performance indicators.
Partners & Resources	Key partners could include: Municipalities and government agencies offering small business support, neighborhood and business organizations including Business Improvement Districts, Chambers of Commerce, Black business organizations; technical assistance partners offering no-cost services such as federal Small Business Development Centers (SBDCs), PTAC's, colleges and universities, business services organizations serving Black businesses such as Project Hope, Minority Business Development Agency, Community Development Financial Institutions (CDFI's), minority business associations, corporate partners with volunteer programs.

## Diagnostic

When the COVID 19 pandemic hit in March 2020, NYC businesses faced immediate and imminent closures. Particularly hard hit were businesses in the retail, services, and hospitality sectors. In NYC, the pandemic was poised to create an extinction level event for Black-Owned businesses, with many concentrated in the sectors hardest hit by the pandemic.

Black-businesses needed help - mentorship and peer support - to pivot their business, navigate loans and grants, and adapt operations to the new normal. But additionally, they needed the type of support that understood the history and lived experience of Black businesses, including discrimination in lending and leasing, and lack of community-based resources in neighborhoods.

The program was developed to train mentors and volunteers on how to deliver culturally competent technical assistance for Black-businesses. Three modules were developed to educate mentors on the history of discrimination of Black business owners, the ways in which implicit bias impact technical support, and how to engage in active listening and conversation. Volunteers and partners were required to complete the entire 3-part training prior to being matched with a business. Post training exit surveys showed a significant increase in understanding of the lived experience of Black business owners in NYC, the ways in which implicit bias could impact how volunteers support businesses, and improved ability to communicate in a non-judgmental and unbiased manner with their future mentees.

## Action Items

Developing a volunteer or mentorship program to provide one on one support for Black and minority businesses requires an understanding of the lived and historical experience of those served through this work. Black and minority businesses have historically been marginalized through community segregation, red lining, bias in bank lending, among other ways that impact not only how they run their business, but often foster a deep mistrust in the institutions designed to help them improve their businesses, particularly during a crisis like COVID-19. COVID has made it even more challenging for Black and minority businesses to trust a system which was neither developed to include nor communicate with them. The sheer volume of information on COVID support and resources, often overwhelming and conflicting, furthered confusion on what support business could access.

Equity and implicit bias training helps volunteers, mentors, and technical assistance providers understand the Black and minority business experience and how it impacts access and use of resources to help them stabilize and grow. Any municipality, community organization, or small business technical assistance provider can take the extra step to develop training that better prepares those who serve Black and minority businesses to provide more thoughtful outreach and service provision.

Initiating equity and bias training could include as many partners as are willing to collectively work together to train their staff and volunteers. It is suggested that an outside consultant with expertise in this area be brought in to align intended outcomes and develop and administer the training. Training can be ongoing and include any partners or organizations seeking to better serve Black and minority businesses in a more equitable and inclusive way.

## Process

- Identify organizations with community and business support experience that can develop culturally competent service delivery training. There are opportunities for smaller municipalities to collaborate to develop shared goals and content in order to reduce costs and
- Research the history of businesses within the community/city/municipality to gain a better understanding of their experience. Consider hiring an expert in the area of cultural competency and inclusion to support the development of training curricula.
- Identify the goals and outcomes intended for the training.
- Survey Black and minority businesses to understand their needs, identify how their needs are defined by their experiences, and in what ways mentors and volunteers can support their journey.
- Identify corporate or community partners committed to both providing mentorship and technical assistance and delivering support in a culturally respective way. Corporate sponsors with existing volunteer/mentorship programs, technical assistance providers, even municipal staff who support businesses can leverage their existing programs and improve their support to businesses.
- Partner organizations collaborate to review survey data, prioritize training needs for volunteers/mentors, and begin developing training.
- Test training with several organizations; use time within the training to ask questions in small groups; incorporate feedback and iterate training modules to ensure inclusivity and understanding.
- Pilot a small group of business and volunteer matches; observe and survey for impact.



Our mission is to help small businesses thrive across the Finger Lakes Region. We provide entrepreneurs and small businesses with the vital assistance, resources, and information they need. Nexus i90 makes support more accessible to foster equitable growth and inclusiveness and spur economic prosperity for our region.



## The Gateway for Entrepreneurs

We are dedicated to helping connect and grow the entrepreneurial community of the Finger Lakes region.

[Learn more](#)

# Facilitating Inclusive Entrepreneurial Ecosystem Building and Enhancement



Provided by SME Consultant

Third Eye Network, LLC

Location

Rochester, New York/Finger Lakes Region

### Origin

City of Rochester – Mayor’s Office of Community Wealth Building  
Rochester Institute of Technology (RIT) Center for Urban Entrepreneurship  
Rochester Economic Development Corporation (REDCO)

### Budget



\$417.5k Digital Infrastructure; \$1.5M Ecosystem Enhancement

### Timeframe



28 Weeks *(SourceLink Pro Implementation)*; 12 Months *(Regional CRM Expansion)*; 24 Months/cohort *(Ecosystem Enhancement)*

### Risk



Requires public and philanthropic investment, socio-political will and actively engaged collaboration among the entrepreneur support community

### Key Performance Indicators

Network Collaborations *(# of partners & referrals, funds raised, engagement rates)*, Community Commerce *(# of businesses/jobs created/retained, # and % of goals achieved)*, Ecosystem Enhancements *(# of new offerings/improvements, impact of policy changes)*

### Partners & Resources

Collaborators: City of Rochester Mayor’s Office of Community Wealth Building, RIT Center for Urban Entrepreneurship, REDCO, Rochester Public Library Business Insight Center, JustCause, Monroe County Economic Development Dept., Urban League of Rochester, IBERO-American Action League, M&T Bank Foundation, ESL Foundation, Rochester Downtown Development Corporation, SCORE Greater Rochester, PathStone Enterprise Center, Small Business Administration Rochester Chapter

Sponsors: Living Cities – City Accelerator Catalytic Capital Grant (\$100k); JPMorgan Chase – Matching & CRM Expansion Grants (\$137.5k, \$180k); Empire State Development/New York State – Ecosystem Enhancement Grant (\$1.5M)

## Diagnostic

## Strategy Feasibility Planning

- Biennial small business climate and needs assessment survey; allot three to four months for planning and execution at \$10k – \$15k
- 4 – 5 culturally-specific, peer-led focus groups (*e.g., Black-owned, Latinx-owned, and women-owned businesses, businesses earning over \$100k annually, and those who had prior dealings with the "Organizational Hub"*); 6 to 10 participants per group at \$15k – \$20k total
- Findings: Bureaucracy was a barrier; universal monocultural approaches fail; support resources and pathways were unclear, decentralized, and disjointed; little capital access and know-how

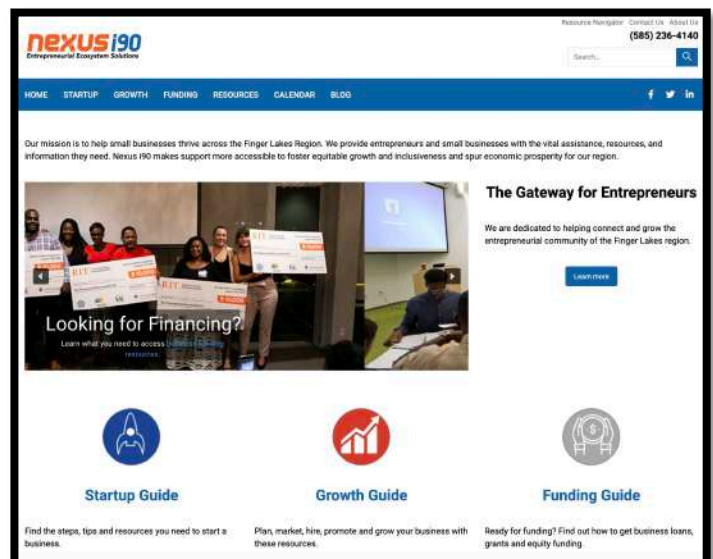
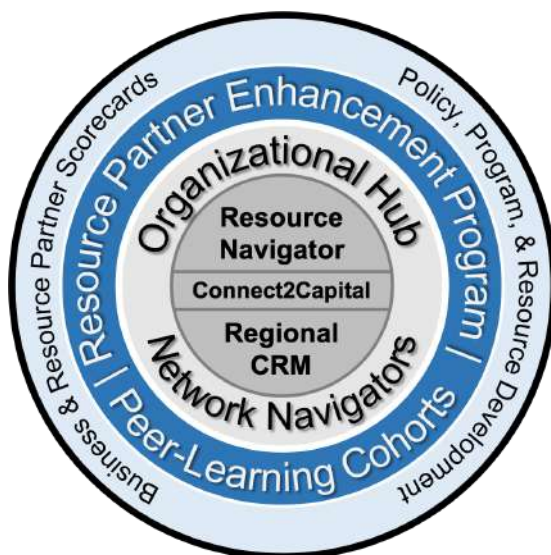
## Anti-Racist Community Building

- Host 3 – 5 three-day Undoing Racism® Workshops with The People's Institute for Survival and Beyond ([www.pisab.org](http://www.pisab.org)) for resource partners, small businesses, influencers, and other stakeholders; allot three to four months for planning and execution at \$13.5k/workshop, when hosting 2 or more
- Attend Kauffman Foundation's ESHIP Summit, join networks, and invest in related learning materials to plug into the global entrepreneurial ecosystem movement; allot up to \$2k/person
- Co-created the scale of proposed digital asset development activities (consider hyper-local versus regional approaches) with REDCO
- Spearheaded SourceLink implementation with key collaborators
- Hosted resource partner gathers during project kick-off and launch events
- Prepared and released resource partner enhancement program RFPs
- Selected cohort participants by committee
- Publicly launched and currently administering the inaugural cohort

## Action – Facilitating Nested “Hub and Spoke” Model Development

*Campbell's Nested “Hub and Spoke” Model for Inclusive Ecosystem Building and Enhancement*

*Nexusi90.org home page*



## Process – Digital Asset Development *(phased)*

### Resource Navigator Implementation (Nexusi90.org)

Select a vendor like SourceLink (joinsourcelink.com), establish a project team, and maintain a weekly meeting schedule to identify and map resources, develop site content, create social media pages and a hotline, participate in train-the-trainer workshops, and convene regional resource partners for project kick-off and pre-public launch meetings; allot four to six months at \$75k for implementation and \$15k for annual maintenance *(prices may vary by vendor, number of counties, population size, and/or features)*

### Custom CRM Development and Platform Integration

Determine the scope of work based on community needs *(Rochester was interested in expanding access to SourceLink's CRM so any resource partner in the region that wanted to adopt the platform as a system of record or integrate their organizational system with the shared platform)*; allot 12 months of planning and execution at \$180k *(future SourceLink clients would not incur this expense)*

Connect2Capital is a collaborative online lending network created by Community Reinvestment Fund USA; allot four months for planning and execution *(in progress)* at an unknown cost due to a third-party sponsor

## Process – Resource Partner Enhancement Program

### Peer-learning Cohort Program

**Program Planning:** Determine target cohort size based on funds raised for the program; prepare requests for proposals for prospective resource partner and organizational coaches cohorts; responses should articulate proposed enhancement plans from resource partners, and demonstrate coaches' expertise and commitment to support the cohort and program; and establish a selection committee and develop scoring rubrics before releasing both requests for proposals, conduct candidate selection and matching processes, and notify program participants; allot six months at \$750k – \$2M total for three to six resource partners *(\$150k – \$200k grants each)* and three to six organizational coaches *(\$100k – \$150k grants each)*

**Program Convenings:** Host two day convenings *(virtual or in-person)* to kick-off and receive major progress updates at the beginning, middle, and end of the program; these events should include culturally-relevant music, soul checks *(check-ins)*, opening remarks from dignitaries and program administrators, a keynote speaker, relevant panels, team presentations, engaging activities, and breakout rooms/groups; allot six to nine months for planning and execution at varying costs based on delivery format *(virtual vs. in-person)*, refreshments and parking fees according to the number of participants, insurance requirements, interpretation and translation service needs, entertainment, decorations, and honorariums; these costs should be equitably deducted from the funds awarded to the resource partners and organizational coaches cohorts

**Program Management:** Resource partners should meet with their assigned coaches at least bi-weekly throughout the program, all coaches should meet with program administration at least once monthly for check-ins, an "all-cohort" meeting should be conducted monthly with both cohorts for updates and cohort collaboration, and resource partners should meet with program administration for an individual onboarding session at the beginning of the program and periodically as warranted throughout the program

**Program Workshops:** All cohort members should be required to participate in an Undoing Racism® Workshop early in the program to inform their work, and principals and tools should be regularly revisited; two to three months for planning and execution at costs equitably deducted from the funds awarded to the resource partner and organizational coaches cohorts

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > SELLING TO BIG BUSINESS AND THE GOVERNMENT

## Selling to Big Business and the Government

**Selling to the Government**  
Government agencies and large corporations buy the same types of things most businesses do, professional services, supplies, landscaping services and so on. Selling to government agencies can be tricky though, and that's where Procurement Technical Assistance Centers ("PTAC") come in to play. PTAC officers provide small businesses throughout the region with assistance in submitting and understanding bidding opportunities and contracts. Often, they also support businesses in gaining certifications for women-, veteran- and minority-owned businesses.

**Becoming Certified**  
Certification programs can help you market your business to both large business and governments. Many large corporations and governmental entities set aside a percentage of their purchasing contracts for small businesses, minority and/or women owned businesses. Becoming "certified" as one or more of these types of businesses enables a company to bid on contracting opportunities. MWBE.com offers a description of certification.

Most government entities will require a company to at least go through a streamlined or shortened verification process that is specific to that agency. Certification can take from 30-90 days.

Find local resources to help with procurement by searching the [Resource Navigator](#).

**Growth Guide**  
Maintaining Growth  
Marketing to Drive Profit  
Exporting to Expand Sales  
**Selling to Big Business and the Government**  
Hiring and Managing Employees  
Events and Advisors  
Exit Strategies  
Networking for Growth

**Need help? Call Us (585) 236-4140**  
We're here to help you start and grow your business.

Can't find what you're looking for? Have a suggestion? Let us know.

Photo credit: City of Rochester

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > GET FUNDING

## Get Funding

Contrary to popular belief there are only a very few grants available to start and grow businesses.

[Read The Truth About Free Government Grants.](#)

### Estimate the amount of funding you need to secure financing for your business

Start at the beginning: how much money do you need and for what?

- Tips on estimating startup costs (SBA)
- Online startup costs calculator (Bizplans.com)
- Small Business Development Center (SBD) counselors can also help you determine your startup or expansion financing needs

**Determine the Best Source of Funding**  
Overview of business financing (Bizfilings by CT)  
Quick Pick chart of funding sources based on stage of business (Bizfilings by CT)

**Put Together a Business Plan**  
Get more information on specific types of funding:

- Friends and Family Funding
- Types of Loans Available
- SBA/Bank Loans
- Angel and VC Investment
- Technology Grants

**Funding Guide**  
**Get Funding**  
The Truth About Free Government Grants  
Friends and Family Funding  
Types of Loans Available  
SBA/Bank Loans  
Angel and VC Investment Groups  
Technology Grants

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Photo credit: US Business Plan Competition

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > RESOURCE NAVIGATOR

## Resource Navigator

To request that your organization be included in the Nexus i90 Resource Navigator, please complete this [online form](#).

**Narrow Your Search**  
Zip Code or City, State  
Distance  
Area of Assistance  
Specific Need  
Opportunity Populations  
Business Type  
Business Stage  
Industry  
Keyword

**Refine Search**

48 items in 4 pages

**theohub.com**  
A directory of the advertising industry listing Ad Agencies, Freelancers and other marketing resources to help companies promote their business.

**Ain Center for Entrepreneurship at the University of Rochester**  
The Ain Center for Entrepreneurship at the University of Rochester is an interdisciplinary center that educates the University and Rochester communities on developing and applying an entrepreneurial mindset via training programs and other offerings.

**Black-owned Business (BOB) Rochester**  
Black-owned Business (BOB) Rochester is a community-driven marketing and promotional resource serving Greater Rochester (NY) area BOBs. BOB Rochester was created to empower Black enterprises, public service organizations, affinity groups, and associations.

**Business Insight Center**  
Our competitive edge you need. No matter how big or small your enterprise is, we are here to help. Our market research services don't just save your company time and money, we can also identify potential customers to help increase your bottom line.

**Carlson Center for Intellectual Property**  
The Carlson Center for Intellectual Property assists with prior art searches and filing for patents, trademarks, and copyright.

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > EVENTS

## Events

Search for events

**Now onwards**

Filters

Event Category  
Cost \$0  
Venue  
Organizers  
Day  
Time  
City  
Featured Events

May 2021

May 20 @ 12:00 pm - 1:00 pm EDT

**Level Up: Rochester Edition featuring Nita Brown**  
Online  
Walker's Legacy Foundation, the nonprofit arm of Walker's Legacy, is proud to present Level Up: Rochester Edition, a digital speaker series created to support existing and aspiring female entrepreneurs seeking guidance, encouragement, and practical advice. Level Up: Rochester Edition will take place on March 18, 2021 at 12 PM EDT, and will feature guest Nita Brown.

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > STEPS FOR SUCCESSFUL STARTUPS

## Steps for Successful Startups

**Step 1: Prepare for Success**  
Take the time to find out if your idea is viable. Who will buy your product or service? What's happening in your industry?

- Research your market
- Take a startup class
- Talk to a startup counselor

**Step 2: Plan Your Business**  
Good business planning keeps you focused, and can be the difference between failure and success.

- Take a business planning class
- Write a business plan
- Talk to a business planning counselor

**Step 3: Register and License Your Business**  
You'll need to go through several steps to make sure your business can operate legally.

**Startup Guide**  
Steps for Successful Startups  
Prepare for Success  
Plan Your Business  
Register and License Your Business  
Forms of Business Organization

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HOME STARTUP GROWTH FUNDING RESOURCES CALENDAR BLOG

HOME > NEWS > ADMINISTRATIVE > FINALLY WE HAVE REACHED OUR NEXUS!

## Finally, We Have Reached Our Nexus!

By Dr. Lorrie B. Campbell | Administrative

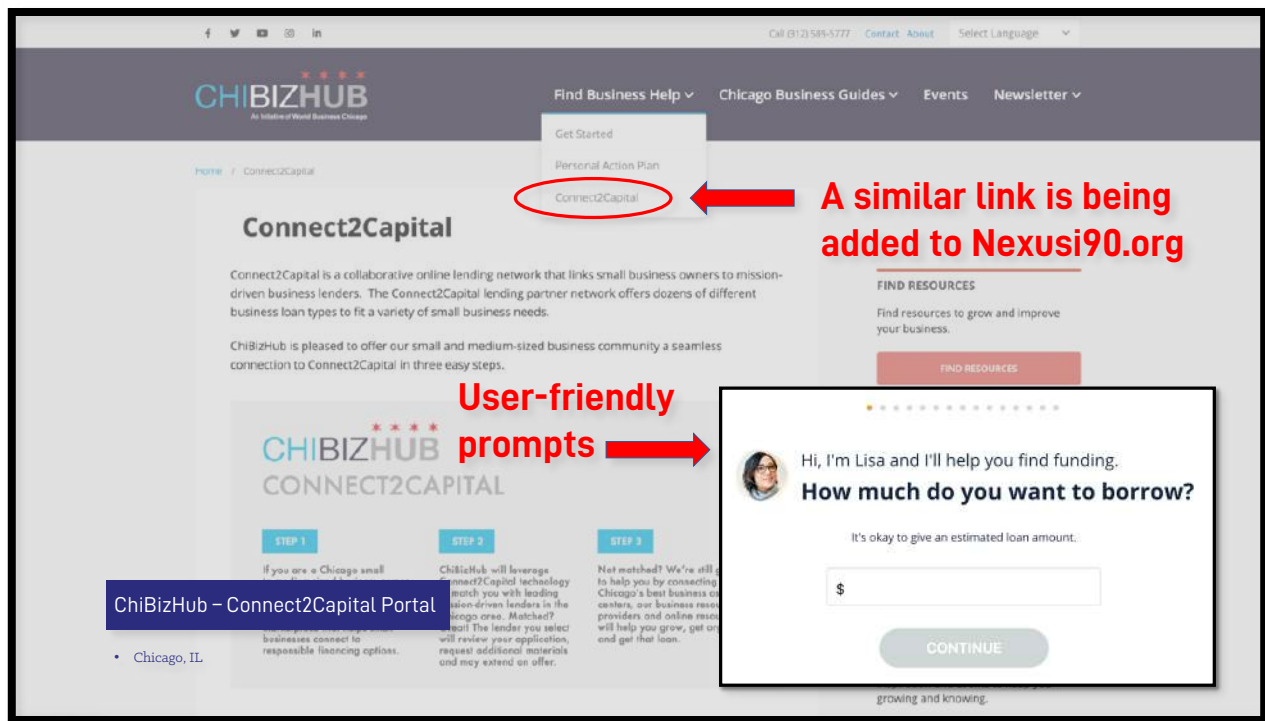
**Recent Posts**  
• Three C's of Launching and Growing a Small Business Part 3  
• Three C's of Launching and Growing a Small Business Part 2  
• Finally, We Have Reached Our Nexus!  
• Three C's of Launching and Growing a Small Business Part 1

**Recent Comments**

**Archives**  
• September 2020  
• August 2020

Nexus i90 screenshots





SourceLink affiliate ChiBizHub demonstrates how the Connect2Capital portal will integrate into Nexusi90.org

Resource Partner Enhancement Program – Cohort I Member Organizations



Each Cohort I member above focuses on different entrepreneurial cultural communities: Black-owned, Latinx-owned, Women-owned businesses, low-to-moderate income residents, previously incarcerated and justice system involved residents, and food-based businesses (including new ventures and those who previously operated informally)

**Whether you are a Black business owner seeking resources or a partner seeking to support Together We Thrive, tell us a little bit about yourself and how you'd like to get involved.**

I'm a Business

I'm a Volunteer/Partner/Donor



# Launch an Equitable Technical Assistance Network for COVID Pandemic Relief and Beyond



Provided by SME Consultant

Jeanette Nigro, Principal – Perch Advisors LLC

Location

New York City

Origin	Led by: United Way of New York City in partnership with Perch Advisors, Hester Street (Community Development NFP), MoCaFi (FinTech), Greater Jamaica Development Corporation (CDFI and CDC) – With technical support from PACE Small Business Development Center, New York City Department of Small Business Services and in partnership with local and national CDFI's such as LISC and TruFund
Budget	 <p>Program's current budget – HIGH (\$200K+)</p> <p>Program was launched with only in-kind support and technical assistance services</p>
Timeframe	 <p>Short Term (Less than 5 years) – Program was planned and launched in under 9 months</p>
Risk	 <p>Low Risk: In general, support for helping small businesses recover and grow after COVID is at an all time high. Work in this space has the capacity to receive a high level of support and public will. Enhanced services would require additional investment, but work in this area can be launched with little upfront financial resources.</p>
Key Performance Indicators	Number of Businesses enrolled; Total services and referral partners; Neighborhood peer networks created; Total successful mentorship matches; Capital access (loan and grants awarded); jobs created/retained
Partners & Resources	Key partners could include: Municipalities and government agencies offering small business support, neighborhood and business organizations including Business Improvement Districts, Chambers of Commerce, Black business organizations; technical assistance partners offering no-cost services such as federal Small Business Development Centers (SBDCs), PTAC's, colleges and universities, business services organizations serving Black businesses such as Project Hope, Minority Business Development Agency, Community Development Financial Institutions (CDFI's), minority business associations

## Diagnostic

This project was launched in response to the lack of coordinated support to inform and reach NYC Black-Owned businesses on available technical assistance and loan and grant program to support recovery from the COVID-19 pandemic. Without immediate resources available at the start of the pandemic, the lead partner -- United Way of New York City (UWNYC) -- quickly identified resources that were no-cost or already offered through their programs, and collaborative partners who would be willing to contribute time and knowledge to reach and help Black owned businesses.

By leveraging its wide reach of vendors, community and neighborhood-based organizations, and corporate partners, the UWNYC was able to pull together a collaboration of 8 organizations in under 3 weeks. The partners agreed to share information, resources, and networks and meet weekly to plan and develop the program including marketing and outreach strategy, technical assistance programming, and business intake, referrals and follow up.

In the following months, a comprehensive clearing house and network of technical assistance providers were built; a website with business intake forms to identify specific needs and priorities of Black businesses was launched, and a triage and referral process for businesses was created, with United Way of New York City managing and tracking businesses and technical assistance providers throughout the process.

Additional volunteer partners and technical providers were continually added to the collaboration to improve the range of services and supports to Black-owned businesses. The program continues to market support to businesses and seeks to build out community peer to peer business networks in 2021 to further support Black businesses at the neighborhood level.

## Action Items

The project began with UWNYC identifying, engaging, and coordinating technical assistance partners and organizations that could advise on challenges small businesses were experiencing and technical assistance solutions, with a focus on equity and inclusion specifically for Black-Owned businesses. A key component of the work was gaining the commitment of organizations to ongoing collaboration.

The group then worked with NYC agencies to better understand Black-owned businesses through data which enabled the group to target neighborhoods and industries with higher concentration of Black-owned businesses.

Simultaneously, technical assistance partners were structured and organized around key themes, among them: financing and grants, pandemic operating and regulatory support, marketing/social media, e-commerce, reengineering business offerings and operations, and legal support.

A business intake portal was built through UWNYC's existing platform, which did not incur any additional investment. Co-lead staff were assigned at UWNYC to manage incoming businesses and volunteer signups and assess and refer businesses to technical assistance partners. Partner teams met with neighborhood groups to share information on the program and support street-level outreach to Black-owned businesses, particularly those in retail, hospitality, and services.

United Way and several partners reviewed business intake weekly; conducted phone consultations, made appropriate referrals, conducted follow up, and directed businesses to additional services as needed.

## Process

- Identify lead partner with available resources (staff time, technology, sufficient public-private networks) to initiate building a collaboration, leading meetings, developing a small business resource pipeline, and coordinating business outreach and neighborhood engagement.
- Identify organizations to collaborate with that have resources to lend – staff, expertise in small business technical assistance, business outreach, infrastructure, technology, social media reach.
- Formally create coalition – set parameters of engagement, project goals and milestones, meeting schedule, project management processes.
- Organize available business services and define how they apply to Black-owned businesses.
- Identify high priority needs through engagement – surveys, door to door outreach, partner interviews.
- Create marketing and outreach strategy; create business intake that aligns with needs identified and service offerings.
- Engage organizations that reach Black-owned businesses and conduct door to door outreach.